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# FISCAL INTERMEDIARY ONLINE SURVEY RESULTS

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March 30, 2023

DEVELOPMENTAL DISABILITIES ADVOCACY NETWORK (DDAN)  
Person-Centered/Self-Directed Services Committee

## Executive Summary

### Survey

The survey was designed for the individuals with disabilities, families, direct support professionals, support coordinators, and support brokers that use financial management services to deliver self-direction. The purpose of this survey was to collect feedback on the fiscal intermediaries, Easterseals and Public Partnerships LLC (PPL), used in New Jersey. The survey was open for about four months, from June 20, 2022 to October 31, 2022, and it collected 370 responses. The results can be found in the later sections.

### Recommendations

1. The State adds more fiscal intermediary agencies so that individuals and families have more choice
  - a. The quality of service provided by fiscal intermediaries can be improved by promoting healthy business competition among providers.
2. Both Easterseals and Public Partnerships, LLC improve their customer service and shorten the time to resolve issues.

## Acknowledgment

The Developmental Disability Advocacy Network (DDAN) Person-Centered/Self-Directed Services Committee thanks the individuals with intellectual/developmental disabilities, the families, and disability service professionals who participated in the survey to share their invaluable feedback and comments.

### DDAN Person-Centered/Self-Directed Services Committee Members (alphabetical order)

- Mary Claire Gomeringer, Parent
- Liza Gundell, The Family Resource Network
- Joyce Jelly, The Boggs Center on Developmental Disabilities, Rutgers Robert Wood Johnson Medical School
- Mary Kneuer, Parent
- Ann Martinelli, Parent
- Melanie McGackin, Parent
- Peter Philipps, Parent
- Natalie Trump, Parent

### New Jersey Council on Developmental Disabilities (Support Staff, alphabetical order)

- Kyoko Coco, Family Support Coordinator
- Kerry McGrath, Family Support Liaison

## Developmental Disability Advocacy Network

The [New Jersey Developmental Disability Advocacy Network \(DDAN\)](#) consists of self-advocates, family members, support providers, and disability stakeholders. There are 8 key issue committees including Person-Centered/ Self-Directed Services (PC/SD Services). The PC/SD Services committee conducted a survey of individuals with intellectual or developmental disabilities, family members, and disability service professionals that use fiscal intermediaries to better understand their experience with the program. Fiscal intermediaries are financial management service agencies meant to provide payroll and tax support assistance for self-directing families that hire self-directed employees (SDEs)<sup>1</sup>. In New Jersey, there are two fiscal intermediary agencies, Easterseals and PPL, which were assessed through this survey.

The survey was open for about four months, from June 20, 2022 to October 31, 2022, and it collected 370 responses. The survey was programmed to skip, show or hide certain questions depending on answers. For instance, if respondents answered that they use Easterseals only, questions regarding PPL were skipped. For this reason, some questions below will have smaller response numbers than others.

The results from the survey for Easterseals can be viewed at:

[https://www.surveymonkey.com/stories/SM-z2KoAz2e2r4YeTwTN\\_2BSAQ\\_3D\\_3D/](https://www.surveymonkey.com/stories/SM-z2KoAz2e2r4YeTwTN_2BSAQ_3D_3D/)

The results from the survey for Public Partnerships, LLC can be viewed at:

[https://www.surveymonkey.com/stories/SM-07tX4qDUYLrfmajZfFqIPg\\_3D\\_3D/](https://www.surveymonkey.com/stories/SM-07tX4qDUYLrfmajZfFqIPg_3D_3D/)

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<sup>1</sup> <https://www.state.nj.us/humanservices/ddd/individuals/community/selfdirected/>, Accessed 12/31/2020

## Survey results

*Figure 1: I am a(n)... (Choose all that apply)*

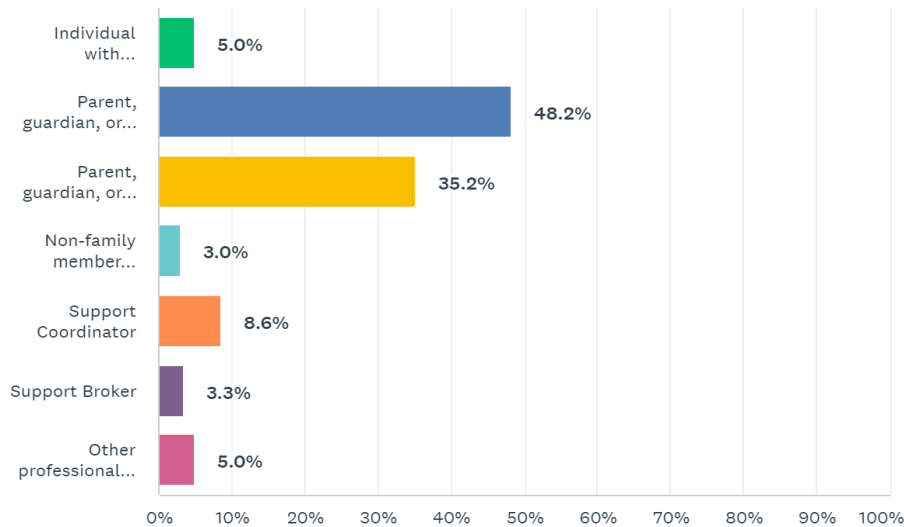


Figure 1 breaks down the demographic of the individuals taking the survey and their relation to individuals with disabilities. Out of 361 responses, the most common response was parents, guardians, and family members that were unpaid with 174 responses (48.2%). This was followed by parents, guardians, and family members that were paid (127, 35.2%), support coordinators (31, 8.6%), individuals with disabilities (18, 5.0%), supports brokers (12, 3.3%), and non-family member staff/direct support professionals (11, 3.0%). There was an option for “other” for professionals not covered, which had 18 responses (5.0%). The most common response in this category was “provider” (9 responses), which consisted of goods and service providers, transportation providers, vocational rehabilitation providers, and residential or day program providers. The remaining responses were advocates without disabilities (2), support coordination referral specialists (2), a case worker (1), an Employer of Record for PPL (1), a psychologist (1), and a self-directed employee (1). The invalid response was “none”. (See Table 1 below)

*Table 1: Other Responses*

Characterization	Number of Responses
Provider	9
Advocate without disability	2
Support Coordination Referral Specialist	2
Case Worker	1
PPL Employer of Record	1
Psychologist	1
Self-Directed Employee	1
Invalid	1
<b>Total Responses</b>	<b>18</b>

**Figure 2: What is the age of the individual(s) with disabilities using financial management services? (Check all that apply)**

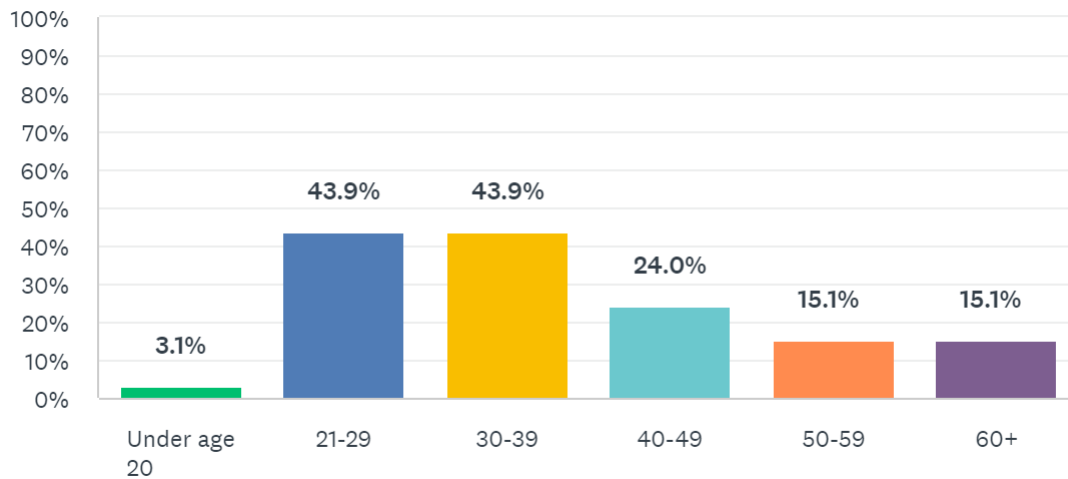


Figure 2 represents the age group of the individual(s) using financial management services. Respondents were able to select multiple options, which resulted in a higher number of responses. Individuals between the ages of 21-29 and 30-39 were equally represented with 157 responses (43.9%). The next age groups were individuals between the ages 40-49 (86 response, 24.0%), individuals between the ages of 50-59 (54 responses, 15.1%), and individuals ages 60+ (54 responses, 15.1%)., which both had 54 responses (15.1%). Finally, individuals under the age of 20 were represented with 11 responses (3.1%).

**Figure 3: Which county does the individual with I/DD reside?**

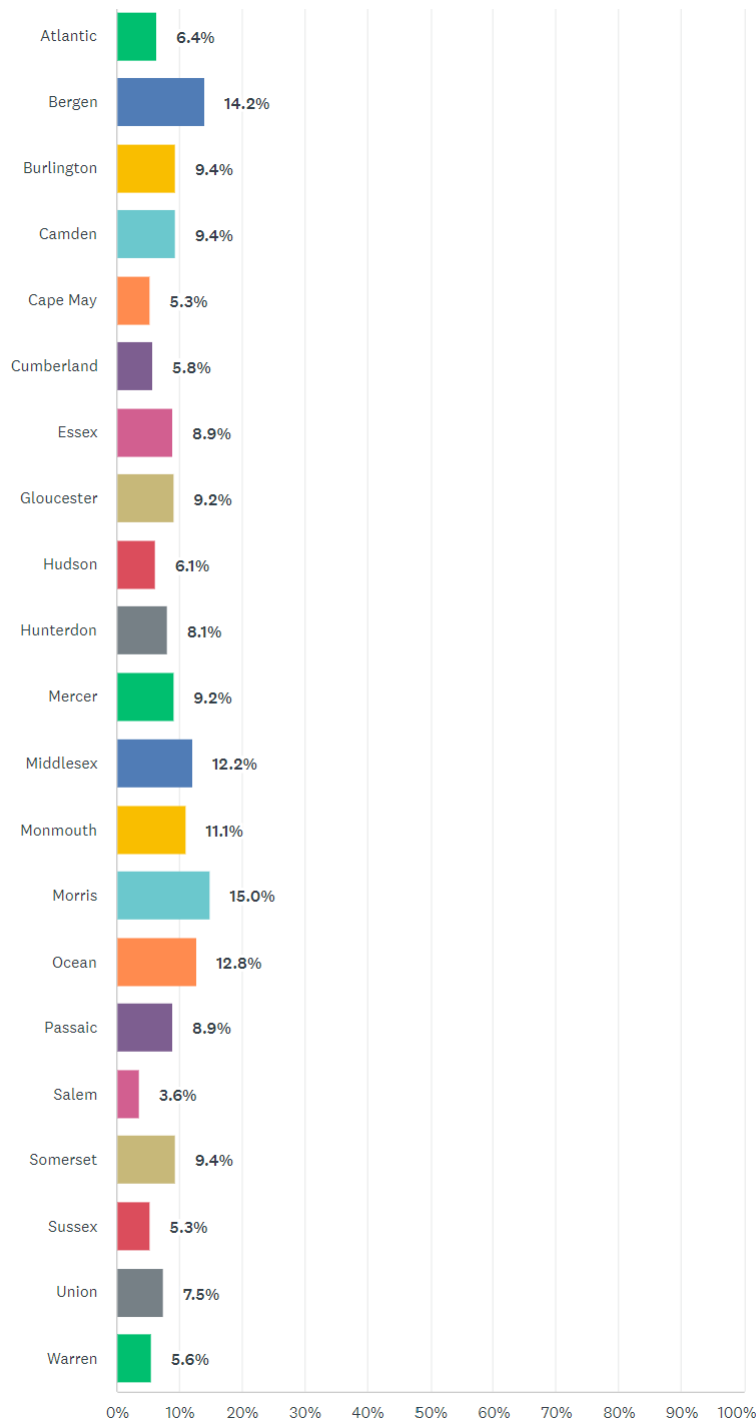


Figure 3 represents a breakdown of the county of residence for the individual with disabilities. Service providers for people with disabilities often serve individuals in several counties, so survey allowed respondents to select all the applied. There were 360 responses, the two most common counties selected were Morris and Bergen counties with 54 responses (15.0%) and 51 responses (14.2%), respectively. These counties were followed by Ocean County (46 responses,

12.8%), Middlesex County (44 responses, 12.2%), and Monmouth County (40 responses, 11.1%). Next, Burlington, Camden, and Somerset counties each had 34 responses (9.4%); Gloucester and Mercer counties had 33 responses (9.2%); and Essex and Passaic counties had 32 responses (8.9%). The last nine counties had responses ranging from 29 (Hunterdon County, 8.1%) to 13 (Salem County, 3.6%).

**Figure 4: Choose service(s) individual(s) with disabilities is/are receiving**

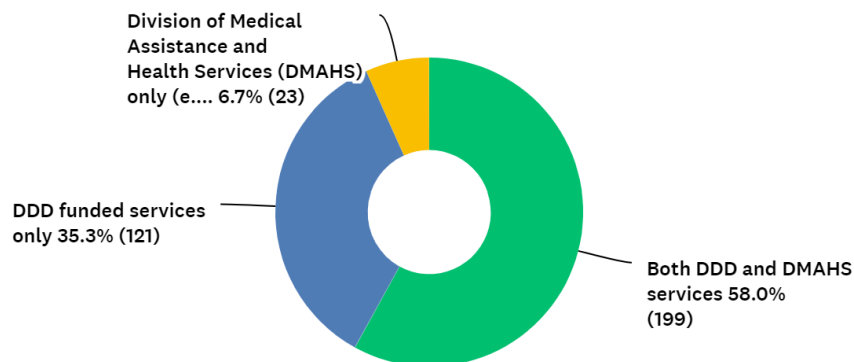


Figure 4 asked respondents what government agency, Division of Medical Assistance and Health Services (DMAHS) or Division of Developmental Disabilities, is funding services for the individual with disabilities. Out of 343 responses, 199 responses (58.0%) identified that the individual is receiving services from both the DDD and DMAHS. Another 121 respondents (35.3%) were only receiving services through DDD and 23 respondents (6.7%) were only receiving services through DMAHS.

**Figure 5: Which financial management service agency do you work with?**

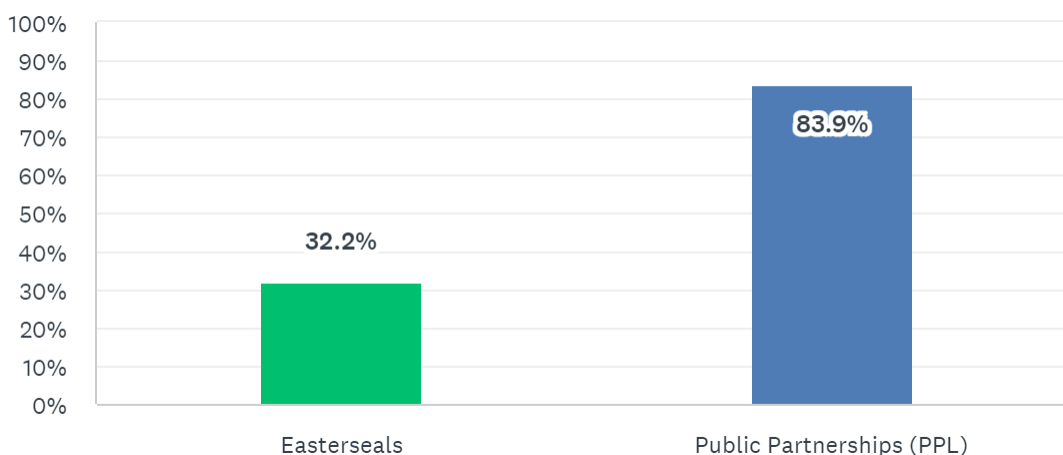


Figure 5 asked respondents what fiscal intermediary agency they worked with and they were able to choose both agencies if it applied. 354 respondents answered this question, 297 respondents (83.9%) reported using PPL as their financial management service agency and 114 respondents (32.3%) reported using Easterseals.



*Figure 6: How satisfied [are you] with fiscal management services from Easter?*

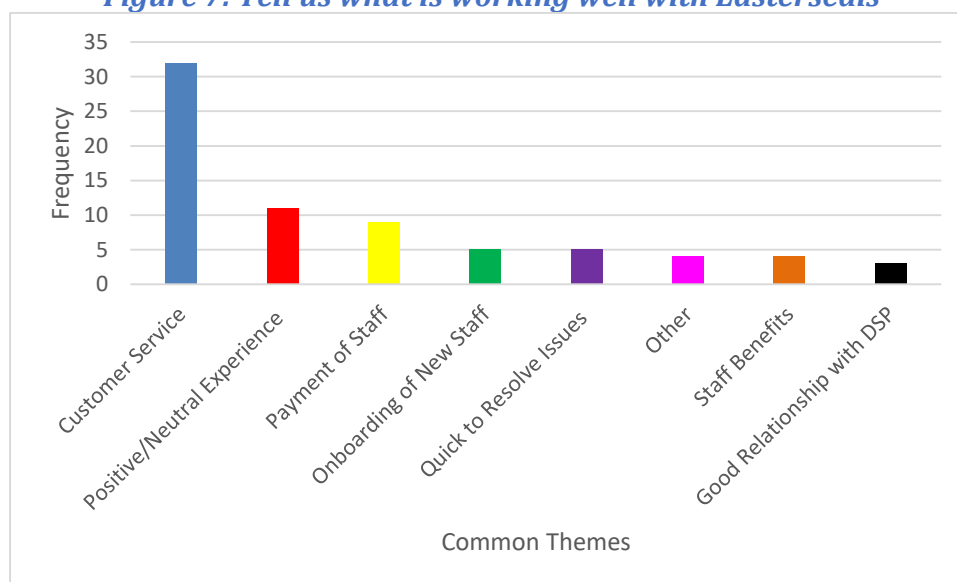


*Table 2: Satisfaction of Easterseals Services*

<b>Rating</b>	<b>Number of Response</b>	<b>Percentage</b>
<i>Extremely Dissatisfied</i>	16	17.4%
<i>Somewhat Dissatisfied</i>	14	15.2%
<i>Neutral</i>	11	12.0%
<i>Somewhat Satisfied</i>	22	23.9%
<i>Extremely Satisfied</i>	29	31.5%
<b>Total</b>	<b>92</b>	
<b>Weighted Average (out of 5 stars)</b>	<b>3.37</b>	

Figure 6 and Table 2 represent the 92 respondents' satisfaction with Easterseals and the weighted average of those responses. Easterseals' weighted satisfaction rating was 3.37 stars out of 5 stars. More than half the respondents reported being either extremely satisfied (29, 31.5%) or somewhat satisfied (22, 23.9%). However, 16 respondents (17.4%) reported being extremely dissatisfied, 14 respondents (15.2%) reported being somewhat dissatisfied, and 11 respondents reported being neutral (12.0%).

*Figure 7: Tell us what is working well with Easterseals*



**Table 3: Tell us what is working well with Easterseals**

<b>Common Themes</b>	<b>Frequency</b>
Customer Service	32
General Positive/Neutral Experience	11
Payment of Staff	9
Onboarding of New Staff	5
Quick to Resolve Issues	5
Other	4
Staff Benefits	4
Good Relationship with DSP	3
Total Responses	74

There were 66 individual responses to the open-ended question asking what Easterseals is doing well. However, 7 responses were omitted from the analysis because they explained negative experiences with Easterseals, in addition some of the comments highlighted both positive and negative experiences with Easterseals. All of the negative experiences have been moved to Question 22, where respondents were able to discuss an additional comments and concerns, and have been reflected in that question's data analysis. As a result, Figure 7 and Table 3 represent the remaining 59 positive or neutral responses about Easterseals.

Out of the 59 responses, 30 responses discussed the friendliness, availability, and helpfulness of Easterseals' customer service and 5 mentioned Easterseals' timeliness in responding to issues. There were 11 responses expressing a positive or neutral experience with Easterseals without elaborating, 9 responses said that staff payments were processed in an accurate and timely manner, 5 addressed the ease of onboarding new staff and 4 responses pertained to the staff benefits, such as health insurance and paid time off, and supports from Easterseals. Another 3 responses liked the relationship they have with their DSP. Finally, there were 4 responses that did not pertain to the above themes and were considered "other".

Below are a few responses including the common themes:

- *Everyone at easterseals is always so friendly and willing to work wit (sic) you when a problem arises. They are always there to help you figure it out in such a very kind way. There needs to be more people in the world like these very special kind people* (Customer Service)
- *Excellent customer service. Reps are more than accommodating with answering questions and returning calls!* (Customer Service)
- *Always get a person when you call customer service and issue is worked on right away.* (Customer Service; Quick to Resolve Issues)
- *They double check all pay sheets. I am paid on time* (Payment of Staff)
- *Families are satisfied with them. They offer health benefits.* (Positive/ Neutral Experience; Staff Benefits/Support)

- *The staff are receptive to my daughter's service needs. They onboarded a recent SDE in a timely and thorough manner. (Onboarding and training; Good relationship with SDE)*
- *The pay rates and things are easy to read and put into i-record. (Other)*
- *Provided an activity 5 days a week. (Other)*
- *I will start on 10/23/2022 (Other)*
- *The fact that their (sic) is help an programs like this to assist with funding for Caregivers (Other)*

**Figure 8: In which areas have you had issues with Easterseals**

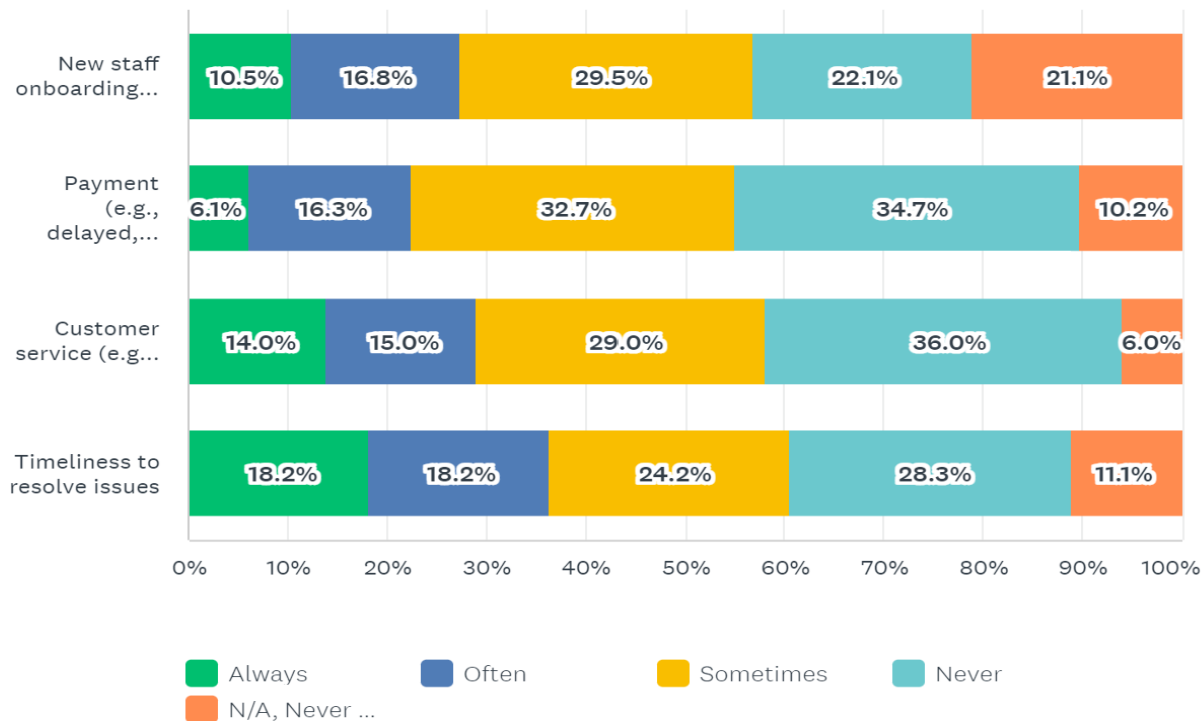


Figure 8 represents how often respondents have had an issue with Easterseals regarding 4 key area: new staff onboarding, payment, customer service, and timeliness to resolve issues. 101 respondents answered this question, but some respondents did not answer all the questions.

#### New staff onboarding:

Out of 95 individual responses, 10 (10.5%) reported always having an issue onboarding new staff, 16 (16.8%) often have this issue, 28 responses (29.5%) sometimes have this issue, 21 responses (22.1%) never had this issue and 20 (21.1%) reported that this issue is not applicable to them.

#### Payment:

Out of 98 responses, 6 (6.1%) always having an issue paying their staff, 16 (16.3%) often have this issue, 32 (32.7%) sometimes have this, 34 (34.7%) never had this issue, and 10 responses said that a payment issue is not applicable to them.

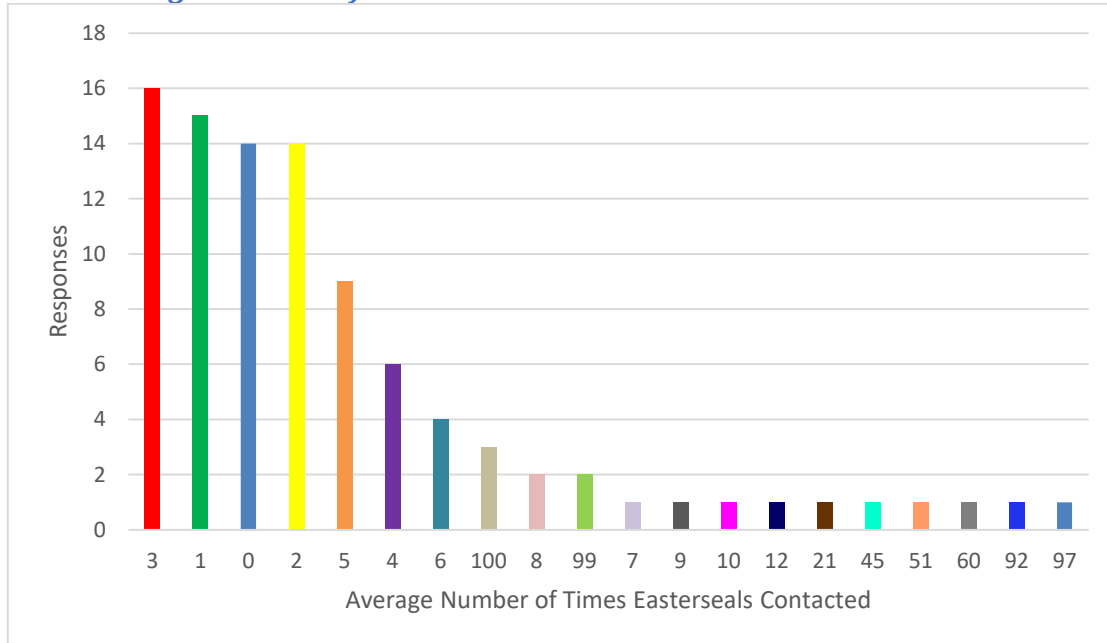
### Customer Service:

Out of 100 responses, 14 responses (14%) reported always having an issue with Easterseals' customer service, such as not having their call returned or not getting their questions answered. Additionally, 15 responses (15%) reported often having a customer service issue, 29 (29%) sometimes have this issue, 36 responses (36%) never had this issue, and 6 (6.0%) responded that a customer service issue is not applicable to them.

### Timeliness to Resolve Issues:

Out of 99 responses, 18 (18.2%) reported always having an issue with the timeliness of their issues being resolved, 18 (18.2%) often have this issue, 24 (24.2%) sometimes have this issue, 28 (28.3%) never had this issue, and 11 (11.1%) reported that Easterseals' timeliness in resolving issues was not applicable to them.

**Figure 9: Average Number of times Easterseals was contacted to resolve one issue**

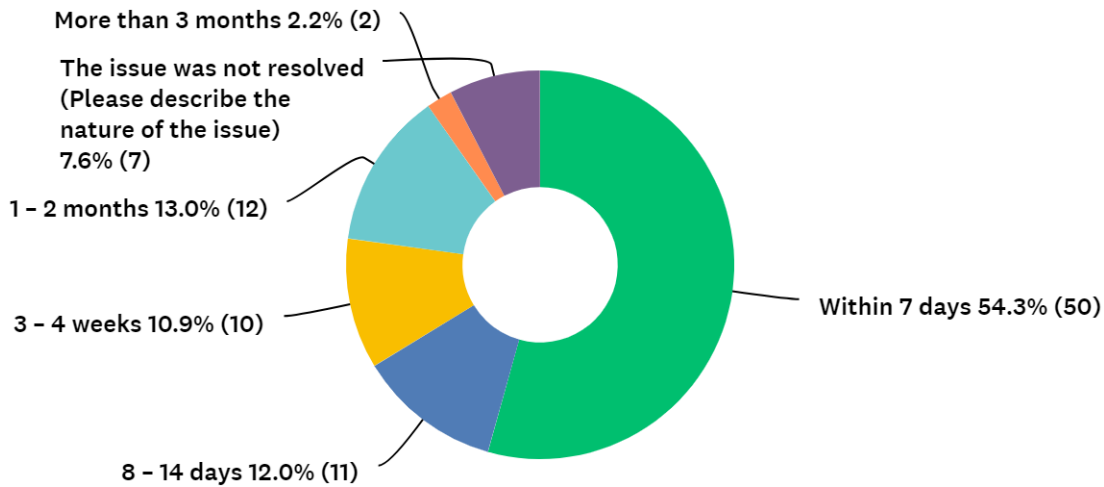


*Table 4: Average number of times Easterseals was contacted to resolve one issue*

Times Contacted	Responses	Percentage
3	16	16.8%
1	15	15.8%
0	14	14.7%
2	14	14.7%
5	9	9.5%
4	6	6.3%
6	4	4.2%
100	3	3.2%
8	2	2.1%
99	2	2.1%
7	1	1.1%
9	1	1.1%
10	1	1.1%
12	1	1.1%
21	1	1.1%
45	1	1.1%
51	1	1.1%
60	1	1.1%
92	1	1.1%
97	1	1.1%
<b>Total</b>	<b>95</b>	<b>100.4%</b>

Figure 9 and Table 4 represent the average number of times a respondent contacted Easterseals to resolve one issue. There were 95 responses, the most common number of times contacted was 3 (16 responses, 16.8%), followed by 1 (15 responses, 15.8%); 0 (14 responses, 14.7%); and 2 (14 responses, 14.7%). Most respondents reported having to call 10 times or less (83 responses, 87.4%). The highest number of times reported was 100 (3 responses, 3.2%).

*Figure 10: On average, how long did it take the issues to be resolved?*



*Table 5: Nature of issue that was not resolved*

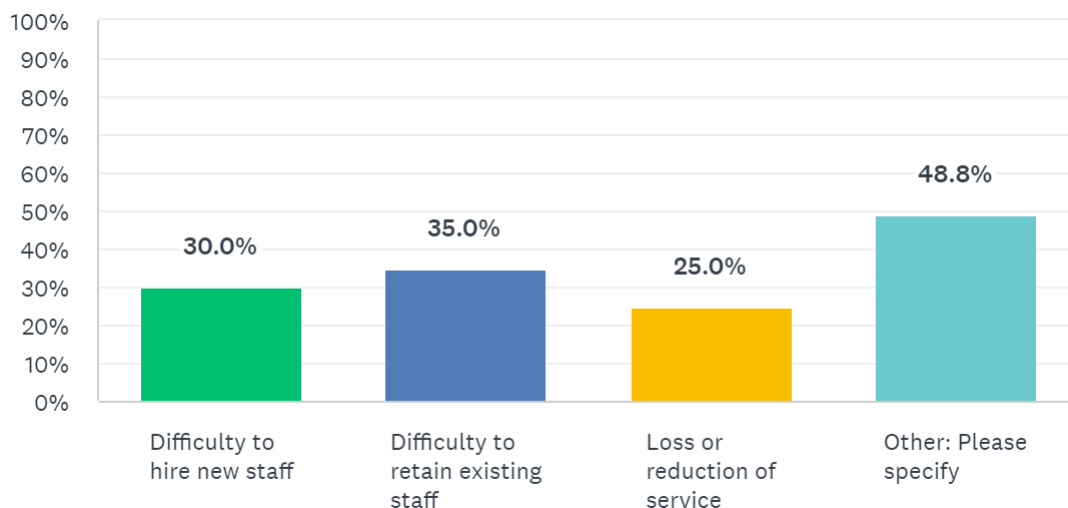
Responses	Number
Payment Inaccuracies	2
Timesheet Signatures	1
Electronic Visit Verification	1
Denying Services	1
Questions about Intake Form	1
Not applicable	2
<b>Total</b>	<b>8</b>

Figure 10 and Table 5 represent how long, on average, it takes Easterseals to resolve an issue. There were 92 responses, 50 responses (54.3%) reported having their issues resolved within 7 days, 12 responses (13.0%) said it took an average of 1-2 months; 11 responses (12.0%) reported it took about 8-14 days; and 10 responded that it took an average of 3-4 weeks. There were 2 responses (2.2%) that reported it took Easterseals more than 3 months to resolve their issue(s) and 7 responses noted that their issue was not resolved. The nature of the issues identified include: payment inaccuracies (2), timesheet signatures (1), electronic visit verification not working (1), a denial of services (1), and questions about the intake form (1). 2 responses were not applicable because they reported never having an issue or that the question did not pertain to them. (See table 5)

Below are a few responses including the common themes:

- *POOR SERVICE AND THEY ARE CHARGING MY SISTER'S BUDGET AND THEY HAVE NEVER MET HER AND GET TO MAKE DECISIONS THAT HARM HER AND DENY SERVICES FOR HER* (Denying Services; Payment Inaccuracies)
- *Short changed on my hours worked* (Payment Inaccuracies)
- *Evv not working* (Electronic Visit Verification)
- *basic questions about intake form* (Questions about Intake Form)

**Figure 11: How do you think the issue negatively affected the individual(s) with disabilities?**



**Table 6: How do you think the issue negatively affected the individual(s) with disabilities (Other)**

Responses	Number of Responses
No effect	19
Delay in service delivery or service payment	9
Hiring/onboarding/training staff	5
Individual's budget affected	2
Decrease in community integration	2
Other	5
<b>Total</b>	<b>42</b>

Figure 11 and Table 6 represent how any issues negatively affected the individual(s) with disabilities. Out of 111 responses, 28 (35.0%) identified a difficulty in retaining existing staff, 24 (30.0%) reported difficulty in hiring new staff, and 20 (25%) stated a loss or reduction of services. Of the 39 “other” responses, 19 responses reported they have never had an issue or that the issue has had no effect on the individual(s) with disabilities; 9 said the issue affected service delivery and service payment; and 5 reported a problem hiring, onboarding, and training new staff. Additionally, 2 responses mentioned how the individual’s budget was affected, 2 responses highlighted the decrease in community integration, and 5 responses did not pertain to the above listed themes and were categorized as “other”.

Below are a few responses including the common themes:

- *loss of access to her total annual budget and she has been reduced to shut-in status* (Individual’s budget affected; Decrease in community integration)
- *Difficulty getting Goods and Services providers paid* (Delay in service delivery or service payment)

- *People want to be hired within a reasonable time. The process takes way too long. They need to be paid as much as any agency gets, if not more. We need dedicated people who get a fair pay (Hiring/onboarding/training staff)*
- *It hasn't resulted in any of these. I do notice however, Easter Seals does not follow the SDRs as approved. They will sometimes overpay SDEs and then the budget needs to be adjusted. (Individual's budget affected)*
- *Patient spirit (Other)*
- *It depends on the issue. Sometimes there is a joint policy issue with DDD and Easter Seals. Sometimes these issues take months to resolve as these issues are much more complicated (Other)*
- *loss of confidence that Easterseals is a professionally-run organization (Other)*

**Figure 12: Has the recent changes to employee benefits at Easterseals negatively affected the ability to obtain or/and retain staff? If so, in what way?**

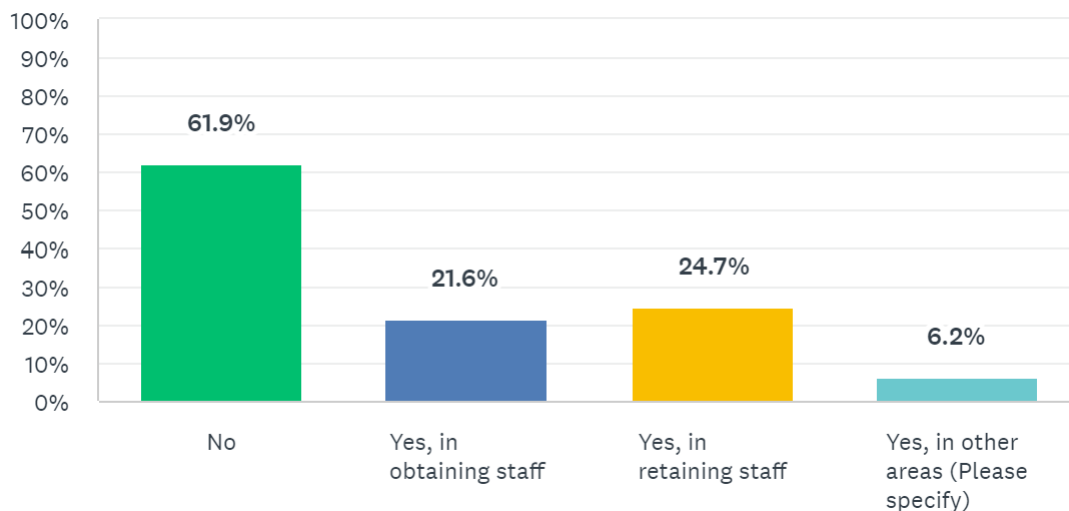


Figure 12 asked the respondents how Easterseals' recent changes in their employee benefits negatively affect their ability to obtain or/and retain staff. There were 97 responses, 60 (61.9%) reported that the recent changes to employee benefits did not negatively affect the ability to obtain or/and retain staff; 24 responses (24.7%) had difficulty retaining staff; and 21 responses (21.6%) had difficulty obtaining staff. 6 respondents said that the changes did have an effect other than obtain and/or retain staff. Their responses can be seen below.

Below are the other response:

- *This is not a change in employee benefits, but a change in mileage reimbursement. Eliminating the separate mileage reimbursement under FFS has had a dramatic negative impact on obtaining and retaining staff.*
- *staff was not happy about having their PTO reduced. It affects moral. (sic)*
- *They need to give more PTO time as they did before and bring back all 10 holidays*
- *The training is ridiculous no one wants to go Thru (sic) all of that*
- *Very disrespectful how it was worded "to support Scheduling challenges for our Manager Employers"*
- *Illegally enforced requirements*



**Figure 13: How satisfied with fiscal management services from Public Partnerships (PPL)?**

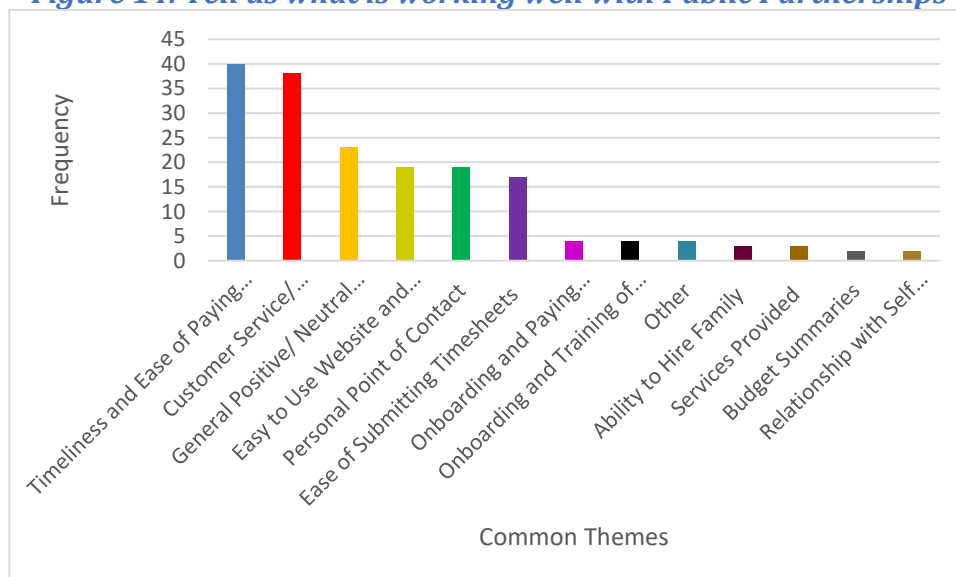


**Table 7: Satisfaction of PPL Services**

<b>Rating</b>	<b>Number of Response</b>	<b>Percentage</b>
<i>Extremely Dissatisfied</i>	44	18.6%
<i>Somewhat Dissatisfied</i>	51	21.6%
<i>Neutral</i>	45	19.1%
<i>Somewhat Satisfied</i>	52	22.0%
<i>Extremely Satisfied</i>	44	18.6%
<b>Total</b>	<b>236</b>	
<b>Weighted Average (out of 5 stars)</b>	<b>3.00</b>	

Figure 13 and Table 7 represent the 236 respondents' satisfaction with PPL and the weighted average of those responses. PPL weighted satisfaction rating was 3.00 stars out of 5 stars. Out of 236 responses, 52 (22.0%) reported being somewhat satisfied, 51 (21.6%) were somewhat dissatisfied, and extremely dissatisfied and extremely satisfied were equally represented with 44 responses (18.6%). An additional 45 respondents (19.1%) reported being neutral on PPL.

**Figure 14: Tell us what is working well with Public Partnerships**



*Table 8: Tell us what is working well with Public Partnerships*

<b>Common Themes</b>	<b>Frequency</b>
Timeliness and Ease of Paying Staff	40
Customer Service/Communication	38
General Positive/ Neutral Response	23
Easy to Use Website and Smartphone App	19
Personal Point of Contact	19
Ease of Submitting Timesheets	17
Onboarding and Paying Vendors	4
Onboarding and Training of New Staff	4
Other	4
Ability to Hire Family	3
Services Provided	3
Budget Summaries	2
Relationship with Self Directed Employees	2
<b>Total</b>	<b>178</b>

There were 178 responses to Question 14, which asked respondents what was going well with PPL. However, 39 responses were omitted from the data analysis because they highlighted negative experiences with PPL and 5 additional comments contained both positive and negative components. These negative experiences have been moved to Question 22, which allowed respondents to provide additional comments and concerns related to fiscal intermediary services, and have been reflected in that question's data analysis. As a result, Figure 14 and Table 8 represent the remaining 139 positive or neutral responses about PPL.

There were 139 responses, 40 were about the accuracy and ease of paying staff, 38 mentioned positive customer service and communication with PPL staff, 23 responses were positive or neutral experiences without elaboration. Additionally, 19 responses pertained to the user-friendliness of the website and smartphone app, 19 appreciated the having a personal point of contact within PPL, and 17 expressed that submitting timesheets was efficient and easy. The final responses were regarding onboarding and paying vendors (4 responses), onboarding and training new staff (4), the ability to hire family (3), the services that PPL provides for individuals with disabilities (3), the availability of budget summaries (2), and the relationship between the individual with disabilities

and their SDE (2). There were 4 responses that did not fit into the categories listed above and were labeled as “other”.

Below are some responses that represent the common themes:

- *Generally, PPL works well now. Everyone is paid on time. Timesheet system working including APP based* (Timeliness and Ease of Paying Staff, Ease of Submitting Timesheets, Easy to Use Website and App)
- *I like the ability to pay staff a better wage (it is still too low to retain good people) Agencies have no staff, the ones they do not show up, or quit after one day* (Timeliness and Ease of Paying Staff)
- *We have a wonderful consultant currently who is knowledgeable, helpful with a positive, reassuring manner. She always responds quickly. Entering hours on the computer mostly works fairly well although it does have glitches that sometimes takes awhile to resolve. In these cases, ppl will extend submission deadlines. I'm glad ppl lets us use the computer rather than cell phone. Not everyone has a smart phone.* (Personal Point of Contact, Customer Service/Communication, Easy to Use Website and Smartphone App)
- *It is very efficient and the staff is very responsive and helpful.* (Customer Service/Communication)
- *Having a personal representative to help with the paperwork by phone or by home visit.* (Personal Point of Contact)
- *getting hours approved and checks paid works smoothly* (Ease of Submitting Timesheets)
- *It is a big plus that family members living with the disabled individual can be paid for caring for them* (Ability to Hire Family)

**Figure 15: In which areas have you had issues with Public Partnerships (PPL)?**

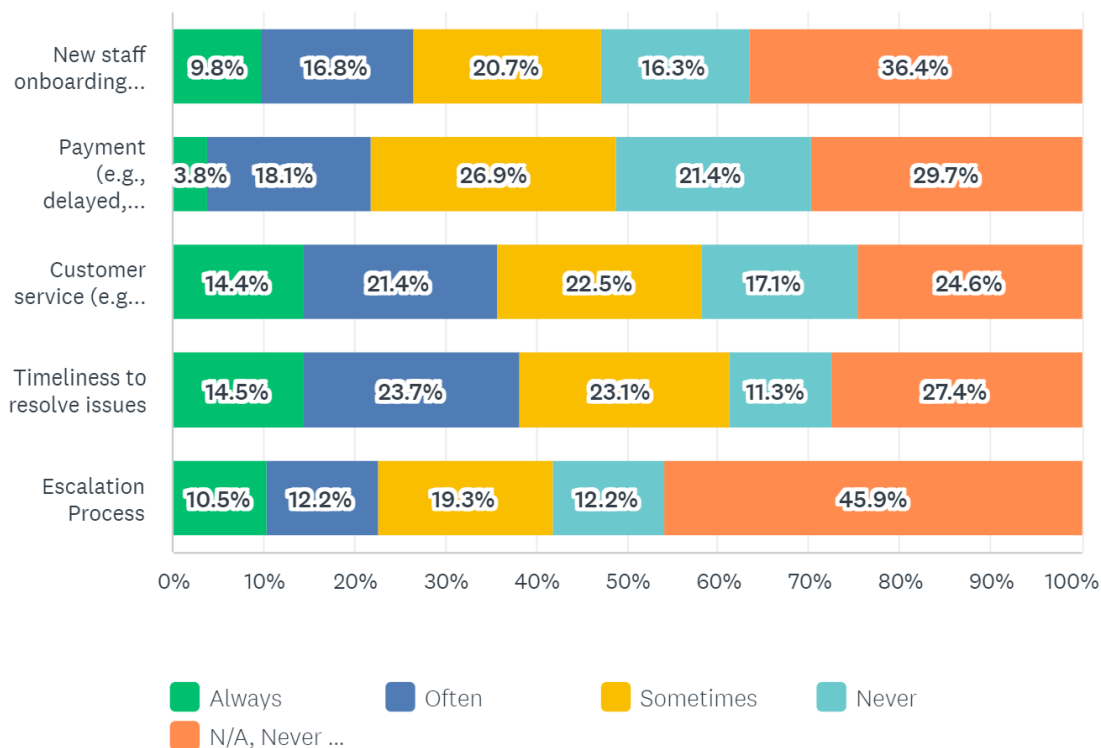


Figure 15 represents 5 common areas that families experience issues: onboarding new staff, paying staff, customer service, timeliness to resolve issues, and the escalation process. There were 191 responses to this question, but not all respondents answered all the questions.

**New Staff Onboarding:**

There were 184 total responses, 67 respondents (36.4%) reported staff onboarding issues are not applicable, 38 respondents (20.7%) sometimes have an issue, 31 respondents (16.8%) often have an issue, 30 respondents (16.3%) never have an issue, and 18 respondents (9.8%) always have an issue.

**Payment:**

There were 182 total responses, 54 respondents (29.7%) reported an issue with payment is not applicable to them, 49 respondents (26.9%) sometimes have an issue, 39 respondents (21.4%) never have an issue, 33 respondents (18.1%) often have an issue, and 7 respondents (3.8%) always have an issue.

**Customer Service:**

There were 187 total responses, 46 respondents (24.6%) reported an issue with poor customer service is not applicable to them, 42 respondents (22.5%) sometimes have an issue, 40 respondents (21.4%) often have an issue, 32 respondents (17.1%) never have an issue, and 27 respondents (14.4%) always have an issue.

**Timeliness to Resolve Issues:**

There were 186 total responses, 51 respondents (27.4%) reported an issue with timeliness in resolving issues is not applicable to them, 44 respondents (23.7%) often have an issue, 43 respondents (23.1%) sometimes have an issue, 27 respondents (14.5%) always have an issue, and 21 respondents (11.3%) never have an issue.

**Escalation Process:**

There were 181 total responses, 83 respondents (45.9%) reported an issue with the escalation process is not applicable to them, 35 respondents (19.3%) sometimes have an issue, 22 respondents (12.2%) never have an issue, 22 respondents (12.2%) often have an issue, and 19 respondents (10.5%) always have an issue.

**Figure 16: Have you used the escalation process?**

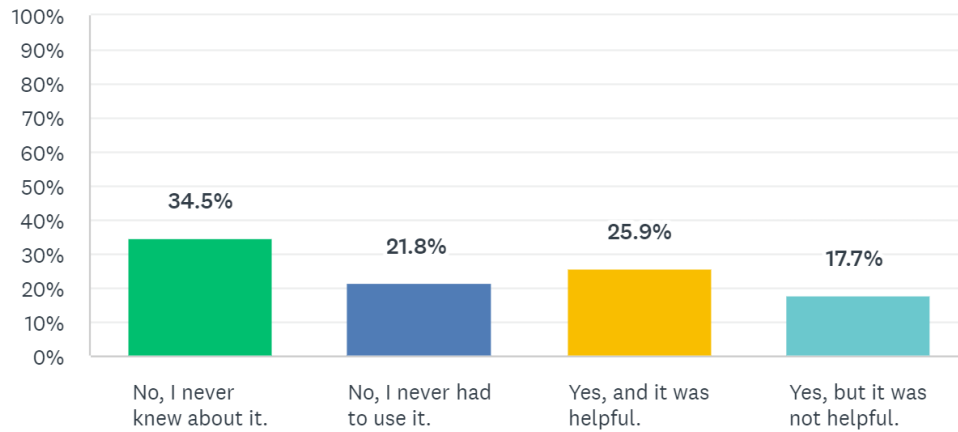


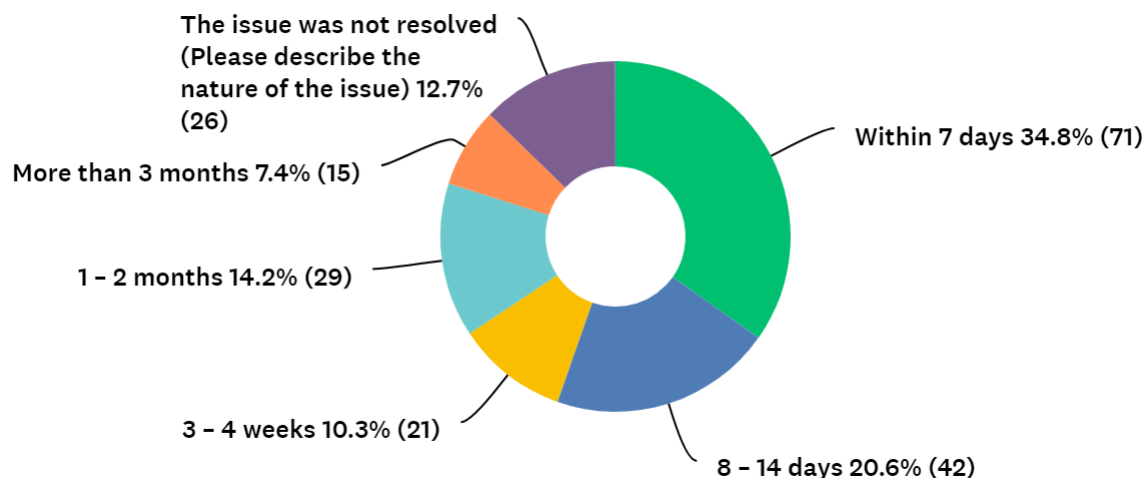
Figure 16 asked respondents about their experience with the escalation process. There were 220 responses, 76 (34.5%) reported never knowing about the escalation process, 57 (25.9%) used the process and found it helpful, 48 (21.8%) never had to use it, and 39 (17.7%) used the process and did not find it helpful.

*Table 9: Average number of times Public Partnership was contacted to resolve one issue?*

<b>Times Needed to Call</b>	<b>Frequency</b>
3	35
2	33
0	24
1	23
4	22
5	21
10	12
6	8
7	5
8	5
11	3
20	3
9	2
12	2
25	2
15	1
17	1
21	1
30	1
40	1
46	1
48	1
50	1
59	1
71	1
90	1
91	1
<b>Total</b>	<b>212</b>

Table 9 represents that average number of times PPL needed to be contacted to resolve one issues. There were 212 responses, the most common responses were: 3 times (35, 16.5%), 2 times (33, 15.6%), 0 times (24, 11.3%), 1 time (23, 10.8%), 4 times (22, 10.4%), and 5 times (21, 9.9%). The average number of times that PPL had to be called was 7 times.

**Figure 17: On average, how long did it take the issues to be resolved?**

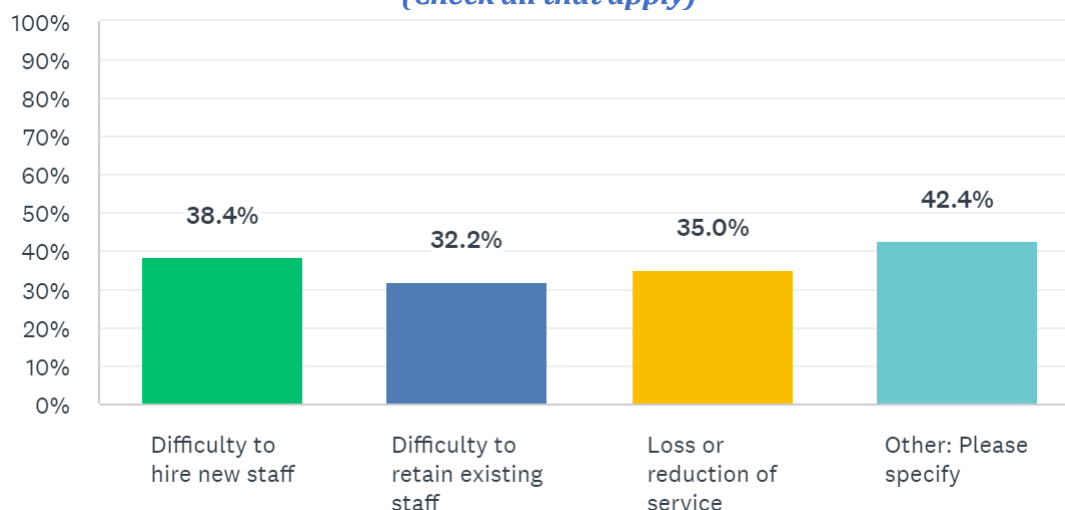


**Table 10: Issue was not resolved**

Issue	Frequency
No Issues	6
Waiting for Resolution	5
Delay in Onboarding	4
Staff Payment/Benefit Issues	4
Failure to Pay Taxes	2
Change in Employer of Record	1
Delay After Insurance Change	1
Delayed Payment to Vendors	1
Don't Know Timeframe	1
EVV issues	1
Lack of Budget Summary Explanations	1
Website Login	1

Figure 17 asked how long PPL typically took to resolve an issue. Out of 204 responses, 71 (34.8%) reported that issues were resolved in 7 days, 59 (24.8%) had their issues resolved in 2-4 weeks, 36 (15.1%) had to wait less than 2 weeks, and for 34 (14.3%) said it took more than 3 months. An additional 26 respondents (12.7%) did not have an issue resolved and elaborated on the issue. Of the 26 responses, 6 said they never had an issue, 5 were waiting on a resolution to their issue, 4 reported a delay in the onboarding process for their staff, and 2 were concerned about PPL failure to pay quarterly taxes. Each of the following themes received 1 response: a delay in changing the employer of record, a delay in payment after changing insurance, a delay in payment to vendors, not knowing exactly how long it took to resolve the issue, electronic visit verification issues, a lack in explanation of the budget summary, and an issue changing the password to log into the website. (See Table 10)

**Figure 18: How do you think the issue negatively affected the individual(s) with disabilities?  
(Check all that apply)**



**Table 11: Negative Affect on Individual with Disabilities**

Issue	Frequency
No Affect	35
Affected the Family	17
Payment and Budget Issues	15
Affects Hired Staff/ Providers	9
Difficulty Hiring and Onboarding Staff	5
Quality of Life for Individual	5
Poor Communication	4
All of the Above	1
Website and Sign On Issues	1
<b>Total</b>	<b>92</b>

Figure 18 represents how any issues affected the individual(s) with disabilities that use PPL as a fiscal intermediary. Although there were only 177 responses, respondents were able to select multiple choices. As a result, the number of responses and percentages are higher.

There were 68 respondents (38.4%) who reported the issue they experienced made it difficult to hire new staff, 62 (35.0%) experienced a loss or reduction of services, and 57 (32.2%) had difficulty retaining existing staff. Additionally, there were 75 “other” responses, of which, 35 said either there was no issue or that the issue did not affect the individual(s) with disabilities, 17 described how the issue affected the family, 15 explained how the payments and the individuals(s)’ budgets were affected, and 9 described how the issues affected hired staff and providers. There were 5 responses pertaining to the difficulty in hiring and onboarding staff, 5 responses highlighted how the individual(s) quality of life was affected, and 4 responses explained how the issues create poor communication between PPL and families. There was one response for the individual be affected in all of the above listed ways and 1 response on how the issue affected the hired staff’s ability to sign-on to the website.



Below are some responses that represent the common themes:

- *Anxiety producing, fear of what will happen next, uncertainty of the new hired staff, unknow(sic) who will be the fiscal coordinator, Unexplained changes*(Poor Communication; Affected the Family)
- *How about the negative affect to the Provider Agency? We cannot stay in business if it is impossible to receive payment due to issues.* (Payment and Budget Issues; Affects Hired Staff/Providers)
- *My concern in maintaining a(sic) average quality of life and living, because I depend on them 90% of basic needs* (Quality of Life for Individual)
- *Hiring is not a smooth process. Information does not get processed as it should* (Difficulty Hiring and Onboarding Staff; Poor Communication)
- *Problems signing in due to password issues* (Website and Sign On Issues)
- *Since our son lives with us- of course we continued to care for him despite payment issues* (Payment and Budget Issues; Affected the Family)

**Figure 19: How long does it take to complete the new staff onboarding process?**

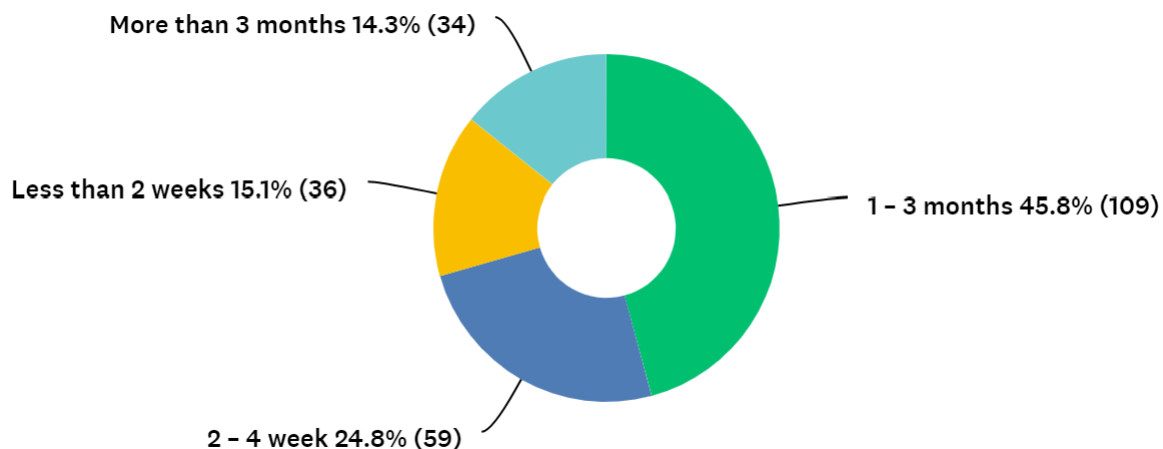
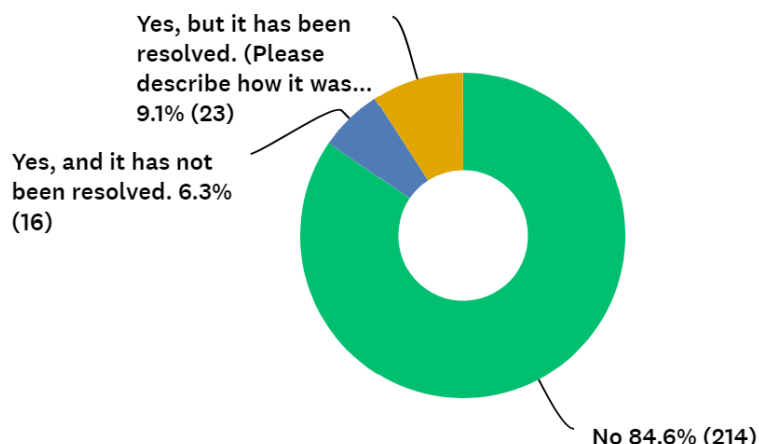


Figure 19 asked how long it took families to onboard new staff. There were 238 responses, of which, 109 (45.8%) said onboarding new staff took 1-3 months, 59 (24.8%) said it took 2-4 weeks, 36 (15.1%) reported less than 2 weeks, and 34 reported more than 3 months.

**Figure 20: Have you experienced any issues with Employment Identification Number (EIN?)**



**Table 12: EIN Issue Resolution**

Common Themes	Frequency
Resolved	5
NJ Tax Bureau Involvement	4
Correct Information Provided	3
Not Applicable	3
New EIN Identified	2
Other EOR Used	2
PPL Involvement	2
Prior EIN Used	1
Stayed With Easterseals	1
<b>Total</b>	<b>23</b>

Figure 20 represents if families had an issue with their Employment Identification Number (EIN). There were 253 responses, 214 (84.6%) reported not having any issues with the Employee Identification Number, 16 (6.3%) have had an issue and it was not resolved, and 23 (9.1%) did have an issue, but it was resolved. Table 12 contains the common themes for how the 23 individuals resolved the Employee Identification Number issue. Five responses said that it took a long time, but the issue resolved itself or that the issue was resolved without further explanation. Four responses explained how the NJ Tax Bureau was involvement in the process by sending delinquent tax forms, contacting the families claiming they owed money, or that they were constantly receiving communications from the state about their lack of payment. Another 3 responses said that the issue resolved after they received accurate information from PPL on what to do. The final ways the EIN issues were resolved were obtaining a new EIN (2 responses), the use of another Employee of

Record (2 responses), PPL handled the issue (2), another EIN was used (1 response), and staying with Easterseals to avoid the issue (1 response).

Below are some responses that represent the common themes:

- *I was sent Delinquent Tax documents because they reported me as the employer. (NJ Tax Bureau Involvement)*
- *I had to coordinate getting another EIN (New EIN Identified)*
- *The tax information comes directly to us at times but it is resolved after forwarding it to PPL (PPL Involvement)*
- *took months and finally got accurate info from PPL- originally given wrong info (Correct Information Provided)*

**Table 13: Do you have any comments or concerns about Fiscal Intermediary Services?**

<b>Common Themes</b>	<b>Frequency</b>
Negative Customer Service Experience/ Poor Communication	78
Financial Concerns	47
General Negative Experience	42
Issues Onboarding and Training New Staff	30
No Additional Comment	26
Issues Using Available Technology	23
High Turnover Rate for PPP/PPL Staff	15
Accessing Services	14
General Positive Experience	14
Support Coordinators' Role Interacting with FIS	9
Accessing Timesheets and Budget Summaries	9
Availability of Personally Assigned Contact	8
Positive Customer Service/ Good Communication	8
DDD/DMAHS Accountability and Customer Service	6
Need for Other Fiscal Intermediaries	6
Other	6
Escalation Process Needed	5
Positive Experience Onboarding and Training New Staff	2
<b>Total</b>	<b>348</b>

There 224 responses regarding additional comments or concerns about respondents' experiences with Fiscal Intermediary Services. Multiple comments addressed several important themes and were counted multiple times, which increased the total responses. The most common theme

addressed was the lack of customer service and communication from Easterseals and PPL when there are problems or questions (78 responses). Next, 47 comments mentioned financial concerns, such as timely payments, incorrect billing of providers, not taking proper tax amounts out of pay, and inconsistent benefits. An additional 42 responses said they had a negative experience with Easterseals or PPL without elaborating. Thirty responses discussed the issues they faced onboarding and training new staff, such as the length of the process or excessive amount of paperwork required and lost. Additionally, 26 respondents did not have any further comments to add; 23 responses explained the challenges they are facing using the websites, smartphone apps, and data entry systems available through Easterseals and PPL; and 15 responses discussed the high turnover rate for case managers, nurses, and consultants through PPL. The challenges individuals with disabilities experience accessing services, such as the barriers to enrolling service providers or the fiscal intermediaries not approving service in an appropriate amount of time, was mentioned on 14 individual responses. Another 14 responses said they had a positive experience with their fiscal intermediary without explaining further. Nine responses discussed the role of support coordinators in the fiscal intermediary process, which includes calling when there are issues that need to be resolved, following up on the onboarding process, and fielding customer service questions that Easterseals' and PPL's staff could not answer. The need for families to have a single point of contact to call when they have issues and the positive customer service and good communication experienced, were both mentioned in 8 responses. The remaining themes mentioned include: DDD/DMAHS' poor customer service when families call for assistance (6 responses), the need to explore other fiscal intermediary options (6 responses), the need to use the escalation process (5 responses), and the positive experience onboarding and training new staff (2 responses). There were 6 comments that did not pertain to the common themes listed and were labeled as "other".

Below are some responses that represent the common themes:

- *Due to constant change over in staff, not being notified you have a new consultant, appointments are not cancelled when a consultant leaves or reassigned. there are no emails phone contact no shows When a new consultant makes contact the insistence of an immediate appt or reminder of possible of loss of services...(Negative Customer Service Experience/Poor Customer Service, High Turnover Rates for PPP/PPL Staff)*
- *But, PPL has no customer service who can even answer the simplest question. Their appeal-deescalation unit could not answer simple questions, and said there was no further appeal or manager I could speak with. (Negative Customer Service Experience/Poor Communication)*
- *However, onboarding the AWC was a little rough for my staff because no one really knew the system well enough to explain how to login their time into the new system. As a result, my staff didn't receive pay for about three months. This isn't right. (Negative Customer Service Experience/ Poor Communication, Financial Concerns, Issues When Onboarding and Training New Staff, Issues Using Available Technology)*
- *The problem for me is the time it takes to approve a goods and services request. Right now I have a request waiting approval that has been waiting about 8 days. The request will be denied if it passes the start date and there is no approval. When they kick it back, they won't even acknowledge that they waited too long to approve the services. I just had this happen last month and the same individual is currently waiting for services to be approved. I will be escalating this but I'm not sure the outcome, some times [sic] they take a while to respond.*

(Negative Customer Service Experience/Poor Communication, Escalation Process Needed, Accessing Services)

- *They send request for employees required documentation that has already been submitted. Then you call and the representative doesn't have access to info to help. Then you finally get someone who says everything fine ignore phone call.* (Negative Customer Service Experience/Poor Communication, Issues When Onboarding and Training New Staff)
- *I do not like it from a support coordinator's point of view, or for billing purposes. They change rules and deny claims based off of it. Providers don't know what to expect unless they call.* (Financial Concerns, Accessing Services)
- *Just need to find a new way to put in timesheets versus writing them. Employees not getting paid and not receiving calls if they are missing. They pick and choose when to call. effects staffs pay* (Negative Customer Service Experience/Poor Communication, Financial Concerns, Accessing Timesheets and Budget Summaries)
- *The timeline for on-boarding new staff must be improved. We lose new staff hires due to the extensive time frames and difficulties with On-boarding emails being received. Even the "Emergency On-boarding Protocol" has delivered little to no improvement when on-boarding new staff when hiring thru PPL or ES.* (Issues Onboarding and Training New Staff, Issues Using Available Technology)
- *When assigned a staff person, that person should be readily available and respond with 24 hours. When changing staff members, a new member should be put in place and available within 24 hours of the change. change in staff and inability to contact staff.* (Availability of Personally Assigned Contact, Negative Customer Service Experience/Poor Communication, High Turnover Rates of PPP/PPL Staff)
- *Statement is far too complicated for guardians and service providers. This results in many service providers not wanting to participate, and many individuals not getting the services they need or want.* (Financial Concerns, Accessing Services)
- *...Usually the initial response from PPL is to contact our support coordinator only to be told by the SC to call PPL. It is very frustrating...* (Support Coordinators' Role Interacting with FIS)
- *With Easterseals as an SC you get to see the onboarding process, since we are copied on all emails. It becomes confusing, but at least you have some awareness, and you have a contact via email that you can respond to. With PPL, you have absolutley [sic] NO idea where the process stands, who you can contact, or when things are being done... As an SC I feel that with PPL we have to do a lot of chasing up of status of onboarding, and we get told if we can just as the family to do this or that...* (Support Coordinators' Role Interacting with FIS)
- *...Need to be able to see Need to get to older, past time sheets more easily and quickly. Need to see how many hours of month are used as you go on. Need to see clearer explanation of why something is denied* (Issues Using Available Technology, Accessing Service, Accessing Timesheets and Budget Summaries)
- *... Overall, Easter Seals continues to do a great job at assisting families. We have been with them for 13 years, long before the change to FFS. They are pleasant, hard working and try hard to obtain answers if they don't have them readily available...* (Positive Customer Service/ Good Communication)
- *Yes, to whom are they accountable? Why doesn't DDD/DMS hold them to greater accountability? Where do we turn when PPL is unresponsive?* (DDD/DMAHS Accountability and Customer Service)

- *They are increasingly destructive and have caused critical reduction in my sister's quality of life and all of this as a result of having her leg broken in a DDD run group home. They are deliberately causing us stress and loss of services and budget access. They have to lose this contract because they are incapable of administrating it. (Financial Concerns, Accessing Services, Need for Other Fiscal Intermediaries)*

## Recommendations

DDAN Person-Centered and Self-Directed Services Committee recommends as follows.

1. The State adds more fiscal intermediary agencies so that individuals and families have more choice
  - a. The quality of service provided by fiscal intermediaries can be improved by promoting healthy business competition among providers. In addition, families should have more choice in who they can hire and how they pay their staff, which other fiscal intermediaries would be able to offer.
2. Both Easterseals and Public Partnerships, LLC improve their customer service and shorten the time to resolve issues.
  - a. Many respondents commented on the lack of customer service that they have received when calling Easterseals and Public Partnerships, LLC. The most comment complaints are that agencies are not returning calls or messages; they are providing inaccurate information; or, the staff are rude on the phone.
  - b. Additionally, families often have time-sensitive issues regarding paying their staff or accessing services, but the fiscal intermediaries are taking upwards of three months to address issues. The delay in resolving issues results in higher staff turnover rates and the inability for families to hire new staff in a timely manner. Ultimately, the challenges prevent families for families and providers from providing the best care for their loved ones.