

J.L. MORGAN & Associates, Inc.

Information Packet

Summation

In 2005, J.L. Morgan & Associates was established to provide organizations with the ability to track and report how their organization is performing relative to the patient experience. With this thought in mind, we developed the foundation of what we stand for and what we believe. Our focus has been on delivering cost-effective, quality service, and timely data driven results for our clients across the nation.

CAHPS® - Consumer Assessment of Hospital Providers and Services

- CG CAHPS (Clinician & Group)
- ED CAHPS (Emergency Department)
- HCAHPS (Hospital)
- HHCAHPS (Home Health)
- OAS CAHPS (Outpatient and Ambulatory Surgery)

Additional Services and Programs

- Discharge Outcome (Post Discharge Follow Up Call)
- ED Discharge Outcome (Post ED Discharge Follow Up Call)
- Patient Satisfaction
- Culture of Safety
- Employee Morale
- Physician Satisfaction
- Facility Specific Surveys

Conducting telephone administered surveys and web-based (email) surveys; J.L. Morgan & Associates, Inc. provides real time data for our partner organizations. J.L. Morgan & Associates, Inc. unique and proprietary software was written and created exclusively to provide each organization, a statistically sound method of determining, tracking, and bench marking all necessary data.

Currently contracting our services to facilities across the nation; J.L. Morgan & Associates, Inc. benchmarks data by national percentages (as applicable), state, or entire database. Surveys and methodology are JCAHO and HIPAA Compliant. We are a CMS approved vendor and have a rapidly growing database.

We are efficient, providing immediate return on investment.

Our company is well seasoned in conducting HCAHPS, HHCAHPS, ED CAHPS, OAS CAHPS, CG CAHPS, Patient Satisfaction, Employee Morale, Discharge Outcome, ED Discharge Outcome, and Culture of Safety surveys. J.L. Morgan & Associates, Inc. operates with multiple surveyors and managers specializing in each area, while maintaining an audit and data department to ensure quality of care for our client hospitals. We are experiencing rapid growth and intend to be the leader in our industry.

Services / Products

HCAHPS –Vendors must be certified by CMS to conduct these surveys on the hospital’s behalf. J. L. Morgan & Associates, Inc. is a CMS approved survey vendor. Our database HCAHPS average is almost 10% higher than the national average.

HHCAHPS – Beginning in October 2010, Home Health agencies were required by CMS to participate in HHCAHPS surveys. Vendors must be certified by CMS to conduct these surveys on the Home Health agencies behalf. J. L. Morgan & Associates, Inc. is a CMS approved survey vendor. Survey vendors are very important for home health agencies, because per CMS, Home Health agencies are not permitted to conduct their own HHCAHPS surveys.

CGCAHPS – This survey evaluates the patient’s experience with physicians and their office staff in a clinic setting and is known as the Clinician & Group Survey. This survey is designed to capture numerous patient responses involving communication and care provided by health care providers and office staff, preparation for surgery or procedure, and post-surgical care coordination.

OAS CAHPS – This survey began in January 2016 and designed to evaluate the patient care experience for hospital-based outpatient departments (HOPD’s) and ambulatory surgery centers (ASC’s). Starting in January 2024, mandated reporting will be required for HOPD’s and in January 2025 for ASC’s. The survey will cover topics such as professionalism of the staff, communication with the patient before and after the procedure, and preparations during the discharge process. As with all CAHPS® surveys, CMS will also evaluate overall satisfaction and the likelihood the patient would recommend the facility to friends and family.

Discharge Outcome (Discharge Call Follow Up) – J. L. Morgan & Associates, Inc. will attempt to contact 100% of the hospital’s “inpatient” discharged patients within 24 – 72 hours once data is received. A JL Morgan clinical team member will assess the patient’s health condition, compliance with medication regimen, physician office follow-up, and discharge instructions. Our clinical team surveyor will document patient comments throughout the survey. The patient will also be given an opportunity to recognize excellent team members that impacted their care via patient comments. Should a patient be deemed “non-compliant” in any area, the hospital will be sent a “patient alert email”. At all times the organization will have access to the system and can view results in “real-time”.

ED Discharge Outcome (Discharge Call Follow Up) – J. L. Morgan & Associates, Inc. will attempt to contact an agreed upon target number of the hospital’s “ED” discharged patients within 24 – 72 hours once data is received. Surveyor will assess the patient’s compliance with discharge orders, medication regimen, physician office follow up, along with accessing the patient’s satisfaction with the quality of care provided while under inpatient emergency department care. Should a patient be deemed “non-compliant” in any area, the hospital will be immediately contacted via a “patient alert email”.

Patient Satisfaction – J. L. Morgan & Associates, Inc. produces real time data pertaining to patient satisfaction for our partner facilities. Patient Satisfaction survey scores can be benchmarked in our database by bed size, facility location, or entire database.

Behavioral Health – The importance of gauging a patient’s satisfaction in behavioral health for both Geriatric and Adults is vital to determining how an organization is performing. J. L. Morgan & Associates, Inc. produces realtime data pertaining to patient satisfaction for our client organizations.

Specialized Employee Surveys - J. L. Morgan & Associates, Inc.’s software enables the employee to complete specialized employee surveys such as employee separation, morale, and satisfaction. Immediately upon completing the secured internet survey, the employee's responses are automatically populated into the client's database, whereby providing the client with immediate and unlimited database access to all data collected.

Culture of Safety – During late 2004, the Agency for Healthcare Research and Quality (AHRQ) released a survey tool that would specifically assess the safety culture of a hospital. The Culture of Safety survey provided by J. L. Morgan & Associates, Inc. is designed to assist the hospital client with creating a culture in which patient safety is an innate behavior.

Customized Surveys – Along with the vast array of products mentioned, J. L. Morgan can also develop customized surveys to meet our client’s needs. These can be developed in-house with assistance from your leadership team focusing on identified goals and objectives.

J. L. Morgan Database

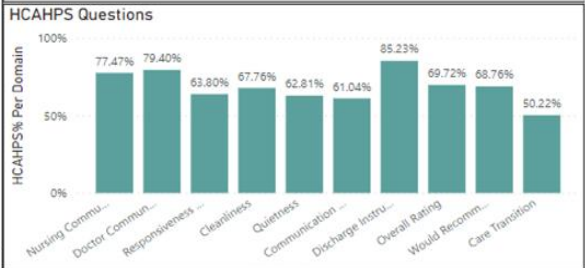
J. L. Morgan’s proprietary database allows our clients to access to their data in real-time. There are no limits on the number of user accounts. Within our platform, JLM Solutions reports, patient responses are presented in terms of ‘top-box’ responses. What this means is that, for a question with three possible responses (i.e., ‘Yes, definitely,’ ‘Yes somewhat,’ or ‘No’), it would display what percentage of the total respondents answered the most positive response choice possible.

Information is presented as quarterly data based on calendar year, as well as through custom date ranges input by the user. This data can be drilled down further by patient demographics, such as age, gender, survey language, etc. There are several comparative analysis tools available, including PowerBI, as well as a comparison to national benchmarks provided through CMS’ Data Catalog. One of our newest reports provides a Net Promoter Score (NPS) for the facility to measure overall patient satisfaction and compares it with similar facilities within your area of the country, similar bed size, or a combination.

Report Examples:

Category	Quarter 1		Quarter 2		Quarter 3		Quarter 4	
	CAHPS%	Percentile	CAHPS%	Percentile	CAHPS%	Percentile	CAHPS%	Percentile
	N = 8948		N = 9235		N = 8131		N = 7964	
Nursing Communication	78.56 %	< 50th	78.96 %	< 50th	78.16 %	< 50th	77.17 %	< 50th
Doctor Communication	81.19 %	< 50th	81.12 %	< 50th	80.11 %	< 50th	79.29 %	< 50th
Responsiveness of Staff	68.29 %	50th - 75th	70.31 %	50th - 75th	66.15 %	< 50th	65.90 %	< 50th
Communication Medications	66.90 %	50th - 75th	69.00 %	50th - 75th	64.62 %	< 50th	64.17 %	< 50th
Cleanliness	68.55 %	< 50th	68.97 %	< 50th	68.93 %	< 50th	68.41 %	< 50th
Quietness	64.39 %	< 50th	65.15 %	< 50th	64.05 %	< 50th	63.53 %	< 50th
Discharge Instructions	87.38 %	< 50th	88.89 %	< 50th	86.05 %	< 50th	86.96 %	< 50th
Overall Rating	71.41 %	< 50th	71.53 %	< 50th	70.74 %	< 50th	69.79 %	< 50th
Would Recommend	71.83 %	< 50th	72.03 %	< 50th	70.14 %	< 50th	69.78 %	< 50th
Care Transition	52.67 %	50th - 75th	52.85 %	50th - 75th	50.66 %	< 50th	50.35 %	< 50th

	July	August	Volume
			2609
Category	CAHPS % LastMonth	CAHPS % This Month	CAHPS % Change
Nursing Communication	78.66%	77.47%	-1.19%
Nursing Courtesy and Respect	83.45%	82.42%	-1.03%
Nursing Explanation	75.38%	73.85%	-1.53%
Nursing Listening	77.15%	76.15%	-1.00%
Doctor Communication	80.19%	79.40%	-0.79%
Doctor Courtesy and Respect	84.99%	84.26%	-0.73%
Doctor Explanation	76.67%	75.22%	-1.45%
Doctor Listening	78.90%	78.73%	-0.17%
Responsiveness of Staff	67.25%	63.80%	-3.45%
Responsiveness to Bathroom Assistance	71.27%	65.79%	-5.48%
Responsiveness to Call Button	63.24%	61.81%	-1.43%
Cleanliness	69.87%	67.76%	-2.11%
Cleanliness of Room and Bathroom	69.87%	67.76%	-2.11%
Quietness	64.42%	62.81%	-1.60%
Quietness at Night	64.42%	62.81%	-1.60%
Communication Medications	68.25%	61.04%	-7.22%
Medication Explanation	78.22%	71.87%	-6.35%
Medication Side Effects	58.28%	50.20%	-8.08%
Discharge Instructions	87.24%	85.23%	-2.01%
Discharge Help After Stay	84.78%	83.10%	-1.68%
Discharge Symptoms Information	89.70%	87.36%	-2.34%
Overall Rating	72.24%	69.72%	-2.51%
Overall Rating	72.24%	69.72%	-2.51%
Would Recommend	71.63%	68.76%	-2.87%
Recommendation	71.63%	68.76%	-2.87%
Total	71.42%	68.97%	-2.45%



Why Choose J. L. Morgan?

Trusted Leader in Healthcare Research

J. L. Morgan has been a trusted and established patient satisfaction and CAHPS® vendor for over 17 years. We have been a certified CMS vendor for CAHPS® surveys since their inception in 2008.

Cost Efficient

J. L. Morgan was founded on the belief that all organizations, regardless of their size or economic stature, deserve access to sound and secure quality data resulting in one of the leaders for providing patient satisfaction surveys at a reasonable cost for any organization.

Improved Response Rates

J. L. Morgan utilizes telephone and web-based (email) modes for conducting surveys for the majority services. We feel surveys conducted via telephone method expands on the 'personal touch' to patients, versus a paper or automated service when collecting information for hospitals and organizations. This personal touch also results in higher response rates as compared to national averages.

Customer Service

From our beginnings in 2005, when we only had a handful of clients, to now serving over 250 clients nationwide from Florida to Hawaii, J. L. Morgan takes great pride in our customer service. Our clients have the confidence that their concerns will not be met with a "1-800 'help line'", but direct phone numbers and contact information to department managers for any of our services.

"Compared to our previous vendor, J. L. Morgan always goes above and beyond our needs in delivering fast and helpful customer service to their clients"

-J. L. Morgan Client

In our short time with your company, we have really enjoyed not only the great product you produce but also the exceptional customer service and care you provide. We are looking forward to a very long relationship with J.L. Morgan and Associates!

J. L. Morgan Client

We are experienced and dedicated to helping you achieve your goals. Let us know how we can help you in your journey for improved patient satisfaction.

Contact
Information

J.L. Morgan & Associates, Inc.

Jeff Morgan

CEO

7057 Meadowlark Drive

Birmingham, Al 3524

Jeff.morgan@jlm-solutions.com

Kristi Burgess DNP, RN

Director of Business Development

(205) 749-2781

Kristi.burgess@jlm-solutions.com

Latrice Lawson

Data Manager

(205) 749-2783

Latrice.lawson@jlm-solutions.com

Brooke Robinson

Marketing and Communications

(205) 937-4615

brooke.robinson@jlm-solutions.com

HCAPHS/HHCAHPS

Tanya Harris-Haynes

CMS CAHPS Director

(205) 749-2782

Tanya.harris@jlm-solutions.com

OAS CAHPS/ED CAHPS/CG CAHPS

Wendy Dew

Human Resources/CAHPS Director

(205) 749-2780

Wendy.dew@jlm-solutions.com

Discharge Outcomes

Cindy Widdig

Discharge Outcome/ED DO Director

(205) 749-0451

Cindy.widdig@jlm-solutions.com