

October 4, 2023

**Policy Letter 23-04**

To: Program of All-Inclusive Care for the Elderly (PACE) Organizations  
Subject: Integrated Satisfaction (I-SAT) Survey and Submission Requirements

### **Purpose**

The purpose of this policy letter is to require all PACE Organizations (PO) to participate in the I-SAT survey and submit the results of the I-SAT to the Department of Health Care Services (DHCS).

### **Background**

The I-SAT is a tool that was developed in 2009 by the California PACE Association (CalPACE) in partnership with Vital Research<sup>1</sup>. The tool has the ability to gather PACE participant's, family/caregiver's, and employee's satisfaction with the PACE program. The I-SAT tool is used to assess the quality of care for the PACE program in California on an annual basis. The I-SAT is administered by Vital Research. Upon completion of the data collection, Vital Research completes an analysis of collected data to produce reports that are delivered to POs.

The I-SAT provides actionable insights into the full range of services offered through PACE. The I-SAT is a tool that assists POs in identifying areas for improved performance and ongoing quality improvement activities. The I-SAT report presents cross-site comparisons, national benchmarks, and longitudinal analysis to assist POs in assessing their performance in comparison to other POs to identify areas of needed improvement.

### **Policy**

Effective January 2024, POs are required to submit the I-SAT Participant Satisfaction Report annually by January 31 of each calendar year.<sup>2</sup> The first I-SAT submission is due to DHCS by January 31, 2024.

New POs must reach out to Vital Research or CalPACE immediately after receipt of a fully executed contract from DHCS and establish a contract with Vital Research. New

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<sup>1</sup> [I-SAT | Home Care Assistance & Senior Care Services | CalPACE](#)

<sup>2</sup> See 42 C.F.R. §§ 460.130(d), 460.200(c), and 460.202; PACE Boilerplate Contract, Exhibit A, Attachment 1 ¶¶ 4.I and 4.J, Attachment 4 ¶ 1, Attachment 17 ¶ 1.A.5



POs are required to participate in the I-SAT Participant Satisfaction Report and begin submitting their results to DHCS upon meeting the following criteria:

- Processed new enrollments for a four-month period; AND
- Attained enrollment census of 50 participants.

POs will submit the I-SAT Participant Satisfaction Report as a portable document format (PDF) file through the PO's secure file transfer protocol (SFTP) using the "*DHCS-ISCD/Plans/[PO NAME]/Reports*" folder. The naming convention for the I-SAT Participant Satisfaction Report should be "*I-SAT Participant Satisfaction Report- PO NAME- YEAR*". Once the PO has submitted its report, the PO will send a notification email to its assigned contract manager and the back-up contract manager informing them that the report has been uploaded for DHCS' review.

At this time, DHCS is only requiring POs to participate in the I-SAT Participant Satisfaction Report. At a later date, DHCS may consider adding the Family/Caregiver and/or the Employee Satisfaction Report as a requirement.

### **Utilization of I-SAT Results**

The I-SAT Participant Satisfaction Report will be used by DHCS to assess PACE participant satisfaction and self-reported quality of services provided by POs in California in comparison to the national benchmarks and identify areas of improvement for California POs.

During the first calendar year, 2024, DHCS will collect I-SAT Participant Satisfaction Reports at the center level and at the organizational level from each PO meeting the criteria for participation. The first report is due by January 31, 2024. This will assist DHCS in determining which domains DHCS will assess to set compliance thresholds that POs will need to meet for subsequent reporting years. DHCS will focus its review on the overall summary score POs receive for each of the domains listed on the report.

DHCS will set the domains and associated thresholds that need to be met in calendar year 2025. If POs do not meet these thresholds by calendar year 2026, POs will receive a non-compliance letter and need to submit a Corrective Action Plan to DHCS within 30 days of receipt of the letter.

For new POs, the first year of contracting with Vital Research as a qualifying PO will be considered a baseline year used to identify areas of needed improvement for the following year. The second year as a qualifying PO contracted with Vital Research, the PO will need to meet the compliance thresholds identified by DHCS for the I-SAT Participant Satisfaction Report. The PO will need to submit a Corrective Action Plan to DHCS within 30 days of receipt of a non-compliance letter if the PO is determined to be deficient in meeting the established compliance thresholds identified by DHCS for the I-SAT Participant Satisfaction Report.

PACE Policy Letter 23-04  
October 4, 2023  
Page 3 of 3

If you have any questions regarding this policy letter, please contact the PACE Contract Manager inbox at [PACEContractManager@dhcs.ca.gov](mailto:PACEContractManager@dhcs.ca.gov).

Sincerely,

[Original document signed by]

Cortney Maslyn, Chief  
Integrated System of Care Division  
Department of Health Care Services