



Papa's 2023 Trust and Safety Roadmap

Description	Implementation Timing
Pillar 1: Increase the amount of training required for Papa Pals.	
Initiate a thorough cascade of communications within the first 30 days of acceptance and after a Papa Pal's first visit, arming new Pals with important information to improve their experience and improve safety. This series of nearly 30 briefings and 16 SMS touchpoints cover topics like: detail on getting started as a Papa Pal and ways to contact Papa; guidance on special populations, such as Veterans; and what to do in case of an emergency or safety incident. (Papa Pals have always received educational information via email post-onboarding; however, since last summer, we've significantly enhanced Pal training and education and more than doubled these touchpoints to new Papa Pals.)	Long-standing ▾
Turn more of the voluntary training currently offered into mandatory training that is now required. This additional mandatory training will include sexual and other workplace harassment, responding to emergency situations, and cultural competency during onboarding.	In progress post-safety review; complete by Q3 ▾
Initiate a study to determine the best means to enhance Papa Pal engagement.	'23 (post-safety review action) ▾
Established Papa Pal Advisors to provide useful, on-the-ground insights and ongoing feedback to inform content and decisions that affect the Papa Pal experience.	'23, prior to safety review ▾
Launched Papa Pal Central , a new one-stop-shop content hub with regular new content to further educate and support Papa Pals at all stages of their journey. We will continue to grow this content hub in H2.	'23, prior to safety review ▾
Formalized our Visit Standards , the expectations for Papa Pal behavior before, during, and after a visit to ensure a safe and enjoyable experience for everyone involved.	'23, prior to safety review ▾
Required onboarding training module on safety, types of tasks Papa Pals can and can't help with, support available via the Care	Long-standing ▾

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Team, pay, and steps for getting started, prior to gaining access to member visits on the Papa Pal platform.	
Required CMS fraud, waste, and abuse training, HIPAA and sensitive handling of personal information training, as well as general compliance training (required since Papa's founding).	Long-standing ▾
Before every visit, requirement to agree to and accept basic principles, including our Community Standards ; how to respond in case of an emergency; how to reach us if a Pal feels unsafe; and visit guidelines, like confirming with the member 24 hours in advance, carefully reviewing visit tasks and objectives, providing feedback after the visit, and never conducting a visit while under the influence of drugs or alcohol (updated earlier this year to include Community Standards).	Long-standing ▾
Offer targeted coaching and training when issues arise to continually uplevel Papa Pals.	Long-standing ▾
Provide access to FAQs and a resource hub about being a Papa Pal, as well as safety resources.	Long-standing ▾
Pillar 2: Add additional trust and safety expertise, internally and externally	
Establish a Safety Advisory Board comprised of four to five external experts (target profiles include experts across sexual harassment and domestic violence, elder care/home care, and emergency response).	In-progress post-safety review / into Q3 ▾
Ensure trust and safety has one leader who will report directly to the COO to centralize our talent, processes, policies, and oversight under a single leader. Recruitment has begun.	In-progress post-safety review / into Q3 ▾
Pillar 3: New in-visit and post-visit safety features	
Member/Papa Pal communication: Roll out more secure communication channels, such as number anonymization, without hindering the relationship-building that is central to our business.	'23 (post-safety review action) ▾
Member/Papa Pal communication: Enhance the secure handshake between members and Papa Pals by adding more identity verification tools to ensure the right Papa Pal is seeing	'23 (post-safety review action) ▾

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the right member.	
Emergency features: Improve emergency response features in the app, including a dedicated and highly visible emergency button (beyond the current ability to connect with a Papa Care Center agent from every screen) and improve the ability to report visit problems within the app.	'23 (post-safety review action) ▾
Pillar 4: Enhance Papa Pal screening	
Implement additional ongoing criminal monitoring (annual and continuous background checks) and continuous motor vehicle record checks for active Papa Pals to identify any new disqualifying offenses.	In-progress post-safety review / into Q3 ▾
Enhance the Papa Pal Vehicle Safety Program, including improving screening and monitoring related to transportation and vehicle safety standards.	'23 (post-safety review action) ▾
Implement additional identity verification checks to confirm Papa Pal identity (i.e., comparing driver's license to live photo).	'23 (post-safety review action) ▾
<p>Currently, background checks go above the industry standard, and include:</p> <ul style="list-style-type: none"> • SSN trace; sex offender registry; motor vehicle records; local, county & national criminal records; federal courthouse criminal, and Global Watchlist. We also screen monthly against The Office of Inspector General's List of Excluded Individuals/Entities. • Manual background check review, which includes a specialist review of the raw data from government databases and courthouses, as a supplement to the current automated review. • Additional offenses that disqualify a Papa Pal from being engaged to provide services. 	'23, prior to safety review ▾
Analytical algorithm to target recruiting and activation efforts toward our best and most impactful Papa Pals.	'23, prior to safety review ▾
More targeted recruiting for Papa Pals with existing caregiving experience.	'23, prior to safety review ▾

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Pillar 5: Build digital tools to improve and simplify how members interact with Papa, which includes providing new channels for them to share visit issues and enabling us to proactively share more visit data	
<p>We are taking a multimodal approach to address this, given the Medicare Advantage population we serve. Tools will include: 1) a Web-based experience, delivered through SMS, to provide more self-serve options, 2) Self-service IVR (which will quickly let members know which Pal is coming to help them without having to speak to an agent) and, 3) Proactive outbound communication through calls and SMS.</p>	<p>'23 into '24 (post-safety review action) ▾</p>
<p>Reinforce the Preferred Papa Pal program with new features that make it easier for Papa Pals to schedule visits and members to request their favorite Pals. These features include enabling Preferred Pals to schedule/reschedule visits in the app on behalf of their members and improving the Preferred Pal request feature for members. When an agent goes to schedule a visit for a member, we will recommend which Pals they have seen that would make good Preferred Pals and suggest that to the member, fostering even more strong connections.</p>	<p>In-progress post-safety review / into Q3 ▾</p>
Pillar 6: Improve Trust and Safety culture	
<p>Introduce trust, safety, and quality into core company metrics, so this work sits at the center of all decisions, including how we think about filling our visits.</p>	<p>In-progress post-safety review / into Q3 ▾</p>
<p>Roll out new requirements for, at minimum, directors and above to shadow Papa's Call Center, take a visit as a Papa Pal, and schedule/conduct a visit as a Papa member at least once annually. (Our "Be a Pal" program encourages Papa employees to take visits as Papa Pals and share their honest feedback so we can continue to improve. Our CEO takes visits with members as a Papa Pal; this initiative extends the work.)</p>	<p>In-progress post-safety review / into Q3 ▾</p>
Pillar 7: Strengthen Papa Pal platform monitoring and disciplinary action	
<p>Improve GPS functionality within the app, which will allow us to better track where Papa Pals are located, improving transparency around visit fulfillment and preventing fraud.</p>	<p>'23 (post-safety review action) ▾</p>

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<p>Enhance platform monitoring and disciplinary policies that encourage and reward top-performing Papa Pals.</p>	<p>'23 (post-safety review action) ▾</p>
<p>Review and audit visits and post-visit feedback for anomalies (e.g., duration, distance) and immediately pause/suspend/ban Papa Pals from the platform if needed (formalized this process in early 2023).</p>	<p>'23, prior to safety review ▾</p>
<p>Monitor progressive disciplinary actions of Papa Pals via Visit Safety & Integrity Program, which includes a point system (implemented in Aug.-Sept. 2022).</p>	<p>Long-standing ▾</p>
<p>Quickly flag and escalate dissatisfaction and safety issues reported by Papa Pals and members. Advanced software automatically scans intake forms for over 300 keywords that could indicate a safety issue so that such complaints are flagged in real-time to our Trust & Safety team, in addition to the manual escalations. On average, we respond within minutes to safety concerns. (we've been flagging and escalating dissatisfaction and safety issues reported by Papa Pals since the beginning; we enhanced this process in Sept. 2022 with the addition of advanced keyword-scanning software.)</p>	<p>Long-standing ▾</p>
<p>Actively monitor visits in real-time by tracking Papa Pal location and intervene as necessary to confirm visits are filled (we have always actively monitored visits using visit status; added tracking via Papa Pal location last year).</p>	<p>Long-standing ▾</p>
<p>Pillar 8: Further optimize internal tooling and foundational tech</p>	
<p>Migrate to new ticketing and omnichannel communication systems to enable better-structured complaint and incident data. These new tools will improve how we intake, research, and escalate complaints to allow for more rapid and thorough investigations.</p>	<p>In-progress post-safety review / into Q3 ▾</p>