

Tab F: Sequence of Steps for Assessing the *BFWHW* Materials

**Bright Futures for Women's Health and Wellness (*BFWHW*)
Intermediate Assessment of the Physical Activity and Healthy Eating
Materials for Young and Adult
Sequence of Steps**

This attachment puts forth the sequence of steps that will be undertaken for initiation and implementation of the *BFWHW* assessment activities. This sequence of steps includes the letters, forms, and scripts that will be necessary to implement each step. The *BFWHW* Guides, tip sheets, and wallet card, as well as the assessment forms and consent/assent forms are included under separate tabs.

The sequence begins after discussions have been conducted between a site, the Department of Health and Human Services, Health Resources and Services Administration (HRSA), Office of Women's Health (OWH) and Health Systems Research Inc., (HSR) the evaluation contractor.

Letter of Commitment

An official of the health care organization or school-based health clinic signs a letter of commitment to Health Systems Research, Inc. (HSR) indicating their willingness to participate in an intermediate assessment of the *BFWHW* Physical Activity and Healthy Eating Guides, tip sheets, and wallet card. The letter can either be the sample included below or can be developed by the organization or clinic. The site administrator identifies the health care providers of various disciplines and support staff who are expected to be involved in the assessment and arranges for the contractor's assessment team to visit the site to introduce the materials and assessment protocol to the staff.

The following is a sample of a letter of commitment:

To Whom It May Concern:

The _____ *Name of Health Care Organization* _____ for which I am the _____ *Position of the Signatory* _____ is willing and committed to participating in the assessment of the Bright Futures for Women's Health and Wellness (*BFWHW*) physical activity and healthy eating materials. We understand that this assessment requires us to be a part of a multi-site assessment that will be conducted over an approximately four-month period; or until assessment forms from approximately 300–400 persons (250 in school based clinics) are collected.

We agree to instruct providers to use the *BFWHW* materials. The clinic will follow the protocol set forth in the Sequence of Steps document that has been provided to us by Health Systems Research, Inc (HSR), a contractor of the U.S. Department of Health and Human Services, Health Resources and Services Administration (HRSA), Office of Women's Health.

We understand that the results of this assessment will be provided by HSR to HRSA in a written report and that they also are to be published in a peer-reviewed journal. However, the identity of this health care organization, its patients, and health care providers will not be publicly disclosed. We will follow this organization's procedures to ensure that participation in this assessment by both our patients and staff is voluntary.

We also acknowledge that we have been told that this organization will receive \$1000 to acknowledge the additional staff time and direct expenses that are required to be part of a national assessment. I or _____ *Name of a Staff Person at the Health care Organization* _____ will be the point of contact for this organization throughout the assessment and can be reached at _() _____ *phone* _____ and _____ *email address* _____ .

Sincerely,

Name of Staff Person at Health Care Organization
Position at Health Care Organization

Distribution of the Bright Futures Materials to the Sites

Upon receipt of the letter of commitment, the contractor provides copies of the following materials to the health care organizations serving adult women:

- Administrator's Handbook
- Counseling Tip Sheet for the Health Care Providers
- My Bright Future: Physical Activity and Healthy Eating Guide for Adult Women with cover letter
- Bright Futures Tip Sheets for Adult Women
- Assessment forms and envelopes
- Script for the receptionist to use when making the appointment
- Script for the receptionist to use in distributing the materials
- Script for the receptionist to use in recruiting women and distributing the assessment form
- Informed consent forms for women and health care providers
- Assessment forms with envelopes for the health care providers
- Log sheets for the receptionist to record the distribution and return of the assessment forms
- Envelopes and FedEx slips (for doing the weekly mailing of assessment forms to the contractor)

Upon receipt of the letter of commitment, the contractor provides copies of the following materials to the school-based health clinics serving young women:

- Administrator's Handbook
- Counseling Tip Sheet for the Health Care Providers
- My Bright Future: Physical Activity and Healthy Eating Guide for Young Women with cover letter
- Bright Future Wallet Card for Young Women
- Consent forms for the parents or guardian of the young women
- Assent forms for the young women
- Assessment forms, cover letters, and envelopes
- Script for the receptionist to use when making the appointment
- Script for the receptionist to use in distributing the materials
- Script for the receptionist to use in distributing the assent form and the assessment form
- Log sheets for the receptionist to record the distribution and return of the assessment forms
- Assessment forms with envelopes for the health care providers
- Envelopes and FedEx slips (for doing the weekly mailing of assessment forms to the contractor)

Interaction between the Health Care Organization and the Contractor's Staff

The contractor's staff introduces the intermediate assessment of the BFWHW materials at a staff meeting to be arranged by the site's point of contact. The materials being assessed are circulated for the health care provider staff to review. The scope of the assessment form is described and the procedure for returning the providers' assessment forms to the contractor is given. Questions are answered by the contractor's staff.

The contractor's staff will meet with the support staff who will be responsible for distributing the BFWHW materials. The purpose of this meeting will be to review the scripts to be followed in scheduling appointments, distributing the materials, and distributing and collecting the assessment forms.

The administrator will set a date for beginning the assessment activities and inform the contractor via email or telephone as to when the assessment will begin.

The contractor's staff will have weekly telephone calls with the health care organization's point of contact to discuss questions that may arise during the implementation of the assessment. Support staff at the health care organization is encouraged to contact the contractor's staff with issues as they arise. The contractor will provide telephone numbers to be used whenever a need arises (nights and weekends included).

Support staff at the health care organization sites or school-based clinics will keep a daily total of assessment forms distributed and returned. On a weekly basis the support staff will send a copy of the daily logs along with the returned assessment forms from the patients to the contractor.

Interaction between the Support Staff and the Women

Based on the date set for the assessment to commence, the support staff will begin scheduling additional time during the wellness appointment to enable the women (*both young and adult*) to stay after the clinical encounter to complete the respective assessment form. The script the support staff will use when scheduling appointments during this period follows:

At your upcoming appointment, we will be giving you some new materials on physical activity and healthy eating. Our clinic has been asked to see how well these materials work and we will be inviting you immediately after your visit to share your impressions. Therefore, please allow some extra time, approximately 25 minutes, after your scheduled visit. We will see you on (day of the week, date, and time).

When women arrive for their scheduled wellness or health maintenance/check-up visit at the health care organization site or school-based clinic, the following interaction will occur:

The support staff will follow the standard operating procedure for the facility in greeting patients, updating records, and confirming the purpose of the visit. The support staff will then introduce the assessment with the following script:

If appointment made in advance:

“As you may recall when we scheduled your appointment, we are introducing some new wellness materials. They are [as the support staff talks she hands the woman the materials] My Bright Future: Physical Activity and Healthy Eating Guide and Bright Futures Tip Sheets (*for adult women*) / wallet card (*for young women*).”

*If appointment was **not** made in advance:*

“We are introducing some new wellness materials. These new materials are designed for you to read in the waiting room. They are [as the support staff talks she hands the woman the materials] My Bright Future: Physical Activity and Healthy Eating Guide and Bright Futures Tip Sheets (*for adult women*) / wallet card (*for young women*).”

For both appointments scheduled in advance or not in advance:

“Here is a pencil/pen [as the support staff talks she hands the woman the pencil/pen] to write in your responses to the questions in the Guide, write any questions you may have about healthy eating and physical activity for your health care provider, begin setting some of your physical activity and healthy eating goals. Your health care provider will be happy to answer your questions and discuss the materials with you during today’s visit.”

While in the waiting room, the young or adult woman will read the introductory letter handed to her with the Guide, look over the Guide and accompanying materials (tip sheets for adult women /wallet card for young women) and write any questions that she has for her health care provider.

The letter, from the administrator of the health care clinic will read as follows:

**Cover letter for the *BFWHW* materials
On Health Care Center Letterhead**

Dear Patient:

The *NAME OF HEALTH CENTER HERE* is introducing materials to help you and your health care provider talk about physical activity and healthy eating. Because your health is important to us, we also agreed to take part in a multi-site research project to see if these materials are helpful to you and your health care provider when talking about these important topics.

While you are waiting to see your health care provider today, please take a few minutes to read the physical activity and healthy eating materials. Then write down questions to ask your health care provider. There is a place in the guide for your questions. During the visit, your provider will talk with you about physical activity and healthy eating and help you set goals.

After the visit, we will ask you to take about 25 minutes to record your comments about the materials. This information will help this clinic and others to decide whether to continue to use these materials.

You may take these materials home. We hope they are useful to you.

SIGNED BY HEALTH CENTER ADMINISTRATOR

The Clinical Encounter

During the clinical encounter, measurements of the woman's (adult and young) height and weight will be taken. The health care provider will then calculate the body mass index for adult women / BMI percentile for young women and begin to have a conversation with the patient about what this number / percentile means; ask what questions the woman wrote down during the review of the Bright Futures materials while in the waiting room; and proceed to counsel the woman about one or two goals that she might be willing to set to modify her physical activity or healthy eating habits. The provider will assist the woman in recording the goals and discuss the steps that she might take to begin to work toward their achievement. [Note that no script is provided to the health care providers. This is done purposefully in order to allow the health care providers maximum discretion for addressing the woman's needs and concerns.]

Following the Clinical Encounter

After the encounter with the health care provider and as the woman is checking out with the support staff of the health care organization (either clinic or school based health clinic) the following script will be used. This will only be used with young adults if a signed consent form is on file from a parent or guardian.

This clinic is participating in a six-site assessment of the Bright Futures materials, the materials you were given and used with your provider today, to give feedback to a Federal government Office of Women's Health. Your feedback on the Bright Futures materials will be helpful to us in deciding whether to continue using them.

We would appreciate it if you would agree to be part of this one-time assessment. It will take you about 25 minutes to fill out an assessment form today. Do not put your name on the form. You will complete the form and return the form to me in a sealed envelope, after placing "X"s across the seal to ensure that your answers will be anonymous. Are you willing to help us with this?"

If the woman **agrees** to do the assessment form, the following script will be used:

Thank you for volunteering to complete the form. [The support staff hands the woman the assessment form, the consent form (assent form if a young woman), an envelope and a pencil or pen] The consent form explains that there is no risk or reward for your participation. It also says that you may choose to skip questions. It additionally includes telephone numbers if you have questions now or later about this assessment.

For both young and adult women:

After you have read this, if you still agree to take part, please sign the form and return it to me. I will put it in an envelope to send to the contractor. It will be separate from your assessment form so that you can not be identified.

Please take a seat [indicating the space set aside for the women to do the assessment.]. Once you have completed the form, place it in the envelope, seal it and mark an X over

where you have sealed it. This will ensure that no one opens your envelope here at this clinic. No one at this clinic will know what you said. In the event that you have any questions for the contractor, a phone number and person's name has been provided for you to contact. Please return the sealed envelope to me before you leave.

As the woman returns the form to the support staff, the following script will be used:

Thank you for taking part in the assessment of the Bright Futures materials today. You are welcome to take the materials home. We hope that you find them useful.

If the woman **refuses** to do the assessment form, the following script will be used:

Thank you for using the Bright Futures materials today. You are welcome to take them home with you. We hope that you find them useful. Thank you again.

With the Health Care Providers

Throughout the assessment period, the health care administrator or the designated point of contact at the site will monitor the implementation of the Bright Futures physical activity and healthy eating materials by the site's health care providers. Prior to the end of the assessment, the health care administrator or designated point of contact will hand out a packet to participating health care providers. The packet will contain two copies of the informed consent form (one for the provider to sign and return, and the other for him/her to keep), the assessment form, and envelopes for each. The following script will be used to obtain informed consent from participating health care providers before they fill out the assessment form:

“As you know, this clinic is participating in a six-site assessment of the Bright Futures materials, which you have been using with your patients during well visits. The assessment will give feedback to a Federal government Office of Women's Health. Your feedback on the Bright Futures materials will be helpful to us in deciding whether to continue using them.

We would appreciate it if you would agree to be part of this one-time assessment. It will take you about 20 minutes to fill out an assessment form. Do not put your name on the form. You will complete the form and return the form to me in a sealed envelope, after placing “X”s across the seal to ensure that your answers will be anonymous.”

Providers will be asked to sign the consent form if they agree to fill out the assessment form, and return it to the clinic staff in a sealed envelope. They will be asked to keep the second copy of the consent form for their records.

The health center administrator or designated point of contact will then use the following script to remind participating health care providers to complete their assessment after

signing the consent form:

“We expect to complete the assessment of the Bright Futures materials on Date . As part of this multi-site assessment, we ask you to take approximately 20 minutes to complete an assessment form that will give you an opportunity to relate your experiences in using the materials with your women patients coming for wellness/health maintenance visits. Participation is voluntary. Your answers will be anonymous. This form and the envelope in which you should place it after completing it were provided to you in the packet containing the informed consent form. Once you have completed the assessment form please place them in the envelope provided, seal the envelope, put a series of Xs across the seal, and return it to Name of Support staff who will send it to the contractor.

At the next staff meeting I would be happy to host a discussion of your experience with the materials. But I ask that everyone who is going to complete the forms do so before this group discussion.

Thank you ahead of time for your willingness to participate in this assessment. I look forward to hearing about your experiences with the Bright Futures materials and your recommendations about whether we should continue to use them.”

Interview with the Health Care Administrator

The staff of HSR, Inc. will conduct a 30-minute phone interview with the health care administrator at each of the six sites participating in the assessment. The interview will cover the following domains:

- Overall impression about the assessment process with probes to differentiate the feedback from the support staff, the health care providers and the women patients.
- Overall impression about the Bright Futures materials with probes to differentiate the feedback from the health care providers and the women patients.
- Feedback to the assessment contractor about what they would have done differently to make the assessment easier
- Feedback to the Federal government about what would make the Bright Futures materials more useful for their female patient population
- The decision was made in this assessment to use the Bright Futures materials only in wellness and health maintenance visits. What do you think would have been the experience if the materials would have been distributed to all women patients, even those who were here for some illness episode?
- Will the site continue to use the Bright Futures materials? If yes, probing about how they will be used.