Attachment E: Screening Questionnaire

[NOTE: This script to be used by Westat when speaking by telephone with individuals who have responded to an announcement to participate in the Customer Satisfaction with HIE Evaluation Toolkit project.]

A. If responding to an incoming call

Thank you for contacting us. My name is [Name] from Westat. In case we're interrupted, let me get your contact information before we go any further.

Collect the following contact information: name, title, company, telephone number, e-mail, and mailing address.

We are leading recruitment and enrollment for this AHRQ-funded project. The purpose of this telephone call is to determine if you have the background and responsibilities related to HIE evaluation that we're seeking for this project which I'll explain further in a few minutes.

We anticipate inviting all individuals who qualify for this project but there is no guarantee that you will actually be selected to participate. If you are selected to participate, you will receive $100 as a token of our appreciation for taking time to participate in this important project.

Any questions before we proceed?

[Skip to C. Gather information on subject's background and role in the HIE.]

B. If responding to an incoming e-mail via phone (if potential participant has provided a telephone number for contact)

Thank you for contacting us. My name is [Name] from Westat. We are leading recruitment and enrollment for this AHRQ-funded project. The purpose of this telephone call is to determine if you have the background and responsibilities related to HIE evaluation that we're seeking for this project, which I'll explain further in a few minutes.

We anticipate inviting all individuals who qualify for this project but there is no guarantee that you will actually be selected to participate. If you are selected to participate, you will receive $100 as a token of our appreciation for taking time to participate in this important project.

Any questions before we proceed?

That's great. Let me make sure I have the right contact information for you before we go any further:

Ensure you have correct and complete contact information including: name, title, company, telephone number, e-mail, and mailing address.

C. Gather information on subject's background and role in the HIE

How did you hear about this project?

Example: A friend, an e-mail distribution list from a specified organization, or, contacted through a particular Federal program such as an AHRQ grant program, or, the Health IT Research Center (HITRC).
Probe for specific information.

Our announcement indicated that we're seeking individuals who will be materially involved in developing HIE evaluation plans in fall 2012. "Materially involved" is defined as participating in design decisions and contributing directly to a significant portion of the evaluation plan. Do you feel this accurately describes you?

If Yes, proceed to clarify the subject's background and role in the HIE.

If No, thank the subject for their time. Tell them their inquiry will be confidential and that the contact information they have provided will not be used for any other purpose:

We apologize for the miscommunication. Unfortunately, we will not be able to include you in our project at this time. Thank you for willingness to participate in our project. We would appreciate your referral to a friend or colleague who is materially involved in creating an HIE evaluation plan.

Great, can you briefly describe your role in developing an HIE evaluation?

*If subject's role IS appropriate, then proceed to describe the project
and process.*

*If subject's role IS NOT appropriate:
Thank the subject for their time. Tell them their inquiry will be
confidential and that the contact information they have provided will
not be used for any other purpose.*

Based on the information you have provided, it seems like you have the type of HIE evaluation development role we're seeking. Let me tell you about the project.

D. Information about the project

The Agency for Healthcare Research and Quality (AHRQ) has contracted with Westat to gather feedback about one of the tools on the National Resource Center for Health IT (NRC) Web site: Health Information Exchange (HIE) Evaluation Toolkit.

As someone who is planning to evaluate HIEs, AHRQ would like to know your thoughts about the kinds of information that are useful to include in a tool designed to help develop an HIE evaluation plan.

Specifically we are looking for individuals who are tasked with developing an HIE evaluation plan, but have not yet developed it. We would like to provide you with a tool to utilize in helping you to develop your plan. Over a 6-month time period we will be checking in with you monthly to assess your progress in the development of the evaluation plan. These check-ins will be conducted by e-mail, with phone as an alternative to e-mail, and only take about 5 minutes of your time.

Once you use the tool and are done developing your evaluation plan, or still in progress at the end of a six-month project period, we will conduct individual telephone interviews to get your feedback on the tool. The interviews should last between 60 and 90 minutes.

We take the privacy of participants in this project seriously. Generally, only summary data will be provided to AHRQ. The names of individual participants will not be provided to AHRQ. Your responses will be kept confidential to the extent permitted by law, including AHRQ's confidentiality statute, 42 USC 299c-3(c). Any verbatim quotes we include in our report to AHRQ will not be attributed to a specific individual.

Now that I have described the reason for the project and how it will be conducted, are you still interested in participating?

If Yes:

Do you agree to make use of the HIE Evaluation Toolkit over the next few months to help you develop your evaluation plan?

Our interview sessions will take place early in 2013, up to April 2013, depending on if and when your evaluation plan is completed. Do you anticipate that you will be available?

If Yes:

Thank you so much for your willingness to help us. At this point, I have a few additional questions to ask you. The purpose of the questions is to provide AHRQ with an understanding of the demographics of the individuals who are participating in the project. Answering these questions will take less than 5 minutes. As with all information provided by participants, it will only be provided to AHRQ in summary form.

Proceed to ask background questions

If No to any of the above: Thank you for taking the time to talk with me today and have a great day.

E. Background Section

Q1.   How many years have you been involved with HIEs or HIE research and/or evaluation?

   0 – 2 years

   Over 2 years but less than 5 years

   Over 5 years but less than 10 years

   Over 10 years

Q2.   Have you ever visited the AHRQ National Resource Center for Health IT (NRC) Web site, AHRQ's health IT Web site?

   Yes

   Have you visited the sections identified on the AHRQ Health IT Web site as "Health IT Tools and Resources" or the "Knowledge Library?"

   No [GO TO CONCLUSION]

   Yes

   When visiting the AHRQ Health IT Web site, have you ever viewed or interacted with The HIE Evaluation Toolkit?

   Yes

   No

   No

   Not Sure

F. CONCLUSION

Thank you for your time today. To help us better understand your role as an HIE evaluator and the HIE you are creating the evaluation plan for, could you send us descriptions of your HIE – including organization structure and technical framework?

We'll be emailing you the AHRQ HIE Evaluation Toolkit with the next few weeks. We will contact you again one month after that e-mail to check in with you on the progress in developing your evaluation plan and using the toolkit. Just to confirm, the e-mail address I have for you is [STATE E-MAIL ADDRESS]. Is that correct?

For future contacts, I see you've given us [STATE TELEPHONE NUMBER] as the best number at which to reach you. Is there also a time of day that is best to contact you?

Can you provide us with the contact information of two other people involved in the HIE you are conducting the evaluation for in case we are unable to reach you?

Collect additional contact information.

Thank you so much for your willingness to provide feedback. We look forward to your participation in this project.

Goodbye.