

## Attachment B: Monthly Check-in Phone Follow-up

[NOTE: This interview is to be conducted by Westat via phone with participants who have previously agreed to provide feedback on the HIE Evaluation Toolkit but did not respond within 3 business days of receiving the monthly check-in sent by e-mail.]

### A. INTRODUCTION

Hello, my name is [INTERVIEWER's NAME], and I work for Westat on the AHRQ Customer Satisfaction with HIE Evaluation Toolkit project. I am calling for a quick monthly check-in. Do you have 5 minutes to talk about the current status of your evaluation plan?

*If Yes: Proceed to Q1.*

*If No: I would be happy to schedule a check-in call for later this week. What day and time would be best for you? [Be sure to note if the time zone differs.]*

### B. STATUS OF EVALUATION PLAN

Q1. Are you still actively involved in developing an HIE evaluation plan? Yes or no?

*If Yes: Proceed to Q2.*

*If No: Proceed to Q4.*

Q2. Are you using the HIE Evaluation Toolkit to aid in the development of your evaluation plan? Yes or no?

*If No: Why Not?*

*Note response; Proceed to Q3.*

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Q3. Have you completed the development of your evaluation plan? Yes or no?

*If Yes: Proceed to "Schedule in-depth interview."*

*If No: Proceed to "First through fourth month wrap up." [If this is the fifth month of the project, then proceed to "Fifth month wrap-up."]*

Q4. Is the HIE you represent(ed) still developing or planning to develop an evaluation plan during the six-month study period? Yes or no?

*If Yes: Proceed to 'Identify new person involved in the development of the HIE evaluation plan'*

*If No: Proceed to 'Stopped Developing Plan'*

### C. IDENTIFY NEW PERSON INVOLVED IN THE DEVELOPMENT OF THE HIE EVALUATION PLAN

For this project it is important that we interview someone materially involved in the development of the HIE evaluation plan. Would it be possible for us to continue to follow the development of the HIE evaluation plan you were involved with by talking with another person? Can you provide us with the contact information for this person so we can reach out to him/her? [If yes, get information.]

[If no.] As discussed earlier, for this project we need to interview individuals developing an HIE evaluation plan who have agreed to use the HIE Evaluation Toolkit. As you are no longer participating in the development of the plan we will no longer follow-up with you on your experience with the tool. Thank you for your interest and participation.

Do you have any questions?

Thank you.

### D. SCHEDULE IN-DEPTH INTERVIEW

Congratulations on completing your plan. We would now like to schedule a time for the in-depth interview about your experience with the tool.

Can you schedule the interview now or should we call back to schedule at a later time.

*If they can schedule the final interview, please schedule. Otherwise, record time to call back and schedule.*

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### E. FIRST TO FOURTH MONTH WRAP UP

Thank you for your time today. Do you have any questions for me?

We will be in touch with you next month. Good bye.

### F. FIFTH MONTH WRAP UP

Thank you for your time today. Do you have any questions for me?

We would now like to schedule a time for the in-depth interview next month about your experience with the tool. We expect the interview to take between 60 to 90 minutes.

Can we schedule the in-depth interview now or should we call back to schedule at a later time.

*If they can schedule the final interview, please schedule. Otherwise, record time to call back and schedule.*

### G. STOPPED DEVELOPING PLAN

Since you have stopped developing an evaluation plan, we will no longer follow-up with you on your experience with the tool. Thank you for your interest and participation.

If the evaluation team has any questions about your experience, could we reach out to you via e-mail for clarification of your comments? Do you have any questions for me?

Thank you and good bye.