

**APPENDIX 1 B**

**DATA COLLECTION INSTRUMENTS AND  
ELECTRONIC CONTACT RECORD FORM (ECRF)**

**EXAMPLE OF LIVEHELP TRANSCRIPT AND  
LIVEHELP QUESTIONS**

**(CUSTOMER SERVICE AND DEMOGRAPHICS QUESTIONS)**

## Public Burden Statement

NCI Inquiry - National Cancer Institute - RightNow CX

Home Insert Field Insert Control Design Rules

Preview Microsoft Sans Ser 12 Table Position Margin Behavior Action 1 Action 2 Action 3 Action 4 Ribbon Rules Audit Log Notes Spell Check Show Outline

Configuration

Configuration

- Staff Management
- Application Appearance
  - Workspaces
  - Client Workflow Images
  - Navigation Sets
  - Customizable Menus
- Site Configuration
- Internationalization
- Service
- Sales
- Database

Customize List...

Recent Items

- Smoking Cessation Call Back
- Demographics by chat
- Demographics by IS
- 120531-000034
- 120413-000474
- 120525-000422
- 120425-000431
- 120422-000011

Home Analytics Configuration Surveys

Live Media Bar

Login Chat Logged Out Request Chat Cancel Request No Chats Connectivity

Workspaces Explorer NCI Inquiry

Reference # [No Value] Status\* [Unassigned] Internal Assigned Date [No Value]

Point of Access [No Value] Service Number [No Value] Internal Due Date [No Value]

Assigned [No Value] Queue [No Value] Disposition [No Value]

Language [No Value]

Details Messages Audit Log Notes

Contact Type [No Value] Collect Demographics [No Value]

Service Smoking Cessation Contact Information Call Backs Demographics **Public Burden Statement**

"Form approved: OMB No. 0925-0208, expires 09/30/2012"

Public reporting burden for this collection of information is estimated to vary from 1 to 7 minutes per response, including the time for reviewing instruction, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: NIH, Project Clearance Branch, 6705 Rockledge Drive, MSC 7974, Bethesda, MD 20892-7974, ATTN: PRA (0925-0208).

Logged in as: Simchah Suveyke 100%

**Inquiry Thread (120426-000351)**

Send On Save Add Search Knowledgebase Standard Text Options

Chat Transcript Chat Joni Knostman, 04/26/2012 12:52 PM

[12:30:50 PM] Please wait. An agent is connecting.  
[12:31:09 PM] NCI Agent: Thank you for contacting the National Cancer Institute (NCI). How can I help you today?  
[12:32:12 PM] End-user: I'm trying to find out about any programs that I can get my dad in. He is 78 and has colon cancer. He had surgery last year now the cancer has returned. It has also spread to his liver and lungs.  
[12:33:47 PM] NCI Agent: I'm sorry to hear about your dad's situation, it sounds like a difficult time for your family.

Can you tell me more about what type of program that you are looking for?  
[12:34:03 PM] End-user: M  
[12:34:40 PM] End-user: Clinical study or a program that uses immunotherapy  
[12:35:54 PM] NCI Agent: Thank you for clarifying that information. I would be happy to look for clinical trials for your father. We can look for recurrent colon cancer (previously treated and returned).

Can you tell me where your father is located?  
[12:36:28 PM] End-user: He is located in Culpeper, VA but I will take him wherever I have to if he can get treatment.  
[12:37:27 PM] End-user: I'm located in Silver Spring, MD but I will move him up here if I have to  
[12:38:35 PM] NCI Agent: Thank you for that information. What is a zip code in VA?  
[12:39:12 PM] End-user: His zip code is 22701  
[12:39:51 PM] NCI Agent: Thank you it will take me a few moments to gather this information, thank you for your patience.  
[12:40:07 PM] End-user: OK thank you for helping me  
[12:45:56 PM] NCI Agent: The link below will take you to a list of clinical trials that were selected from the National Cancer Institute's list of trials based on the information you provided. Please be sure to discuss this information with the doctor. The doctor can determine whether a person meets the eligibility requirements and can help the person decide if taking part in any of these trials is a reasonable option:  
<http://www.cancer.gov/clinicaltrials/search/printresults?cid=197487&protocolsearchid=10361561>

For more information about clinical trials, please click on this link:  
<http://www.cancer.gov/cancertopics/factsheet/Information/clinical-trials>

[12:47:27 PM] End-user: OK thank you so much  
[12:48:19 PM] NCI Agent: You may have noticed that this search was done 100 miles around the zip code you gave me. It was done for recurrent colon cancer and specifically immunotherapy as the type of treatment.

Your father's doctors will be able to go over the eligibility requirements and help to determine which may be most beneficial to your father.

Do you have any questions about the information I have shared?  
[12:48:52 PM] End-user: No and thank you very much for the information  
[12:49:33 PM] NCI Agent: You are welcome, do you have any other questions that I may assist you with today?  
[12:49:51 PM] End-user: No  
[12:50:11 PM] NCI Agent: Before you go, may I ask you a question to help us evaluate our program and see whom we are serving? Your response will be completely confidential.  
[12:50:26 PM] End-user: yes  
[12:50:37 PM] NCI Agent: Have you used our service before?  
[12:50:42 PM] End-user: No  
[12:50:46 PM] NCI Agent: Thank you for using the National Cancer Institute's LiveHelp service. Please contact us again if you need further assistance.  
[12:51:11 PM] End-user: OK I will. Thank you. You have been very kind and helpful.  
[12:51:44 PM] NCI Agent: I'm glad that this has been helpful, please do contact us again with any further questions or concerns.  
[12:51:57 PM] End-user: I will if I need to  
[12:52:04 PM] " disconnected ("Concluded by Agent").

# Customer Service Questions

The screenshot displays the 'NCI Inquiry - National Cancer Institute - RightNow CX' application. The interface includes a top ribbon with 'Object Tools' and 'Rules' tabs, and a 'Workspace Properties' section. The main workspace is divided into a 'Configuration' sidebar on the left and a central 'Live Media Bar' area. The 'Live Media Bar' contains a 'Workspaces Explorer' showing the 'NCI Inquiry' workspace. The main form area contains several fields for data entry, including 'Reference #', 'Status\*' (set to 'Unassigned'), 'Internal Assigned Date', 'Point of Access', 'Service Number', 'Internal Due Date', 'Assigned', 'Queue', and 'Disposition'. Below these fields are tabs for 'Details', 'Messages', 'Audit Log', and 'Notes'. The 'Details' tab is active, showing a 'Contact Type' dropdown and a 'Collect Demographics' dropdown. A sub-section titled 'Demographics' is expanded, showing an 'Exempt' dropdown and a text area with the following text: 'During our conversation, I already asked you some background information about yourself. I'd like to ask you just a few more questions that will help us to understand who we are serving. We appreciate your taking the time to answer these questions. Please know that all of your answers will be kept private to the extent provided by law. Is this OK?'. Below the text area are fields for 'Used Service Before?' (dropdown), 'How did you locate NCI?' (dropdown), and 'Zip Code' (text input with an 'International' button). The bottom status bar shows 'Logged in as: Simchah Suveyke' and a zoom level of '100%'.

## Demographic Questions:

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What is your age?

- Age
- Don't know
- Break off
- Did not complete
- Callers age 96 or older
- Not sampled
- Refusal
- Did not ask

'3',-1,1,2,'q\_3\_16

What is your Sex?

- Male
- Female
- Don't know
- Did Not Complete
- Not sampled
- Refusal
- Did not ask

'4',-1,1,2,'q\_4\_24

Which of These Ethnicities Best Describes You?

- Hispanic or Latino
- Not Hispanic or Latino
- Don't know
- Did not complete
- Not sampled
- Refusal
- Did not ask

'6',-1,1,2,'q\_6\_38

Which of These Races Best Describes You? You can select more than one:

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Don't know
- Did not complete
- Not sampled
- Refusal
- Did not ask

What Is the Highest Level of Education You Have Completed?

- Grade school
- Some high school
- High school graduate
- Some college
- College graduate
- Post-graduate
- Not sampled
- Refusal
- Did not ask
- Don't know
- Did not complete

'8,-1,1,2,'q\_8\_55

Is There a Place You Usually Go to When You are Sick or Need Advice About Your Health?

- Yes
- No
- Don't Know
- Did not complete
- Not sampled

- Refused
- Did not ask

'9',-1,1,2,'q\_9\_66

What Kind of Place Do You Go Most Often?

- A doctor's office
- A clinic, health center, or hospital clinic
- The emergency room, or
- Some other place
- No one place
- Valid skip
- Don't know
- Did not complete
- Not sampled
- Refused
- Did not ask

'10',-1,1,2,'q\_10\_

In the Last 12 Months, Did You Have Any Kind of Healthcare Coverage, Including Health Insurance, Prepaid Plans Such As HMOs or Government Plans Such as Medicare?

- Yes
- No
- Don't know
- Did not complete
- Not sampled
- Refused
- Did not ask

'11',-1,1,2,'q\_11\_

Would You Say You Had This Coverage During All 12 Months or Less Than 12 Months?

- All 12 months
- Less than 12 months
- Valid skip
- Don't know



- Did not complete
- Not sampled
- Refused
- Did not ask

'12',-1,1,2,'q\_12'

Which Type of Coverage Did You Have?

- Was it public, such as Medicare, Medicaid, or other government plans?
- Was it private, such as an HMO, Blue Cross, Kaiser, Aetna?
- Or, was it both public and private?
- Valid skip
- Don't know
- Did not complete
- Not sampled
- Refused
- Did not ask

'13',-1,1,2,'q\_13'

The final questions are about your family income. I understand that this is sensitive information and I would like to stress again that all of the information you provide is confidential. What Was Your Total Household Income from All Sources Before Taxes Last Year? Just Stop Me When I Get to the Right Category

- Less than \$10,000
- \$10,000 to \$19,000
- \$20,000 to \$29,000
- \$30,000 to \$39,000
- \$40,000 to \$59,000
- \$60,000 to \$79,000
- \$80,000 or more
- Don't know
- Did not complete
- Not sampled
- Refused

'14',-1,1,2,'q\_14\_

Including Yourself, How Many People Living in Your Household are Supported by This Total Household Income?

- Total People
- Valid skip
- Don't know
- Did not complete
- Not sampled
- Refused
- Did not ask

'15',-1,1,2,'q\_15\_