

# MCI #1 TESTING PROTOCOL

Date: Time\_\_ ID #:\_\_ Interviewer Initials:

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| Form Approved<br>OMB No. 0935.0124<br>Exp. Date 1/31/2024 |
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## 1. Introduction

Thank you for taking the time to participate in this special study. Our session today will take approximately a half hour. I'll start by giving you a little background about what we'll be doing today.

Westat is working on this project for the Agency for Healthcare Quality and Research, AHRQ, which is part of the U.S. Department of Health and Human Services. We are testing ways to improve data quality for the Medical Expenditure Panel Survey, or MEPS.

In this study, we will be asking you to participate in three interviews, roughly every three weeks, to provide information about your household's health care events and to give us some feedback.

In a moment, I am going to ask you to share your screen and go to a website to fill out this survey. I am going to observe you as you do this and will take notes as you go through it. I'm interested in all of your feedback, so if anything is confusing, or if you are not sure how to answer a question or are unsure what to do next, just tell me. We are not interested in the specific answers you give but are more interested in how you navigate through the survey. You'll notice that we've incorporated the health care visits you already told us about when you signed up for this study.

We enclosed a consent form in our email exchanges with you– did you receive it? [\[IF NOT ASK IF CAN RE-SEND TO THE EMAIL/CONFIRM EMAIL\]](#) Let me just review what's on the form (please take a look at the form while I review). This is a research project and your participation is voluntary. You can skip any question and you can stop at any point. Everything that you say will be confidential – that is, no one outside the research team will know what you told us. We would very much appreciate your permission to audio and video record this conversation. The recording will be used for note-taking purposes only and may be listened to by the project or AHRQ staff. It will be destroyed when the project is over. Your name will not be linked to any of your responses, though we may include quotes that you provide in our reports. The recordings and our notes will be destroyed after we finish the project.

When we are finished with today's interview, we will email you a 25 dollar Amazon electronic gift card as a token of appreciation for your time, and then will set up our next appointment for about 3 weeks from now. Again, we are asking you to participate in three interviews total. The first two will be 30 minutes long with a \$25 token of appreciation for your time for each interview, and then the last interview will be 90 minutes long with a \$75 token of appreciation for your time.

**IF PARTICIPANT JOINS BY AUDIO ONLY, ASK THEM TO TURN ON THE CAMERA ON THEIR DEVICE:** I would like to be able to see you during the interview to help facilitate the interview today. Would you be willing to turn on your camera?

{**IF OBSERVERS:** We do have observers today from Westat who are taking notes and may jump in at the end to ask questions about your experience. For now, they are on mute and their cameras are off. Is that OK with you? **[IF THE RESPONDENT SAYS NO, DISMISS THE OBSERVERS]}**}

This survey is authorized under 42 U.S.C. 299a. The confidentiality of your responses to this survey is protected by Sections 944(c) and 308(d) of the Public Health Service Act [42 U.S.C. 299c-3(c) and 42 U.S.C. 242m(d)]. Information that could identify you will not be disclosed unless you have consented to that disclosure. Your participation is voluntary and all of your answers will be kept confidential to the extent permitted by law. Public reporting burden for this collection of information is estimated to average 30 minutes per response, the estimated time required to complete the survey. 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: AHRQ Reports Clearance Officer Attention: PRA, Paperwork Reduction Project (0935-0124) AHRQ, 540 Gaither Road, Room # 5036, Rockville, MD 20850.

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Do you have any questions about anything I've said so far? **(ADDRESS QUESTIONS)**

Are you willing to take part in this study? Are you willing to have the session recorded?

**[ASK HOST TO START RECORDER AND GET ORAL PERMISSION TO RECORD.]** It is [DATE AND TIME], do I have your permission to record this conversation? ~~~~  
Thank you.

Do you have any questions before we get started?

## FOR PC/BROWSER

Now I'm going to have you start the web survey on your screen and then have you share your screen with me.

1. First please click on the chat button at the bottom of your zoom screen. I will paste the link to the survey there for you. You can click on it, or copy and paste it into your web browser and enter the username and password. [\[PASTE LINK, USERNAME, AND PASSWORD INTO CHAT AREA\]](#).
2. Please go back to the Zoom screen, and click on the "Share screen" button at the bottom of your zoom screen, and in upper right corner, click "Screen". Then click button in lower right corner that says "share". [CONFIRM CAN SEE PARTICIPANT'S SCREEN AND CAMERA VIEW](#)

## FOR PHONE

Now I'm going to have you start the web survey on your phone and then have you share your screen with me.

1. First I will paste the link to the survey in the chat area of Zoom. You can click on the link, and copy the username and password to the link to start the survey. [\[PASTE LINK, USERNAME, AND PASSWORD INTO CHAT AREA ONE LINE AT A TIME\]](#).
  - a. [\[FOR APPLE DEVICE:\]](#) Please go back to the Zoom app, and click on the "Share content" button at the bottom of your zoom screen, and choose "screen" at the very top. It will ask you to start screen broadcast and have the zoom logo checked there, please click "start broadcast" in the middle of your screen. It will count down and then start broadcasting your screen, please click anywhere other than the window to go back to the Zoom app. [CONFIRM CAN SEE PARTICIPANT SCREEN](#) Now can you please go to the browser where you have the survey link open?
  - b. [\[FOR ANDROID DEVICE:\]](#) Please go back to the Zoom app, and click on the "Share content" button at the bottom of your zoom screen, and choose "screen". It will ask you to allow permission for Zoom to stay on top of app. Go ahead and toggle the button to give permission. Then tap the back button to go back to the Zoom app. [CONFIRM CAN SEE PARTICIPANT SCREEN](#) Now can you please go to the browser where you have the survey link open?

[IF R NOT WILLING TO SHARE SCREEN](#) I am sorry, but we have to be able to see your screen and observe you while you are filling out the survey today. The screen sharing is temporary, only for the purposes of this interview, and as soon as you are finished with the task, I will have you stop sharing your screen. Are you willing to share your screen, or you would like to stop this interview?

Again, I will be quietly observing as you answer the questions. If you're having any difficulties or are unsure about anything, we can discuss that once you're finished.

Do you have any other questions before you start?

[OBSERVE AND TAKE NOTES ON ANY RESPONDENT DIFFICULTIES OR FEEDBACK. IF RESPONDENT ASKS FOR HELP, SAY “Please do whatever you’d do if I were not here observing you.” MAKE A NOTE AND ASK ABOUT IT IN DEBRIEFING.]

[PLEASE STOP THE RESPONDENT BEFORE THEY HIT “SUBMIT” SO YOU CAN GO BACK THRU THE SCREENS AND PROBE]

## Debriefing questions

Now that you’ve worked through the questionnaire, please tell me your overall thoughts about your experience taking this survey.

- Were there any features or things about the web survey design that you particularly liked?
- Were there any features or things about the web survey design that you didn’t like?

Think about your overall experience with the survey, how easy or difficult was it for you to navigate through the web survey?

- **IF DIFFICULT:** What was difficult for you? **IF NEEDED,** Were there any instructions you didn’t understand, any functions or features you didn’t know how to use?
  - o Do you have any suggestions on how to make it less difficult?

What did you think about the way the questions looked on the screens, in terms of the font, the font size, and knowing how to enter your answers?

- How about the background color?
- **IF R ON MOBILE PHONE:** What did you think about the size of the navigation buttons? Were they large enough?

## IF RESPONDENT DID NOT ENTER ANY EVENTS:

- To help us get some additional feedback on the survey, I'd like to ask you to enter some fictional healthcare events and then to tell me what you thought of the experience.
- Please navigate back to question 1.
- Now I'd like you to pretend that you went to your primary care doctor on December 1, 2021, and to your dentist on December 15, 2021. Please go ahead and fill this out as if you had those two events to report, and once you've entered them, please review the entries to make sure everything is accurate.
- **AFTER RESPONDENT IS FINISHED, PROCEED WITH THE PROBES BELOW.**

Now I want to have you go back to a few of the screens so I can get your thoughts on some specifics.

- **HELP RESPONDENT NAVIGATE BACK TO THE "ADD ENTRY" SCREEN:**

What were your thoughts about the way the "Add Entries" screen looked?

- o How easy or hard was it to know what to do on this page?
  - o What did you think about the drop down list of providers that showed up when you started typing?
  - o What do you think about each of the navigation buttons at the bottom of the screen? Did you understand what each button did before trying it?
  - o Do you have any other feedback about the way this screen was organized?
- **HELP RESPONDENT NAVIGATE TO THE "REVIEW ENTRIES" SCREEN:** What were your thoughts about the way the "Review Entries" screen looked?
    - o **ASK IF NECESSARY:** Were you able to find the screen yourself?
    - o How did you use this information?
    - o How helpful was it to see this information?
    - o What did you think about the way it was organized?

**REVIEW ANY OTHER NOTES YOU TOOK DURING THE OBSERVATION. SAMPLE PROBES:**

- “I noticed that xxx happened while you were filling it out. Can you tell me more about that and how you decided what to do?”]
- “It seemed like you were unsure about xxx. Can you say more about that?”

Besides what is discussed, do you have any other suggestions for improving the usability of this survey?

- Are there any other features that could be added to help you fill this out?

Finally, I'd like to ask you about your [household's] health records.

- Did you use any health records to help you fill out this survey today?
- IF YES, What kinds of health records did you use?
- Regardless of what you might have used in today's interview, what kinds of health records do you keep track of for [yourself/other household members]? (IF NEEDED, PROBE: What about calendars? Patient portals? Health insurance statements? Medical bills? Anything else?)
- (IF ANY RECORDS ARE MENTIONED) How do you keep your health records organized? For example, do you keep them all in one folder or cabinet? Are they kept in various places?
  - o How easy or hard is it for you to collect details about all of the recent health care events that [you/your household members] have had?

Those are all the questions I have for you. **IF OBSERVERS PRESENT:** We have observers in the session today. I'd like to invite them to send me a chat in Zoom if they have any follow-up questions they'd like me to ask.

Is there anything we have not talked about that you would like to tell me? **DISCUSS ANY PARTICIPANT COMMENTS**

That concludes our interview. I'm going to stop the recorder now, and then will confirm your email address so that we can send you the incentive and set up your next

interview.

STOP RECORDING AND END THE INTERVIEW

CONFIRM INCENTIVE EMAIL ADDRESS

SCHEDULE NEXT INTERVIEW FOR ROUGHLY 3 WEEKS FROM NOW.