

MCI #1 TESTING PROTOCOL

Date: Time__ ID #:__ Interviewer Initials:

Form Approved OMB No. 0935.0124 Exp. Date 1/31/2024

1. Introduction

Thank you for your participation in MEPS and 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.

We are testing ways to improve data quality for MEPS. One idea is to ask MEPS panelists to log onto a monthly check-in web survey to keep track of health care events, so that by the time the next cycle's interview is conducted, there is already a list of events for that household. Today I'd like you to try filling out that monthly check-in, and then we'll talk about what you thought.

So 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.

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 electronic gift card as a 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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Consent Process

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.

- We are considering asking MEPS respondents to log on each month in between the regular 6-month interviews to fill this out, providing a \$10 incentive for each month that it is completed. What do you think about that idea?
- How likely would you have been to do this? What makes you say that?
- Do you think you would have filled it out every month in between cycles? What makes you say that?
- How likely would you have been to fill it out in months when you had no events to report? What makes you say that?
- In what ways could collecting this information every month be helpful for your regular MEPS interview?

How easy or difficult was it for you to navigate through this 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?

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 January 15, 2022, and to your dentist on February 1, 2022. 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 were your reactions to seeing the names of your household members already loaded into the survey?
 - o Did you see a list of providers show up when you started typing in the name of the provider?
 - Where do you think this list came from?
 - How helpful is it for this information to already be loaded into the survey for you?
 - o What do you think about each of the navigation buttons at the bottom of the screen? Were any confusing?
 - **IF MOBILE DEVICE:** Were the navigation buttons large enough?
 - o Do you have any other feedback about the way this screen was organized?
- **HELP RESPONDENT NAVIGATE TO THE “REVIEW ENTRIES” SCREEN:** This screen shows all of the events you reported in your last MEPS interview.
 - o What are your thoughts about the way the “Review Entries” screen looks?
 - o What did you/would you use this information for?
 - o How helpful is it to see this information?
 - o What did you think about the way it is organized?
 - o Why do you think we are displaying this information for you?

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 we have already 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?
- Do you have any ideas for how the MEPS study could have helped respondents to keep their health records more organized and accessible?

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.

STOP RECORDING AND END THE INTERVIEW

CONFIRM INCENTIVE EMAIL ADDRESS

We are also planning a focus group with exiting MEPS respondents to talk about other ideas for how we might improve the MEPS experience for respondents. The discussion will be held on Zoom on [DATE] at [TIME] and participants will be provided with \$75 for participation in a 90 minute group discussion. Would you be willing to participate in this last activity? [IF YES: Thank you, we will email you with the information about the focus group in the next few days.]