

MCBS Beneficiary Supplement Contacting Guide

Hello, may I please speak to [RESPONDENT/DESIGNATED PROXY]?

[IF TALKING TO RESPONDENT] My name is [NAME]; I'm from NORC [at the University of Chicago] calling on behalf of the Medicare Current Beneficiary Survey. How are you today?

I am calling because you are a [recent/current] participant in the Medicare Current Beneficiary Survey.

We are contacting MCBS respondents to participate in a new short telephone survey called MCBS Pulse. This special opinion survey about your experiences with Medicare and the health care system. We sent you a letter in the mail about this survey. Do you recall receiving the letter?

[IF YES, RECEIVED THE LETTER:] Great! As the letter mentioned, the survey will take about 20 minutes of your time and will be completed over the phone. Would you be available to do the interview now or can we schedule a time for me to call back and do it at your convenience?

[IF NO, DID NOT RECEIVE THE LETTER:] The letter explained the importance of this survey to help Medicare understand how it can improve healthcare experiences for Medicare enrollees like you. The survey will take about 20 minutes of your time and will be completed over the phone. Would you be available to do the interview now or can we schedule a time for me to call back and do it at your convenience?

[IF YES, WANTS TO DO THE INTERVIEW NOW:] PROCEED WITH THE INTERVIEW

[IF NO, WANTS TO SCHEDULE AN APPOINTMENT:] SCHEDULE AN APPOINTMENT USING CASE MANAGEMENT SYSTEM

[IF R INDICATES THEY WANT SOMEONE PRESENT OR NEED HELP ANSWERING QUESTIONS:] If you'd like, you can have a friend or family member present on the call during the interview to help you answer some questions. Or you can select someone to provide us with your information on your behalf if you don't think you will be able to complete the interview. [COLLECT NAME/CONTACT INFORMATION FOR ASSISTANT/PROXY.]

[IF TALKING TO PROXY:] Hello, my name is [YOUR NAME] from NORC [at the University of Chicago] and I am calling on behalf of the Medicare Current Beneficiary Survey regarding a study about ways Medicare can improve the services it provides to Medicare enrollees. I'd like to speak with [PROXY NAME]. Are they available?

[IF AVAILABLE:] Recently, [RESPONDENT NAME] was sent a letter explaining that someone would contact them for an interview.

[RESPONDENT NAME] indicated that they would not be able to participate but gave me your name as the person most knowledgeable about their healthcare. Because [RESPONDENT NAME] is irreplaceable in this study, if they are unable to complete the interview, we still want to allow them to have a role in improving Medicare. You can participate on behalf of [RESPONDENT NAME] and allow for [RESPONDENT NAME]'s health care experiences to help guide Medicare policies now and in the future.