

Medicare Research Discussion Guide Group Round Table / Beneficiaries

OMB Control Number: 0938-1382

GenIC #13 - TRIPTK

Overview (for Internal Teams only)

This session explores how Beneficiaries experience their health, coverage, and Medicare journey in a group setting, surfacing the shared routines, needs, and decision moments that shape how they manage care. By listening to how they describe their experiences, compare approaches, and react to one another's stories, we identify collective pain points and opportunities to improve the clarity, usability, and accessibility of Medicare.gov.

The estimated participation burden for this interview is 90 minutes, which includes all discussion and optional tasks. The structure and activities in this guide follow PRA-aligned principles, emphasizing low burden, voluntary participation, and plain-language clarity for all respondents. *Note that Moderator notes & review guidance is in blue for clear instructions.*

Methodology	Round Table (Beneficiaries) - Group Discussion. Note that tasks are optional & can default to verbal discussion as needed.
Moderator(s)	TRIPK (Anjeli, Candice)
Total across 3 markets	n6 (1 per market), beneficiaries
Format	90 min guided group session at each research facility

The conversation will flow as follows:

Opening Remarks	(5 min / 0:00 - 0:05)	Set expectations, introduce the session, and establish a comfortable, open group environment.
Introductions + "Genre" Exercise	(15 min / 0:05 - 0:20)	Build rapport and surface how participants emotionally frame their health-management experience.
Managing Health: Current + Ideal State	(30 min / 0:20 - 0:50)	Use imagery to explore how participants describe their present experience and what they wish it could be.
Medicare Journey Chapter	(35 min / 0:50 - 1:25)	Examine memorable Medicare moments to understand trust, decision-making, information use, + the role of Medicare.gov.
Wrap-Up + Close	(5 min / 1:25 - 1:30)	Gather final reflections and close the session on a clear and appreciative note.

Opening Remarks

(5 min / 0:00 - 0:05)

Welcome participants, go over guidelines/loose agenda for the discussion, and share privacy statement.

- Hello! Thank you for being here today! My name is <MODERATOR>. My colleague <MODERATER> and I talk to people about their experiences with health and healthcare. Today we'll focus on your approach to managing your health. We'll touch on what that's like for you, your experience with insurance broadly, and Medicare more specifically.
- Today we're keeping it lively! We'll be doing some activities, sharing thoughts and wishes, and thinking about how to create better experiences together.
- We want to remind you this is an open discussion. We're looking to learn from you, not test you. There are no "wrong" or "right" answers. So please, be open and direct – don't worry about hurting our feelings or offending us. We work for an independent market research firm, we've been hired to do this research on behalf of Medicare. Your participation and answers will have no impact on anyone's Medicare account or experience. We're here for one purpose: to understand your unique points of view. You're our experts today. And if you want to stop or take a break at any time, please tell me.
- Participation is completely voluntary. You may skip any question or choose to participate verbally. Please do not share any personal identifiers such as full names, Social Security Numbers, Medicare Numbers, addresses, or medical record numbers.
- Before we dive deeper, I'd like to read this disclosure statement: According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0938-1382 GenIC #12. This information collection is being conducted to help improve informational notices for people with Medicare and the results will be used to ensure that people with Medicare understand important information about their plans. The time required to complete this information collection is estimated to average less than 90 minutes in total, including the time to hear instructions, ask and answer questions and complete any written or verbal tasks. This information collection is voluntary, and CMS will keep the information private to the extent provided by law. If you have comments concerning the accuracy of the time estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security Boulevard, Attn: PRA Reports Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.
- This discussion is to be used for research purposes only and is being recorded to aid in analysis and reporting across many such discussions. The information you provide will not be associated with you individually and will be aggregated with other participants.

This will be asked before the session by facility hosts to each individual privately: Do we have your permission to record our conversation and to use the information you provide in this discussion for research purposes? [Get verbal yes from all participants]

- Are there any questions before we get started?
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Introductions + “Genre” Exercise

(15 min / 0:05 - 0:20)

Meet and build rapport with the participants, and begin to surface what matters to them and how they feel about health care

- OK, let's dive in by going around and introducing ourselves. Please say your name and answer this one question: If the story of managing your health was a movie, what genre would it be - and why?

Have the intro prompts written on the whiteboard for easy recall.

Managing Health: Current + Ideal State

(30 min / 0:20 – 0:50)

Gain an understanding of the needs that can be better supported by Medicare, through exploring what participants experience now and what their optimal experience would be.

This activity will use imagery to get at needs and emotions that may be harder to verbalize.

Step 1: Managing health: current state

An assortment of images (from more realistic to abstract and textural) pulled from magazines will be on the table. Moderators will guide the participants to sift through and choose one image with this prompt:

- Find an image that symbolizes or describes **what it feels like to manage your health** and everything that's involved: finances, medicines, doctor's visits, medical bills, claims etc...
- This image does not have to be literal - it could represent what you do, how you feel, a challenge or a need related to looking after your health.
- This activity is voluntary and may be completed verbally if preferred.

Step 2: Managing health: ideal state

Once all Participants have their image chosen, moderators will prompt them to:

- Find an image that symbolizes or describes **what you wish it was like to manage your health**, and everything that's involved.
- This image might represent what a “perfect world” future would look and feel like, from your personal perspective.
- This activity is voluntary and may be completed verbally if preferred.

Step 3: Cross Share and Curated Conversation

Once everyone has chosen their two images, ask each participant to share in this format, and elaborate briefly:

- Today the experience of caring for the health of my friend/family member feels like _____ (first image) but I wish it was more like: _____. (second image.)

Moderators will facilitate a share and discussion about the images and the needs, drivers, and overall experiences they represent.

Medicare Journey Chapters

(35 min / 0:50 – 1:25)

Explore trust dynamics, decision-making, future wishes, and the experience of using [Medicare.gov](https://www.medicare.gov) through the lens of memorable moments in the medicare journey

Step 1 — Story Sheet (15 min)

Moderators hand out a “Story Sheet” to participants, explain the purpose and structure of the sheet, and will assist participants in using it throughout the activity.

To kick off this activity, think of an experience with Medicare that really stands out to you. This could be a “chapter” from your Journey homework assignment.

Please choose a chapter that fits with one of the themes listed on the Story Sheet.

The Story Sheet lists eight common Medicare themes for participants to choose from: Learning About Medicare, Signing Up or Enrolling, Finding Doctors or Clinics, Figuring Out Costs, Making Changes, Managing Medication, Dealing with Bills, and Filing a Claim.

Now let's dive in:

- Circle the theme and pick a picture that represents it. Please note, picking a picture is voluntary and may be completed verbally if preferred.
- Name the moment you're thinking of: if this experience was a chapter title, what would it be?

- What people, places, things did you reference or use to help you in this moment? How did they help?
- What websites/apps did you use, if any? If you used [Medicare.gov](https://www.medicare.gov), please describe the experience. How did it play into the experience, how did it help or hinder?
- When did you feel most confident? When did you feel most uncertain, anxious, or frustrated?
- Magic Wand: If the experience was not what you hoped it would be, what do you wish it had been like? Anything you'd change?

Step 2 – Cross Share (15 min)

Moderators hang all the worksheets up, quickly note patterns, and curate conversation to get the group sharing thoughts and ideas with each other.

Prompts for discussion:

- When was decision making easy? Difficult?
- Who/what did you trust to guide you?
- Who/what *didn't* you trust?
- Where did the website help, or not?
- What other tools were involved?
- What needs and wishes for an ideal future experience are emerging?

Wrap-Up & Close

(5 min / 1:25 – 1:30)

Conclude the interview.

- We are ready now to wrap up. Do you have any final thoughts for us?
 - We really enjoyed our time with you and greatly appreciate all of your insight. Thank you very much!
 - I'll let our recruiting partner know we had a great session, and they'll take care of your gratuity.
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