

Medicare Research JourneyAI Questionnaire Medical Professionals

OMB Control Number: 0938-1382

GenIC #15 - TRIPTK

Audience Programming Notes

This survey was scoped to take 20 minutes for each respondent to complete, and based on the number of potential open (7-10) and closed ended questions (6) for each respondent it should fall within that range.

The main audiences for this study are:

- Independent Medicare broker/agent
 - Captive or plan-affiliated Medicare agent (*represent one plan/network only*)
 - Sales representative for a Medicare plan/insurer (*internal plan rep*)
 - SHIP counselor or nonprofit Medicare advisor
 - Healthcare front desk / billing / service staff who regularly assist Medicare patients
 - Plan call center or insurer customer service representative supporting Medicare members
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Survey

INTRO

Thank you for taking the time to take this survey.

Your participation is voluntary. There are no right or wrong answers and your answers are optional.

Some questions ask for a brief written response. Please share your thoughts in your own words. Your answers will be combined with others and not linked to you individually.

This survey should take about 20 minutes to complete.

We truly appreciate your participation.

[INTERNAL NOTE: The objective of this questions is to understand how respondents typically interact with the clients they serve and how they see their work]

Q1. You mentioned that part of your job is interacting with Medicare beneficiaries. Please briefly describe what those interactions are typically like, the emotions you see from people and how you assist them. *Narrative [min 75 characters]*

[INTERNAL NOTE: The objective of these questions is to gauge the level of understanding respondent's clients have of Medicare and what their gaps are]

Q2. How easy or difficult do you think it is for the clients you work with to understand Medicare?

- a. Very easy
- b. Somewhat easy
- c. Neither easy nor difficult
- d. Somewhat difficult
- e. Very difficult

Q3. When clients start working with you, how prepared and well-versed are they in understanding Medicare and how it relates to their needs?

- a. Very prepared
- b. Somewhat prepared
- c. Neither prepared nor unprepared
- d. Somewhat unprepared
- e. Very unprepared

Q4. In your own words, what are the biggest challenges or sources of confusion that your clients face when they're trying to understand Medicare, coverage options and how to make it work for them? *Narrative [min 75 characters]*

Q5. Select the top 3 areas where people most often need help with Medicare?

Rank top 3

[RANDOMIZE]

- a. Understanding what Medicare covers
- b. Understanding what their plan covers
- c. Comparing plans
- d. Estimating costs
- e. Handling paperwork or forms
- f. Using Medicare.gov or plan websites
- g. Understanding bills, claims, or EOBs
- h. Finding doctors or providers
- i. Understanding prescription drug coverage
- j. Other *(please specify)* **[ANCHOR]**

Q6. **[IF screener indicates Spanish/bilingual OR Mostly Spanish-speaking client]** Please briefly describe any challenges your bilingual or non-English speaking clients face when trying to understand Medicare and making sure it fits their needs? *Narrative [min 75 characters]*

[INTERNAL NOTE: The objective of this question is to understand how respondents perceive the needs and wants of clients when it comes to Medicare]

Q7. How important are each of the following factors when your clients are figuring out how to make Medicare meet their needs?

[RANDOMIZE]

[Likert Scale Grid: Not important at all / Slightly important / Moderately important / Very important / Extremely important]

- a. Keeping costs low
- b. Getting the best coverage
- c. Keeping their doctors
- d. Extra benefits (dental/vision/OTC)
- e. Recommendations from family/friends
- f. Help from professionals such as yourself
- g. Other (please specify) **[ANCHOR]**

[INTERNAL NOTE: The objective of these questions is to understand the types of advice respondents are giving]

Q8. How confident are you in your ability to help your clients make decisions regarding Medicare?

- a. Not at all confident
- b. A little confident
- c. Neither confident nor not confident
- d. Somewhat confident
- e. Very confident

Q9. Please briefly describe any guidance or key messages you most often share with clients?

Narrative **[min 75 characters]**

Q10. Please list out the main information sources or tools you direct your clients to when they have questions about Medicare.

Enter up to five

[SHOW 5 OPEN TEXT FIELDS]

[INTERNAL NOTE: The objective of these questions is to understand how respondents find information about Medicare]

Q11. Which sources of information do you personally use to understand Medicare and stay updated?

Select all that apply

[RANDOMIZE]

- a. Official government websites or tools
- b. Formal training or certification materials
- c. Medicare plan provided resources
- d. Nonprofit or community-based training resources
- e. Healthcare provider offices or medical staff
- f. Professional education (webinars, CE, compliance updates)
- g. Industry associations or professional organizations
- h. General online research
- i. AI tools (for example, online chat assistants)
- j. Video-based learning resources

- k. Online peer communities or discussion groups
- l. Colleagues or other professionals in your field
- m. Printed reference materials
- n. Phone-based support hotlines
- o. Employer/internal guidance or resources
- p. Other (Please specify) **[ANCHOR]**

Q12. **[IF screener indicates Uses Medicare.gov/plan sites weekly+ OR Uses websites occasionally]** You mentioned that you visit Medicare.gov or plan comparison websites for your work. Please briefly describe which tasks it is most valuable for? Narrative **[min 75 characters]**

Q13. **[IF screener indicates Uses Medicare.gov/plan sites weekly+ OR Uses websites occasionally]** Please share your thoughts on what you would change or add to Medicare.gov and/or plan comparison websites and how that would help you better serve your clients? Narrative **[min 75 characters]**

[INTERNAL NOTE: The objective of these questions is to understand the role respondents play during major life changes experienced by their clients]

Q14. When clients experience significant health or life changes, please briefly describe what support they typically need from you specific to Medicare? Narrative **[min 75 characters]**

[INTERNAL NOTE: The objective of this question is to give respondents a chance to provide feedback at the end of the survey in case anything came up in their mind when taking it]

Q15. Please share your thoughts on the one thing you wish someone had told you that you would tell someone who is just starting to learn about Medicare? Narrative **[min 75 characters]**

Q16. If you could improve one Medicare-related resource to better support you and your clients, please briefly describe what it would be and why? Narrative **[min 75 characters]**

PRA 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 (Expires 12/31/2026). This is a voluntary information collection. Although CMS is not invoking statutory support for confidentiality, the quality of this type of information requires respondent candor and anonymity. Therefore, CMS pledges to keep the information collected private unless otherwise required by law. Respondents will be notified on the data collection form that their information will only be reported in aggregated form and no personally identifiable responses will be publicly released. The time required to complete this information collection is estimated to average 15-20 minutes per respondent, including the time to review instructions. 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.