

Attachment A: Recruitment Screeners for Consumer and Issuer Focus Groups

Consumers

Consumer recruitment guidelines

- Recruit to have 36 individuals for 30 participants to show up and participate in focus group (estimating up to 6 “no shows”)
- Each focus group will last 1 hour (60 minutes)
- Participants will receive up to \$75 for their time
- General screening criteria for all participants:
 1. Enrolled in a health insurance plan through a state-based or federally-facilitated Marketplace
 2. 21 to 64 years of age (Mix of ages)
 3. Mix of genders
 4. Mix of education levels
 - a. 25% of participants should have no more than a high school degree or the equivalent
 5. Mix of races/ethnicities
 6. Do not work in the health, health research, or the pharmaceutical industries;
 7. Have not participated in interviews or focus groups in the last 3 months
 8. Can read English, Spanish, or Chinese

Consumer screener

INTRO WHEN PERSON ANSWERS THE PHONE:

Hello, may I please speak with *[FIRST AND LAST NAME]*? My name is *[RECRUITER FIRST AND LAST NAME]*, and I'm calling on behalf of the American Institutes for Research (also known as A-I-R), a nonprofit research organization.

IF RESPONDENT NOT AVAILABLE EITHER:

- DETERMINE A GOOD TIME TO CALL BACK OR
- LEAVE MESSAGE ON ANSWERING MACHINE

ANSWERING MACHINE SCRIPT:

Hello, my name is *[RECRUITER FIRST AND LAST NAME]*. I'm calling on behalf of the American Institutes for Research, a nonprofit research institute. We would like for you to participate in a focus group about your experiences with selecting, enrolling in, and using a qualified health plan or QHP offered through the Health Insurance Marketplaces. Please call *{INSERT PHONE NUMBER}* at your convenience.

IF RESPONDENT IS AVAILABLE, IDENTIFY REASON FOR CALLING.

I'm calling today about a research project that we are doing about choosing, enrolling in, and using a qualified health plan or QHP offered through the Health Insurance Marketplaces.

If you are interested in helping with this project, and you meet the requirements for participation, we will invite you to participate in an online focus group using Zoom. It would take one and a half hours of your time, and we would give you \$75 to thank you for participating.

May I ask you a few questions to see if you meet our criteria for interview participants?

IF NEEDED, EXPLAIN FURTHER: We need to include people with specific characteristics and experiences so that we end up with a mix of people with different backgrounds. So I have to ask you some questions to see if you fit the profile of participants that AIR is looking for in the interviews.

IF YES, CONTINUE TO QUESTION 1. IF NO, THANK & END (END SCRIPT A).

Before we begin, I'd like to let you know that all information you provide will be held in confidence. Your participation is voluntary, and you may ask me to skip any questions that you do not wish to answer. You can stop at any time. None of the information that you provide to us will be used for any purpose outside of this focus group.

1. Do you currently have health insurance? This includes health insurance from any source such as Medicaid, Medicare, private insurance such as Aetna, Blue Cross Blue Shield, Kaiser, etc., and insurance coverage through your employer or through your spouse.

☐ YES ☐ NO

IF NO, THANK AND END (END SCRIPT B).

2. Did you buy your insurance through the [Healthcare.gov federal marketplace] or [Name of state-based Marketplace in their location]? [You could have enrolled online through the [Healthcare.gov federal marketplace, name of state-based Marketplace], over the phone, or with the help of [an insurance broker/ insurance navigator or assistant]

☐ YES ☐ NO

IF NO, THANK AND END (END SCRIPT B).

3. How many people, including yourself, are covered by your health insurance plan?

People

+ 1 (yourself)

IF 2 OR MORE, who is covered by your health insurance plan?

☐
☐

Individual

☐

Spouse/Partner

Dependents/Children

4. Have you ever worked for any of the following:

- ☐ A health insurance company, THANK AND END (END SCRIPT B).
- ☐ Doctor's office or clinic, THANK AND END (END SCRIPT B).
- ☐ Hospital, THANK AND END (END SCRIPT B).
- ☐ Centers for Medicare and Medicaid Services or Department of Health & Human Services, THANK AND END (END SCRIPT B).
- ☐ Health research firm or organization, THANK AND END (END SCRIPT B).
- ☐ Pharmaceutical company, THANK AND END (END SCRIPT B).

5. What is your age?

years old

IF YOUNGER THAN 21 OR OLDER THAN 64, END SCRIPT B

6. How many people, including yourself, currently live in your household?

People

+1 (yourself)

7. Have you participated in an interview or focus group in the last 3 months for a research project?

☐ YES ☐ NO

IF NO, THANK AND END (END SCRIPT B).

9. Which of the following categories best describes the total income of your household in 2022, before taxes? Please include before-tax income from all sources such as salaries and wages, Social Security, retirement income, investments, and other sources. Would you say...(RECRUIT MIX)

- | | |
|--------------------------|--------------------------------|
| <input type="checkbox"/> | Less than \$20,000 |
| <input type="checkbox"/> | \$20,000 to \$29,999 |
| <input type="checkbox"/> | \$30,000 to \$39,999 |
| <input type="checkbox"/> | \$40,000 to \$49,999 |
| <input type="checkbox"/> | \$50,000 to \$59,999 |
| <input type="checkbox"/> | \$60,000 to \$69,999 |
| <input type="checkbox"/> | \$70,000 to \$79,999 |
| <input type="checkbox"/> | \$80,000 to \$89,999 |
| <input type="checkbox"/> | \$90,000 to \$99,999 |
| <input type="checkbox"/> | More than \$100,000 |
| <input type="checkbox"/> | Refused to answer the question |

10. What is your gender?

<input type="checkbox"/>	Male
<input type="checkbox"/>	Female
<input type="checkbox"/>	Other _____

{Recruit a mix of men and women}

11. What is the highest grade or level of school you have completed?

<input type="checkbox"/>	Less than high school graduate
<input type="checkbox"/>	High school diploma
<input type="checkbox"/>	GED
<input type="checkbox"/>	Technical or vocational school or certificate program
<input type="checkbox"/>	Associate's Degree (2 year college graduate)
<input type="checkbox"/>	Some college (1 – 3 years of college, no degree)
<input type="checkbox"/>	Bachelor's Degree
<input type="checkbox"/>	Graduate degree (Master's or Doctorate)

{Recruit a mix of educational levels, preferably with at least 25% of participants having a GED, High School Diploma, or less than high school graduate}

12. Are you of Hispanic, Latinx/Latino/Latina or Spanish background?

<input type="checkbox"/>	YES	<input type="checkbox"/>	NO
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{Recruit a mix of races/ethnicity using Questions 12 and 13}

13. How would you describe your race? (check all that apply)

<input type="checkbox"/>	White
<input type="checkbox"/>	Black or African American
<input type="checkbox"/>	American Indian or Alaska Native
<input type="checkbox"/>	Asian Indian
<input type="checkbox"/>	Chinese
<input type="checkbox"/>	Filipino
<input type="checkbox"/>	Japanese
<input type="checkbox"/>	Korean
<input type="checkbox"/>	Vietnamese
<input type="checkbox"/>	Other Asian
<input type="checkbox"/>	Native Hawaiian
<input type="checkbox"/>	Guamanian or Chamorro
<input type="checkbox"/>	Samoan
<input type="checkbox"/>	Other Pacific Islander

{Recruit a mix of races/ethnicity using Questions 12 and 13}

INVITATION IF INDIVIDUAL MEETS RECRUITING CRITERIA: Thank you for answering all of my questions. Based on your answers, your background and experiences are a fit for this focus group. I would like to invite you to join a focus group.

We are having focus groups on [INSERT DATES]. The focus group will take about 60 minutes and you will be given up to \$75 for participating.

We have the following days and times available. Let me know what works best for you.

▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time

IF NO:

Okay, is it okay if I call you if other days and times become available? {GO TO END SCRIPT A}

CONFIRM APPOINTMENT

So, let me confirm that you are agreeing to participate in a focus group about your experiences with choosing, enrolling in, and using a qualified health plan or QHP offered through the Health Insurance Marketplaces on {*Date and time*}.

CONFIRM RESPONDENT'S INFORMATION

Now, let me just verify the spelling of your name and your email address so we can send you a confirmation email with an information sheet about the focus groups and a technology tips sheet.

Name: _____

Email Address: _____

If you have any questions or find that you can't attend, please let us know right away at {*insert email address*}. Thank you for your time and for agreeing to help.

END SCRIPT A (GENERIC THANK AND END):

I appreciate your taking the time to speak with me and I hope you have a good day.

END SCRIPT B (FOR PEOPLE WHO DO NOT MEET SELECTION CRITERIA):

Thank you very much for answering my questions. As I said earlier, we're trying to recruit people with specific characteristics and a mix of backgrounds. Unfortunately {*you do not meet our selection criteria OR we already have enough people in our focus group with backgrounds that are similar to yours*}. I appreciate your taking the time to speak with me and I hope you have a good day.

END SCRIPT C

Thank you very much for answering my questions. I need to check with my supervisor to verify whether you are eligible for this focus group. If you are, I will call you back to schedule.

QHP Issuer recruitment guidelines

- Recruit to have 12 individuals for 10 participants to show up and participate in focus group (estimating up to 2 “no shows”)
- Each interview will last 60 minutes and be conducted by telephone
- General screening criteria for all interviews:
 1. Work for a qualified health plan that is currently active in the Marketplace
 2. Work in quality improvement or management for at least one year
 3. Have interest in providing input on health quality measures and how best to present the information
 4. When possible, responsible for designing consumer materials for the Marketplace

QHP Issuer screener

INTRO WHEN PERSON ANSWERS THE PHONE:

Hello, may I please speak with *[FIRST AND LAST NAME]*? My name is *[RECRUITER FIRST AND LAST NAME]*, and I'm calling on behalf of the American Institutes for Research (also known as A-I-R), a nonprofit research organization.

IF RESPONDENT NOT AVAILABLE EITHER:

- DETERMINE A GOOD TIME TO CALL BACK OR
- LEAVE MESSAGE ON ANSWERING MACHINE

ANSWERING MACHINE SCRIPT:

Hello, my name is *[RECRUITER FIRST AND LAST NAME]*. I'm calling on behalf of the American Institutes for Research, a nonprofit research institute. We would like for you to participate in a focus group to hear about how you are using the QHP Enrollee Survey results and data and to get your input on potential changes to the survey. Please call *{INSERT PHONE NUMBER}* at your convenience.

IF RESPONDENT IS AVAILABLE, IDENTIFY REASON FOR CALLING.

I'm calling today about focus groups that we are conducting to learn how QHP issuers are using the QHP Enrollee Survey results and data and to get your input on potential changes to the survey.

If you are interested in helping with this project, and you meet the requirements for participation, we will invite you to participate in an online focus group using Zoom. It would take one and a half hours of your time.

May I ask you a few questions to see if you meet our criteria for interview participants?

IF NEEDED, EXPLAIN FURTHER: We need to include people with specific characteristics and experiences so that we end up with a mix of people with different backgrounds. So I have to ask you some questions to see if you fit the profile of participants that AIR is looking for in the interviews.

IF YES, CONTINUE TO QUESTION 1. IF NO, THANK & END (END SCRIPT A).

Before we begin, I'd like to let you know that all information you provide will be held in confidence. Your participation is voluntary, and you may ask me to skip any questions that you do not wish to answer. You can stop at any time. None of the information that you provide to us will be used for any purpose outside of this focus group.

1. Does your insurance company currently offer any products in the Health Insurance Marketplace(s)/ Exchanges?

☐ YES ☐ NO

2. What is your title?

3. Does your primary role at the health plan include any of the following?

Quality measurement and/or improvement (collection, analysis, or reporting)

Enrollee experience (patient satisfaction evaluation and/or improvement, grievances/complaints)

Marketing (Development of materials for potential consumers)

Management/Strategy/Network adequacy (determining services to provide to enrollees)

{If no to all, THANK AND END, END SCRIPT B}

4. How long have you worked in quality improvement or management, patient satisfaction, public reporting, or developing materials for consumers in the Marketplace?

_____ *{If less than 1 year, THANK AND END, END SCRIPT B}*

INVITATION IF INDIVIDUAL MEETS RECRUITING CRITERIA: Thank you for answering all of my questions. It looks like you're eligible to participate in the focus group.

We are conducting 60-minute online focus groups on [Dates] using Zoom. Would any of the following dates or times work for you?

▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time
▪ Option: Date, time	▪ Option: Date, time	▪ Option: Date, time

IF NO:

Okay, is it okay if I call you if other days and times become available? {GO TO END SCRIPT A}

CONFIRM APPOINTMENT

So, let me confirm that you are agreeing to participate in a focus group about how you are using the QHP Enrollee Survey results and data and to get your input on potential changes to the survey on *{Date and time}*.

CONFIRM RESPONDENT'S INFORMATION

Now, let me just verify the spelling of your name and your email address so we can send you a confirmation letter, the current QHP Enrollee Survey, and information sheet about the focus group. We will not use this information for any purpose outside of this focus group.

Name: _____

Email Address: _____

If you have any questions or find that you can't attend, please let us know right away at *{insert email address}* so that we can find a replacement. Thank you for your time and for agreeing to help.

END SCRIPT A (GENERIC THANK AND END):

I appreciate your taking the time to speak with me and I hope you have a good day.

END SCRIPT B (FOR PEOPLE WHO DO NOT MEET SELECTION CRITERIA):

Thank you very much for answering my questions. As I said earlier, we're trying to recruit people with specific characteristics and a mix of backgrounds. Unfortunately *{you do not meet our selection criteria OR we already have enough people in our focus group with backgrounds that are similar to yours}*. I appreciate your taking the time to speak with me and I hope you have a good day.

END SCRIPT C

Thank you very much for answering my questions. I need to check with my supervisor to verify whether you are eligible for this research focus group. If you are, I will call you back to schedule.