

# **MCBS MAIN STUDY**

R70 General Specifications for MR

## **QUESTIONNAIRE FLOW**

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# 1. SPECIFICATION COMPONENTS

<b>Questionnaire</b>	Refers to the entire set of questions administered to an SP. The Questionnaire is also referred to as the “ <b>Instrument</b> ” when referring to the CAPI program.
<b>Section</b>	Refers to a subset of questions in the Questionnaire. Groups of related questions in the Questionnaire are organized into sections. Each section has a <b>SECTION ID</b> (abbreviation). Ex: the HI Section collects data about the SP’s Health Insurance plans. A Section may be administered every round, only once a year, are only when the SP is entering or exiting the study.

## COMPONENTS OF THE QUESTIONNAIRE:

<b>Introduction</b>	<b>IN Introduction</b>  Verifies SP name, collects SP status and respondent information.  Verifies/collects SP’s DOB, marital status, # children in the SP’s 1 <sup>st</sup> round interview.  Verifies SP’s marital status every fall round.
<b>Address Verification</b>	<b>AV Address Verification</b>  Verifies SP’s home and mailing address.  INTTYPE = 1,4,5,6,7,10: Administered after IN.  INTTYPE = 2,3: Administered directly before CL.
<b>Household</b>	Collects information regarding who lives in the household with the SP.  <b>ENS Enumeration Summary</b>  Reviews persons who lived in the household in the previous round and probes whether or not person still lives in the household in the current round. Also collects new current round household members. Collects job status for SP and household members.
<b>Health Insurance</b>	Collects information about plans that cover SP’s medical expenses.

**HIS Health Insurance Summary**

Allows interviewer to add, delete, and update Health insurance plans collected in previous round.

**HI Health Insurance**

Collects information about Medicare, Medicaid, Tricare, Public and Private Health Insurance Plans.

**Utilization**

Collects dates for SP's doctor visits, Hospital stays, etc. Each visit is referred to as an "event". Also collects other types of medical events, such as prescribed medicines and other medical expenses.

The following sections collect events for a specific type of provider:

**DU Dental**

**ER Emergency Room**

**IP Inpatient Hospital Stays**

**OP Outpatient Department Visits**

**IU Institutionalization Stays**

**HHS Home Health Care Summary**

**HH Home Health Care**

**MP Medical Provider Visits**

**OM Other Medical Expenses**

**PMS Prescription Medicine Summary**

**PM Prescription Medicines**

**Cost Series**

**In Round 70, these sections were not asked.** Collects information regarding medical statements and charges for doctor visits and other events:

**ST Statement Section.**

Collects data directly from SP's statements that they have received from Medicare or other health insurance plan.

**PS Post Statement Section**

Identifies if SP has incurred charges for a OME Rent-to-Buy item. Response to questions in PS determine if event will be asked about in the NS Section.

**NS No Statement Section.**

Collect data from Respondent about the COSTs for a particular event when a Statement is not available.

**CPS Cost Payment Summary Section.**

Reviews ST and NS data collected over past 2 rounds and updates/collects additional COST data not previously reported.

See details below regarding the when COST data is collected for events.

**Summary Sections**

Some of the sections above are referred to as a Summary Section. There are two types of summary sections.

1) A section that allows interviewer to add, delete or update data collected during the SP's previous round interview. Data collected in these sections is written to previous round database records.

**HIS Health Insurance Summary**

**PMS Prescription Medicine Summary**

2) A section that summarizes data collected in the previous round with the purpose of collecting additional current round data. Data collected in these sections is written to current round database records.

**ENS Enumeration Summary**

**HHS Home Health Care Summary**

**CPS Cost Payment Summary**

**Closing**

Collects SP and Proxy address information, Contact and Future Proxy Information. Includes final instructions to respondent about future interviews.

**AV Address Verification**

Collects/Verifies SP's home and mailing address.

**CL Closing**

Collects/Verifies Proxy, Contact, Future Proxy name and address information. Collects future interview name and phone number. Includes final instructions to respondent regarding future interviews and general closing remarks.

**EX      Exit Closing**

Is administered to SP's during their last interview in the study (exit cases). Includes general closing remarks.

**Supplemental Sections**

Refers to a section that is not administered every round. Typically, Supplemental Sections are administered once a year. However, a Supplemental Section may be administered once in the entire study.

The following are examples of Supplemental Sections:

**Fall Round**

- AC      ACCESS TO CARE**
- HF      HEALTH STATUS AND FUNCTIONING**
- US      USUAL SOURCE OF CARE**
- SC      SATISFACTION OF CARE**
- DI      DEMOGRAPHICS**
- HA      HOUSING CHARACTERISTICS**

**Winter Round**

- KN      BENEFICIARY KNOWLEDGE  
AND INFORMATION NEEDS**

**Summer Round**

- IA      INCOME AND ASSETS**
- PA      PATIENT ACTIVATION**
- RX      DRUG COVERAGE**

**Multiple Round Types**

- MB      MOBILITY OF BENEFICIARIES**

## **2. ORDER SECTIONS ARE ADMINISTERED**

<b>Component</b>	<b>Abbrev.</b>	<b>SECTION Listed in the order the section is administered.</b>	<b>Section Administered in What Round?</b>	<b>Who gets what section based on Interview Type and SP's Status.</b>
Introduction	IN	INTRODUCTION	ALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10
Address Verification	AV	ADDRESS VERIFICATION  * Can be called either after IN or before CL.	ALL	MRES.INTTYPE = 1, 4, 5, 6, 7, or 10 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased.
Household	ENS	ENUMERATION	ALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 9, or 10
Supplemental Section	HA	HOUSING CHARACTERISTICS	FALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased..
Health Ins	HIS	HEALTH INSURANCE SUMMARY	ALL	MRES.INTTYPE = 1, 4, 7, 9, or 10
Health Ins	HI	HEALTH INSURANCE	ALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 9, or 10
Utilization	DU	DENTAL UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	ER	EMERGENCY ROOM UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	IP	INPATIENT UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 8, 9, or 10  *MRES.INTTYPE=8 only receive IP questions if ongoing IP visit from the previous round.
Utilization	OP	OUTPATIENT UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	IU	INSTITUTIONAL UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	HHS	HOME HEALTH SUMMARY	ALL	MRES.INTTYPE = 1, 4, or 9
Utilization	HH	HOME HEALTH UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	MP	MEDICAL PROVIDER UTILIZATION	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Supplemental Section	AC	ACCESS TO CARE SUPPLEMENT	FALL	MRES.INTTYPE = 1, 2, 4, 5, or 6 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased.
Utilization	OM	OTHER MEDICAL EXPENSES	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
Utilization	PMS	PRESCRIBED MEDICINES	ALL	MRES.INTTYPE = 1, 4, or 9
Utilization	PM	PRESCRIBED MEDICINES	ALL	MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10

<b>Component</b>	<b>Abbrev.</b>	<b>SECTION Listed in the order the section is administered.</b>	<b>Section Administered in What Round?</b>	<b>Who gets what section based on Interview Type and SP's Status.</b>
COST Series	ST	STATEMENT CHARGE SERIES	ALL	IF ROUND ^=70 AND MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
COST Series	PS	POST-STATEMENT CHARGE	ALL	IF ROUND ^=70 AND MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10
COST Series	NS	NO STATEMENT CHARGE SERIES	ALL	IF ROUND ^=70 AND MRES.INTTYPE = 1, 2, 4, 5, 6, 7, 9, or 10  (exclude MRES.INTTYPE=8)
COST Series	CPS	CHARGE PAYMENT SUMMARY	ALL	IF ROUND ^=70 AND MRES.INTTYPE = 1, 4, 5, or 9
Supplemental Section	MB	MOBILITY OF BENEFICIARIES	ALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased.
Supplemental Section	AC	ACCESS TO CARE SUPPLEMENT	FALL	MRES.INTTYPE = 3 and  MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased
Supplemental Section	HF	HEALTH STATUS AND FUNCTIONING SUPPLEMENT	FALL	MRES.INTTYPE = 1, 2, 3, 4, 5, or 6 and  MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased
Supplemental Section	SC	SATISFACTION WITH CARE SUPPLEMENT	FALL	MRES.INTTYPE = 1, 2, 3, 4, 5, or 6 and  MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased
Supplemental Section	US	USUAL SOURCE OF CARE SUPPLEMENT	FALL	MRES.INTTYPE = 1, 2, 3, 4, 5, or 6 and  MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Decease
Supplemental Section	DI	DEMOGRAPHICS AND INCOME	FALL	MRES.INTTYPE = 3
Supplemental Section	AH	CONTACT INFORMATION FOR FACILITIES	FALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10
Supplemental Section	KN	BENEFICIARY KNOWLEDGE AND INFORMATION NEEDS	WINTER	MRES.INTTYPE = 1, 2, 4, 5, 6, or 7 and  MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased

Component	Abbrev.	SECTION Listed in the order the section is administered.	Section Administered in What Round?	Who gets what section based on Interview Type and SP's Status.
Supplemental Section	IA	INCOME AND ASSETS SUPPLEMENT	SUMMER	MRES.INTTYPE = 1, 2, 4, 5, 6, 8, 9, or 10
Supplemental Section	PA	PATIENT ACTIVATION SUPPLEMENT	SUMMER	MRES.INTTYPE = 1, 2, 4, 5, 6, 8, 9, or 10 and MRES.SPPROXY = 1/SP and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased.
Supplemental Section	RX	DRUG COVERAGE SUPPLEMENT	SUMMER	MRES.INTTYPE = 1, 2, 4, 5, 6, 9, or 10 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased
Address Verification	AV	ADDRESS VERIFICATION * Can be called either after IN or before CL.	ALL	MRES.INTTYPE = 2 or 3 and MRES.SPALIVE ^= 2/AliveAndInstitute and MRES.SPALIVE ^= 3/Deceased.
Closing	CL	CLOSING	ALL	(MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, or 10) or (MRES.INTTYPE = 8 or 9 and MRES.SPALIVE = 3/Deceased).
Closing	EX	CLOSING FOR EXIT INTERVIEW	SUMMER	MRES.INTTYPE = 8 or 9 and MRES.SPALIVE ^= 3/Deceased.
End	END	END SECTION	ALL	MRES.INTTYPE = 1, 2, 3, 4, 5, 6, 7, 8, 9, or 10

**SUMMARY OF INTERVIEW TYPES:**

MRES.INTTYPE=1/StandardHadPrev  
MRES.INTTYPE=2/NewFromFacility  
MRES.INTTYPE=3/NewFromSupplement  
MRES.INTTYPE=4/StandardSkippedPrev  
MRES.INTTYPE=5/LastRndFacSum  
MRES.INTTYPE=6/LastRndFacBase  
MRES.INTTYPE=7/SupSmp1stTimeUtil  
MRES.INTTYPE=8/ExitInterviewHadPrev  
MRES.INTTYPE=9/ExitInterviewSkipPre  
MRES.INTTYPE=10/SupSmp1stTimeUtilSkipped

**VALID IN ROUNDS:**

ALL  
ALL  
FALL ONLY  
ALL  
ALL  
ALL  
WINTER ONLY  
SUMMER ONLY  
SUMMER ONLY  
SUMMER ONLY