

CUSOM OBGYN Mystery Caller Study

Protocol for Data Calls

August 14 – August 18

Hi team! We will be performing our Mystery Caller phone calls to physicians this week.

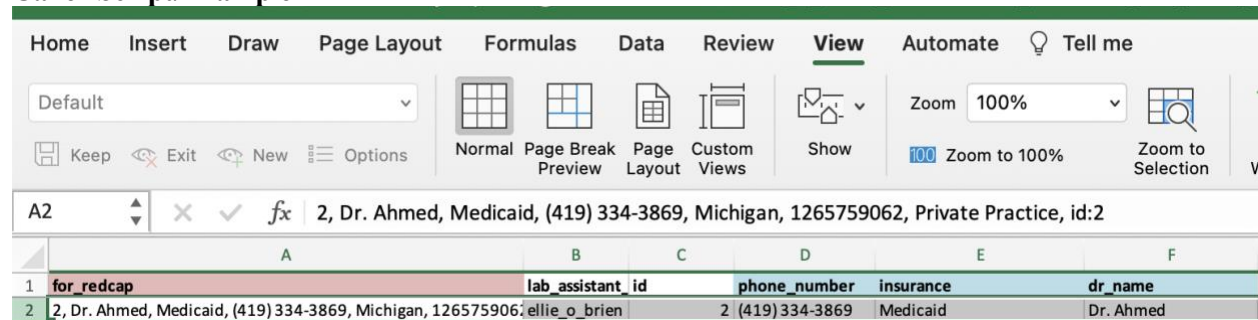
How to Call

Each of you has received a link to an individualized Excel spreadsheet that you will use to make these screening calls starting **Monday, August 14** and ending **Friday, August 18 at 5:00 PM**. On the Excel sheet you will find information regarding the ~178 calls that you have been assigned to complete. Please make your calls during business hours according to each clinic's local time, 8:00 AM – 5:00 PM with no calls made during the lunch hour 12:00 PM to 1:00 PM. **Note:** We will be calling clinics across the U.S., including Alaska and Hawaii. Please keep this in mind and call within business hours according to each clinic's time zone. These data calls will take about 3-5 minutes each, and the goal of these calls is to obtain a date for the next available appointment for your **physician** of interest listed in each row of the Excel sheet. **Pay close attention to the insurance type you are assigned to call about.** You can make your calls any time during business hours of this week, but we recommend doing a portion of your calls every day as these will take some time (we estimate 10-15 hours of calls and data entry during the course of the week). See caller script and example conversation below.

Vignette (reference this if you need more details during your call)

Your mother, Rosa Johns, DOB 4/27/1963 is a 60-year-old post-menopausal woman who needs an appointment as a new patient at a general OB/GYN clinic as she has been having several weeks of new-onset daily vaginal bleeding.

Caller Script/Example



	A	B	C	D	E	F
1	for_redcap	lab_assistant_id	phone_number	insurance	dr_name	
2	2, Dr. Ahmed, Medicaid, (419) 334-3869, Michigan, 1265759062	ellie_o_brien	2 (419) 334-3869	Medicaid	Dr. Ahmed	

Excel spreadsheet shows: Dr. Ahmed, Medicaid, (419) 334-3869

Call (419) 334-3869

“Hello, I’m calling to schedule an appointment for my 60-year-old mother who has [Medicaid/BCBS] and is a new patient to the clinic. She went through menopause a few years ago but has been having vaginal bleeding every day for several weeks now, similar to a period. When is your next available appointment for a new patient for Dr. ***?”

- Could also say “We’ve heard good things about Dr. ***, when is their next available appointment for a new patient?”

Receptionist will give you a date

“Okay, thank you! I need to check my mother’s schedule and will call back to make an appointment.”

Your conversation will likely be something along these lines. You can say what feels natural to you, but please stick to the details of the script (insurance type, symptoms etc.). Your goal is to obtain information regarding the next available appointment date for the **specific physician** you are calling about, but **please DO NOT** actually make an appointment as this will cause administrative burden on our physicians. If you ever get stuck during your conversation and the person on the other end is asking for too much information that you do not know how to respond to – you can make up an excuse and say you have to go, then reach out to Hannah for help. If you have questions or are unsure how to go about these conversations, please reach out to Hannah at Hannah.kyllo@cuanschutz.edu or (623) 249-9220 and she can talk through this with you.

How to Record Data in REDCap

Once you have completed the phone call(s) for a physician, you will complete a data entry for that physician. **Note:** if you had to call a physician's office twice because they did not respond on the first attempt, please only complete one data entry form on REDCap for that physician. **Each row (physician) on your Excel spreadsheet should have ONE REDCap entry form completed.**

1. When you log into REDCap, click on the project “Mystery Caller study to general OBGYNs” on your home page.
2. Click on the “Add/Edit Records” button on the left hand side of your screen.



The screenshot displays the REDCap web application interface. On the left sidebar, under the 'Data Collection' section, the 'Add / Edit Records' button is highlighted with a red circle. The main content area shows the project 'Mystery caller study to general OBGYNs' with PID 28447. The top navigation bar includes 'Project Home', 'Project Setup', 'Other Functionality', and 'Project Revision History'. The header features the CCTSI logo and the text 'Colorado Clinical & Translational Sciences Institute'.

3. Click on the green +Add new record button

The screenshot shows the REDCap interface for the 'Mystery caller study to general OBGYNs' (PID 28447). The left sidebar contains navigation links for Project Home and Design, Data Collection, and Applications. The main content area shows the 'Add / Edit Records' section with a 'Total records: 0' status. Below this, there is a 'Choose an existing Record ID' dropdown menu and a green '+ Add new record' button, which is circled in red.

4. Type in the physician's name or "id:number" from your Excel sheet and you are ready to enter your data. Remember that this step is very important – take caution that you have selected the correct physician AND correct insurance type for your call.

The screenshot shows the 'Mystery Caller Data Entry Form' in REDCap. The form is titled 'Adding new Record ID 1.' and includes a 'Record ID' field with the value '1'. Below this, there is a section for 'Physician Information (see physician name, telephone number, and insurance variable combination)'. The 'TEXT or e-mail Hannah with questions: 623-249-9220, hannah.kylo@cuanschutz.edu, Call Dr. Muffyly with questions: 720-810-9863' is displayed. The 'ahmed' text in the physician name field is circled in red. To the right of the form, there are buttons for 'Save & Exit Form', 'Save & ...', and 'Cancel'.

Important! Do NOT ignore pop-up REDCap notices as this may result in multiple calls to one person or multiple data entries erroneously. Once you are finished with entering your data, change the last question of the form to “complete” and save and exit the form. Once you exit, you should see a “green light”/ green circle next to your record number (entry) confirming that it is complete and saved. You can then begin again at the first step to start another entry for your next call.

Frequently Asked Questions

- What if the receptionist asks for personal information for the patient?
 - In the vignette, you will see a fake patient name and DOB that you can use for your calls (**Rosa Johns, 4/27/1963**) that you can give IF PROMPTED. The receptionist on the phone should not be asking for more medical information beyond this, and if they are you

can tell them that you do not know the information off of the top of your head (i.e. you don't have their insurance ID card/number or social security number on you).

- **What if the physician/office does not take my insurance (for example, the clinic is a Kaiser clinic and does not accept Medicaid coverage)?**
 - In this case, thank the receptionist on the phone and record this physician on REDCap as **excluded** for the reason that they are in a closed system (Kaiser, military etc).
- **What if the OB/GYN specializes in something within their practice (i.e. typically only sees patients with fertility concerns)?**
 - You can respond with something like “I’ve heard great things about Dr. ***, and would like to make an appointment with them if that is possible.” If the receptionist will not allow you to find an appointment time for this doctor, then you will list them as “excluded” on the REDCap form and select one of the reasons given – in this situation could select “**Not accepting new patients**”
- **What if the receptionist offers you an appointment date with another doctor?**
 - If they offer you an appointment date with another doctor, for example in the case that you can get in with that second doctor sooner, politely decline as say something like “I’ve heard great things about Dr. *** and would prefer to see them at their next available appointment, but thank you!” and then proceed to find the next available appointment date for your assigned doctor.
- **What if the phone number is wrong or I call and the physician is no longer practicing at that clinic?**
 - We have thoroughly screened these phone numbers, however, you may still run into numbers that are incorrect, meaning that they do not belong to the physician you are looking for, the physician is no longer practicing etc. In this case, please select an exclusion reason and type any further explanation of why you are excluding the call in the **Notes** section of the REDCap form.
- **What if I call and no one answers the phone?**
 - If your phone call is not answered the first time, please call back the following business day. If the call is not answered the second time, please record your data in REDCap and indicate that you are excluding this physician as the call was not answered.
- **What are strategies to remind me to call again if the phone call was not answered the first time?**
 - If you need to call a number again, one strategy you can use is to change the fill color for that row to “highlight” it in Excel and mark it to remind you to come back and call that number again at a later time.

Remember, please DO NOT actually make an appointment (we just want to know the next available appointment time) and do not divulge anything about this study.

We are happy to answer any questions! Please don't hesitate to reach out.

Hannah Kylo, Cell: (623) 249-9220, Hannah.kylo@cuanschutz.edu