**Mystery Caller Guide**

**Recruiting Mystery Callers**: I contacted the pre-health group/advising center at CU Boulder with a blurb about our study to recruit undergraduate callers. I am happy to provide this contact information. I am also happy to provide a list of our callers and others who have expressed their interest in participating in a future study.

Short Video by Dr. Muffly on Mystery Caller REDCap Protocol: <https://www.youtube.com/watch?v=Y_5VjxPKJF0&ab_channel=TylerMuffly>

**REDCap Codebook:**

A close-up of a data entry form

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\*\*\*Recommended edits to REDCap Tool: Would make Variable #11: “**Was the call included (call where physician was able to be contacted)?”** with a radio button option for 0 “No, call was excluded” and 1 “Yes, call was included”. I would make this a branching variable so that if the caller selects “**No, call was excluded”**, an additional question with a set of reasons for exclusion pop up for completion.

\*\*\*For **“Reasons for Exclusion”**, I would include an “Other” option and a space for callers to fill in if there is another reason for the exclusion not listed.

When you are ready to begin data collection, you will need to move the REDCap project to production (on REDCap). Make sure to do this a few days before your start date at least as this can potentially take a day or two to be processed.

**Sample Communications to Team in Organizing the Study:**

**Email 1 (Approval):**

Dear \*\*\*,

Thank you for reaching out! We would love to have you join our research team for this project.

This aim of this project is to evaluate access to OBGYN care among patients with Medicaid vs. private insurance. The responsibilities of a research assistant are as follows.

1. During the week of **August 7-11** we will be making brief calls to a list of clinic phone numbers to screen if the phone numbers are active/correct. We will provide further instructions and a script for these calls. Research assistants will be asked to screen **~100 phone numbers**, with these calls likely lasting about 1 minute each. These calls can be made any day(s) Monday-Friday that week during business hours, and we will provide a method for you to track these calls and record which ones of active/inactive.
2. During the week of **August 14-18** we will be making official phone calls to clinics to obtain data. These calls will likely last between 3-5 minutes, and we will provide an additional script for these calls. You will be asked to make **~200 phone calls**(approximately 40 per day) during business hours of this week, and again can choose the day(s) and times you decide to make these calls. There is a lot of flexibility with this role - we just ask that you do your best to make all of your assigned phone calls within each week, and if something comes up or if you are worried about completing your calls to reach out and let me know as soon as possible.

Overall this project is very low pressure and a great way to get your foot in the door with research. We are just looking for professional and reliable students who can dedicate some time during these two weeks to help with data collection. We are hoping to submit this manuscript by the end of September. If you are able to complete all calls in the allotted time period, your participation as a research assistant will be compensated with **authorship on the manuscript.** Dr. Tyler Muffly is the physician overseeing this research group, and he and I will take care of the manuscript drafting and submission shortly after all calls have been completed. In the weeks following the calls, you will receive an email from us asking for you to review the manuscript and provide any feedback. We just ask that you respond to this email promptly so that we may submit the manuscript in a timely fashion.

I know that was a lot of details - **If this is still something that you would be interested in, please confirm and I will add you to the group**. If you decide to join, we will set up a meeting sometime in the next week or two to review the protocol and answer any questions prior to the start of the study. I am happy to answer any questions!

We look forward to having you on the team!

Best,

**Hannah Kyllo**

University of Colorado School of Medicine

MD Candidate, Class of 2024

**Email 2 (Details and Logistics for Study Prep):**

Dear \*\*\*,

We are excited to have you on the team for the OBGYN Mystery Caller Study at the University of Colorado School of Medicine. We will be scheduling a team meeting via Zoom next week to review the study protocol, how to make a call, and how to record your data. Please fill out this When2Meet survey with your availability by **Sunday, August 6 at 11:59 PM,**[**https://www.when2meet.com/?20768729-K3Vff**](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.when2meet.com%2F%3F20768729-K3Vff&data=05%7C01%7CHANNAH.KYLLO%40CUANSCHUTZ.EDU%7Ce41a25cd8dcc4627384208db948f9df5%7C563337caa517421aaae01aa5b414fd7f%7C0%7C0%7C638267116790893927%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=9T7Tu%2FuhGlNP4r18nB%2Fe06W0DO%2Fi03%2FnLgjSMEUCkDI%3D&reserved=0).

For this study, we will be using a REDCap database to record our data. If you have not previously made a REDCap account through the University of Colorado Anschutz Medical Campus, please do so by **Sunday, August 6 at 11:59 PM.** To do so, you will need to complete a brief REDCap training consisting of 4 short videos followed by a short quiz. You can begin your REDCap training [here](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fredcap.ucdenver.edu%2Fsurveys%2F%3Fs%3DwcIyV5ajVM&data=05%7C01%7CHANNAH.KYLLO%40CUANSCHUTZ.EDU%7Ce41a25cd8dcc4627384208db948f9df5%7C563337caa517421aaae01aa5b414fd7f%7C0%7C0%7C638267116790893927%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=H6JnxWSbJwT2FsTwjSTZm7qrlpgKRiYgxtf9g%2BcBZMg%3D&reserved=0) (for project manager you can list myself, Hannah Kyllo, username: kylloh). If you would like further instructions on the REDCap training process, you can find it on the CU Anschutz website [here](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcctsi.cuanschutz.edu%2Fresources%2Finformatics%2Fredcap-resources%23tutorials&data=05%7C01%7CHANNAH.KYLLO%40CUANSCHUTZ.EDU%7Ce41a25cd8dcc4627384208db948f9df5%7C563337caa517421aaae01aa5b414fd7f%7C0%7C0%7C638267116790893927%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=m0Qp%2Bj1a9Oa109poNtZAn8zqw5kppuj52nvGHrZcDDo%3D&reserved=0). 

**Please respond to this email with a confirmation that you have REDCap access and with your REDCap username** (once you have completed the training)so that I can add you to the project.

I will send out further information tomorrow (8/3) with step-by-step instructions for our first week of screening calls, **Monday, August 7 - Friday, August 11**. Please reach out if you have any questions about the REDCap training or anything at all! We look forward to working with you.

Best,

**Hannah Kyllo**

University of Colorado School of Medicine

MD Candidate, Class of 2024

**Email 3 (Week 1: Screening Calls Information)**

Hi Team,

Our Mystery Caller Study will be starting this coming Monday, August 7. Starting Monday, we will be performing screening phone calls to determine if the physicians' phone numbers we have are active and correct. Your individualized phone call assignments can be found in the excel spreadsheet linked below. Please see the attached "Screening Calls Protocol" document for step-by-step instructions on how to perform these calls.

**Phone Call Assignments**: [[](https://olucdenver-my.sharepoint.com/:x:/g/personal/hannah_kyllo_cuanschutz_edu/EQznDfw3Vk9FlsWk6qbRTxkBsYlGFh1Di6sgMI1I0jWw5g)(1) Mayu Screening Call List.xlsx](https://olucdenver-my.sharepoint.com/:x:/g/personal/hannah_kyllo_cuanschutz_edu/EQznDfw3Vk9FlsWk6qbRTxkBsYlGFh1Di6sgMI1I0jWw5g)

I will send a reminder email on the morning of Monday, August 7. **Please feel free to reach out with any questions at all!** I am happy to correspond via email or schedule a brief phone call or Zoom meeting if anyone has questions about what they should be doing next week. We will be meeting sometime next week, likely Thursday August 10, to discuss instructions for the second week of the study.

Lastly, I have attached a recent manuscript from our research group that reports a similar Mystery Caller study - our project will be modeled after this but will look at general OBGYN clinics rather than subspecialty clinics. This may be a helpful resource for you to better understand the bigger picture of what we are hoping to do.

Best,

**Hannah Kyllo**

University of Colorado School of Medicine

MD Candidate, Class of 2024

**Email 4 (Week 2: Data Call Instructions)**

Hi Team,

Tomorrow, Monday August 14, we will begin calling clinics for our OB/GYN mystery caller study. Each of you has been assigned ~178 calls to make. Please find a link to an excel spreadsheet with your individualized calling assignments below.

**Phone Call Assignment:** [[](https://olucdenver-my.sharepoint.com/:x:/g/personal/hannah_kyllo_cuanschutz_edu/Ed2q7w_Dwo9JjzaR50rv7UoBVa409EMtKBBWtPRED5nPfg)(1) ellie\_o\_brien\_2023-08-13\_13-28-59\_178\_rows\_2\_to\_1241.xlsx](https://olucdenver-my.sharepoint.com/:x:/g/personal/hannah_kyllo_cuanschutz_edu/Ed2q7w_Dwo9JjzaR50rv7UoBVa409EMtKBBWtPRED5nPfg)

**REDCap Login:** <https://redcap.ucdenver.edu/>

Please see the attached Mystery Caller Protocol for step-by-step instructions on how to make your calls and record your data in REDCap. We did review most of this during our meeting last Thursday, however a few pieces of information are new, based on your excellent questions during the meeting, so **please review the protocol document prior to starting your calls.**I have also attached a link to a video below in which Dr. Muffly talks through the basics of making your calls and recording your data (similar to our discussion on Thursday). Although this video was made for a prior study, the principles are the same, and it can serve as an additional tool to refresh your memory on how to perform these tasks.

**Instructions Video:** <https://www.youtube.com/watch?v=Y_5VjxPKJF0&ab_channel=TylerMuffly>

As a reminder, you will have until **Friday, August 18 at 5 PM** to complete your calls. Whatever you do, please do NOT schedule actual appointments during these calls. Please reach out to me if you have any questions at all, no matter how small. I am here to help and support you!

Best,

**Hannah Kyllo**

University of Colorado School of Medicine

MD Candidate, Class of 2024

**\*\*\*After each day of data calls, I recommend sending a summary email so that callers know what our progress is (this is a great motivator and keeps progress moving along). You can also use these emails to address any common questions/issues that have been arising. Example below:**

**Subject: Monday OBGYN Study Recap**

Cc:​Muffly, Tyler MD​

Mon 8/14/2023 5:59 PM

Hi Team!

Thank you for your hard work today. I know that some of you had a few unexpected scenarios when calling clinics but thank you for reaching out to me for help when needed! I am really impressed with your problem-solving skills and ability to think on your feet in these scenarios. I wanted to share a few of the scenarios you all encountered today and how to troubleshoot them in case they come up again.

1. **The clinic is asking for social security number, mailing address etc. (needs to input full patient info) before giving an appointment date**: the simplest thing to do is let them know that you don't know this information off the top of your head (i.e. mom just moved to the area and you don't know her new address). Then tell them that you are just looking for a rough estimate of the next available appointment. If they are persistent, you can thank them and then exclude this physician.
2. **The clinic is asking for which type of BCBS insurance the patient has:** we recommend telling them that you don't know exactly (and assume it is the most common type) and are just looking for a rough estimate of the next available appointment date.
3. **The clinic tells you that the physician only sees patients for a certain complaint (i.e. fertility concerns) and will not give you an appointment date:** you can exclude this physician using the reason "not accepting new patients" and put a brief explanation in the notes section

Overall, we are at **125 calls completed** which is about**1/10** of the way through our calls. Each research assistant should be averaging approximately 36 calls per day to stay on track. We are a little behind pace after our first day, but I know we had a lot of details to iron out today and we will all get more efficient as the week goes on. I know these calls are time-consuming but hang in there - all of your hard work and hours spent will pay off on Friday when we have a complete data set!

As always, I am here for questions, concerns, or anything at all. Keep up the great work!

Best,

**Hannah Kyllo**

University of Colorado School of Medicine

MD Candidate, Class of 2024