

POMP 4 CAREGIVER SUPPORT AND SATISFACTION SURVEY IMPLEMENTATION INSTRUCTIONS

April 15, 2003

This document presents instructions for the AAA personnel who will be administering and conducting the Caregiver Support and Satisfaction Survey. The AAA personnel conducting the survey should adhere to the following procedures and scripts. (Note: If the caregiver does not speak English, please contact your local survey coordinator for guidance. If a translator is used, please document this on the questionnaire.)

BEFORE YOU START

- **Carefully complete all training exercises with the questionnaire.**
- **Study the Service Definitions Card to obtain a clear understanding of the definitions of each of the services that are being used for the purpose of this survey.**
- **Read through the questionnaire several times to make sure you understand all questions.**
- **Practice reading the questions out loud.**
- **Use the Interviewer Checklist as a guide for remembering key instructions.**
- **Use the Service Definitions Card as a guide if the caregiver has difficulty understanding the names of the services.**

USING THE SAMPLE LIST/ CALLER LOGBOOK

Your survey coordinator should have provided you with a sample list of names of all caregivers to be contacted in this survey. This should be a sample of caregivers from the entire population of eligible caregiver support and clients. This list should include the name, sex, age, and ID for both the caregiver and the care recipient, as well as the caregiver's telephone number.

You must attempt to contact all caregivers on the sample list. Some caregivers may have to be called several times in order to reach them. All attempts to contact a caregiver should be recorded in the logbook, along with the time and date of the call. Please use the logbook to record the status of each attempt to contact the caregiver. In addition, the logbook contains a field called 'Final Result' for reporting issues such as completed interview, the caregiver has not been contacted after five (5) phone calls, caregiver or care recipient is deceased, or that caregiver has refused to complete the questionnaire.

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CALLING THE CAREGIVER

If you reach the person you are calling, please read the introduction provided on the questionnaire as written, **before** administering the questionnaire:

Hello. May I please speak to [CAREGIVER'S NAME]? My name is [INTERVIEWER'S NAME] from [AGENCY'S NAME]. We are conducting a survey to find out how we can help meet the needs of caregivers and seniors being served by [AGENCY'S NAME]. We got your name from [AGENCY'S NAME]. Your name is listed as someone who currently provides care for [CLIENT'S NAME]. Are you the primary caregiver for [CLIENT'S NAME]?

(IF NO) Who is the primary caregiver for [CLIENT'S NAME]? **(Get and record:**

Caregiver name: _____

Caregiver's telephone number: |_|_|_| - |_|_|_| - |_|_|_|_|

Thank the respondent and terminate the interview.)

(IF YES) Are you at least 18 years old?

(IF NO) So you are **younger** than 18 years old. Is there any other person providing care for [CLIENT'S NAME]?

(IF YES) (Get and record:

Caregiver name: _____

Caregiver's telephone number: |_|_|_| - |_|_|_| - |_|_|_|_|

Thank the respondent and terminate the interview.)

(IF YES) I would like to ask you some questions about your caregiving activities.

This survey typically takes about 25 minutes; some people want to talk more, others talk less. You may be more comfortable answering these questions if you are NOT currently in the presence of the person you are caring for. Is this a good time for you?

(IF NO) What is another time that is better for you?

(Get time and phone number where they can be reached.)

Day: _____ Time: ___:___ AM PM Date: ___/___/___

Telephone number? |_|_|_| - |_|_|_| - |_|_|_|_|

(Confirm time and phone number where they can be reached. Terminate interview.)

(IF YES) Now let's begin the caregiver survey. I want to tell you that your participation is voluntary and very important to the success of this study. Your answers to the questions will be kept confidential to the extent the law allows and will be used only for the purpose of this study. Your eligibility for services will not be affected by your decision to participate nor by any answers you give.

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If you get the person's answering machine, please read the following message into the answering machine: "This is [INTERVIEWER'S NAME] calling on behalf of [AGENCY'S NAME]. We are conducting a survey to find out how we can help meet the needs of caregivers and seniors being served by [AGENCY'S NAME]. It is very important that we speak with you. We will call back within the next few days. Thank you."

If the caregiver is not at home but someone else answers the phone, just tell the person who answers that you will call the caregiver back. Ask the person if they know when would be a good time to reach the caregiver. Mark this call in the caller logbook as an unsuccessful attempt.

If you call and no one answers, mark this in the caller logbook as an unsuccessful attempt.

If you call and get a busy signal, mark this in the caller logbook as an unsuccessful attempt.

If you don't reach the caregiver on the first call, make at least four (4) **more** attempts to contact them on different days of the week and at different times of the day (i.e., morning, afternoon).

ADMINISTERING THE QUESTIONNAIRE

Before asking any questions, read the introductory script at the beginning of the survey. Some respondents may be reluctant to answer certain questions if the care recipient is close enough to overhear the interview. If the caregiver tells you that this is a bad time to talk, ask them to tell you a better time for them to talk and call them back then.

Read the questions exactly as written.

- **If the caregiver asks for clarification on a service definition question (Questions 4 through 17),** you may clarify a service definition for them, using the Service Definitions Card as your guide.
- **If the caregiver asks for clarification on a question that does not refer to a specific service,** please tell them that they should answer the question in terms of what it means to them. Other than providing clarifications by way of Service Definitions, do NOT try to explain what the question means to you.
- **If the caregiver does not know the answer a question,** write don't know (DK) to the right of the question.
- **If the caregiver refuses to answer a question,** write refused (RF) to the right of the question.

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NOTE: For many people, caregiving is any extremely emotional experience. You may be the first person to have asked them how they feel about caregiving. About half of the caregivers interviewed in our pretest cried at some point during the interview. **BE PREPARED FOR THE EMOTIONAL IMPACT THAT THESE QUESTIONS MAY HAVE ON SOME RESPONDENTS.** You may have to wait at times for a respondent to compose himself or herself before continuing with the interview.

Last question: Additional assistance

Some caregivers will be unaware that Area Agencies on Aging and other service organizations provide assistance to caregivers. If the interviewee appears to be struggling with or extremely stressed by caregiving tasks, **get their address and telephone number** so that information can be provide to them promptly.

IMMEDIATELY AFTER THE QUESTIONNAIRE IS FILLED OUT

- Thank the caregiver for responding. End the interview.
- **REVIEW YOUR WORK!** Make sure that all questions are completely and legibly answered. If not, someone should call the caregiver back to obtain the missing information.
- In the Office Use Only memo box at the bottom of the first page of the survey, indicate:
 - the method for administering the questionnaire (Telephone or Mail),
 - the Interview Date,
 - the Client ID,
 - the Client Enrollment Date, and
 - the Caregiver ID.
- In the Caregiver Sample List/Caller Logbook, record the 'Final Result'(Result Code) of the call.
- Store the completed questionnaires in a dedicated file or folder. On a weekly basis, all questionnaires and a copy of the logbook should be delivered to the AAA survey coordinator for processing. The AAA survey coordinator will be responsible for the coding of the questionnaires, the data entry process, and final storage of all materials related to this survey. (Coding is a process that occurs before actual data entry. It involves making sure the questionnaire follows the codebook rules (such as entering a "9" for a missing answer or upcoding an "other" response if it fits into one of the given answer categories).)