CL. CLOSING MATERIALS

7/18/02 – last revised
MCBS Comm. (Round 34 Main)

MCBS MAIN STUDY - ROUND 34, FALL 2002

COMMUNITY COMPONENT

CL. CLOSING MATERIALS

BOX CL1	IF THIS IS SP'S EXIT INTERVIEW, GO TO SECTION EX. OTHERWISE, IF THE SP IS DECEASED OR INSTITUTIONALIZED (INS1=3 OR 2) AND PROXY'S ADDRESS HAS BEEN PREVIOUSLY COLLECTED, GO TO CL4a. IF THE SP IS DECEASED OR INSTITUTIONALIZED (INS1=3 OR 2) AND PROXY'S ADDRESS HAS NOT BEEN COLLECTED, GO TO CL4. IF SP IS ALIVE, NOT INSTITUTIONALIZED (INS1=1), GO TO CL1.

CL1.   Next, I would like to verify (your/SP's) home address and phone number(s). I have them listed as . . . [READ ADDRESS AND PHONE NUMBER(S) LISTED BELOW]. Are these correct?

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YES ................................................................... 1  (CL3a)
NO .................................................................... 2  (CL2)
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CL2.   [ENTER CORRECT ADDRESS AND PHONE NUMBER(S).]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]
[ENTER "XXX" FOR STREET ADDRESS TO ERASE PREVIOUS ENTRY ON SECOND LINE.]
[PRESS ENTER FOR FIELDS WITH NO CORRECTIONS.]

BOX CL2	IF CHANGE WAS MADE TO SP'S PHONE NUMBER ONLY, OR IF NO CHANGES MADE AT CL2, GO TO CL3a. OTHERWISE, GO TO CL3.

CL3.   INTERVIEWER: WAS CHANGE MADE TO SP'S ADDRESS BECAUSE SP MOVED?

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YES ................................................................... 1
NO .................................................................... 2
REFUSED .......................................................... -7
DON'T KNOW ................................................... -8
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CL3a.   Is this the correct mailing address for (you/SP)?

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YES ................................................................... 1   BOX CL3
NO .................................................................... 2   (CL3b)
REFUSED .......................................................... -7   BOX CL3
DON'T KNOW ................................................... -8   BOX CL3
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CL3b.   What is (your/SP's) mailing address?
[ENTER "XXX" FOR STREET ADDRESS TO ERASE PREVIOUS ENTRY ON SECOND LINE.]
[PRESS ENTER FOR FIELDS WITH NO CORRECTIONS.]

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BOX CL3	IF SP IN ORD SAMPLE OR DUAL ELIGIBLE SAMPLE, GO TO CL19. OTHERWISE, IF SP IS RESPONDENT (SPPROXY = 1), AND SP HAS A PHONE NUMBER, OR PHONE NUMBER WAS GIVEN AT CL6 OR CL10 DURING PREVIOUS ROUND, GO TO CL9. IF SP IN ORD SAMPLE OR DUAL ELIGIBLE SAMPLE, GO TO CL19. OTHERWISE, IF SP IS RESPONDENT (SPPROXY = 1), AND SP DOES NOT HAVE A PHONE NUMBER OR PHONE NUMBER MISSING, GO TO CL5. IF PROXY IS RESPONDENT (SPPROXY = 2), AND PROXY IS IN SP'S HOUSEHOLD AND SP/PROXY HAS A PHONE NUMBER, OR PHONE NUMBER WAS GIVEN AT CL6 OR CL10 DURING PREVIOUS ROUND, GO TO CL9. (PROXY'S AND SP'S ADDRESS FIELDS SHOULD CONTAIN SP'S ADDRESS.) IF PROXY IS RESPONDENT (SPPROXY = 2), AND PROXY IS IN SP'S HOUSEHOLD AND SP/PROXY DOES NOT HAVE A PHONE NUMBER, GO TO CL5. (PROXY'S AND SP'S ADDRESS FIELDS SHOULD CONTAIN SP'S ADDRESS.) IF PROXY IS RESPONDENT (SPPROXY = 2), AND PROXY IS NOT IN SP'S HOUSEHOLD AND PROXY'S ADDRESS HAS NOT BEEN COLLECTED, GO TO CL4. IF PROXY IS RESPONDENT (SPPROXY = 2), AND PROXY IS NOT IN SP'S HOUSEHOLD AND PROXY'S ADDRESS HAS BEEN COLLECTED, GO TO CL4a.

CL4.   What is your address and phone number?
[PROBE: Is there a second phone number where you can be reached?]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]

CL4a.   I'd like to verify your address and phone number(s). I have them listed as . . .[READ ADDRESS AND PHONE NUMBER(S) LISTED BELOW]. Are these correct?

YES .... 1 *BOX CL4*
NO 2 (CL4b)

CL4b.   [ENTER CORRECT ADDRESS AND PHONE NUMBER(S).]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]
[ENTER "XXX" FOR STREET ADDRESS TO ERASE PREVIOUS ENTRY ON SECOND LINE.]
[PRESS ENTER FOR FIELDS WITH NO CORRECTIONS.]

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BOX CL4	IF SP IN ORD SAMPLE OR DUAL ELIGIBLE SAMPLE, GO TO CL19. OTHERWISE, IF SP DECEASED OR INSTITUTIONALIZED (INS1=2 OR 3), GO TO CL25. IF PROXY HAS A PHONE NUMBER THAT IS NOT=MISSING IN ANY FIELD, GO TO CL9. IF PROXY DOES NOT HAVE A PHONE NUMBER OR IF PROXY PHONE NUMBER MISSING (CL4 OR CL4a TELEPHONE NUMBER = 999, REF, DK), AND SP HAS A PHONE NUMBER (PREV. ROUND CL1 (AREA CODE ≠ 999, REF, DK)), OR PHONE NUMBER WAS GIVEN AT CL6 OR CL10 DURING PREVIOUS ROUND, GO TO CL9. IF PROXY DOES NOT HAVE A PHONE NUMBER OR IF PROXY PHONE NUMBER MISSING AND SP DOES NOT HAVE A PHONE NUMBER (PREV. ROUND CL1 (AREA CODE) = 999, REF, DK), GO TO CL5.

CL5.   As you may know, the Medicare Current Beneficiary Survey involves another interview. The next interview will be similar to the one we had today. We will be calling in about 4 months to set up a convenient time for the next interview.

Is there a phone number to call to arrange for the next interview?

YES 1   (CL6)
NO 2   **BOX CL4A**
REFUSED .... -7   **BOX CL4A**
DON'T KNOW .... -8   **BOX CL4A**

CL6.   What is that phone number?

(_____) _____ - _____
PHONE NUMBER

CL7.   And where is that phone located?

PROXY'S OR SP'S HOME 1   **BOX CL4A**
PROXY'S OR SP'S WORK/OFFICE 2   **BOX CL4A**
NEIGHBOR'S 3   (CL8)
FRIEND'S 4   (CL8)
RELATIVE'S 5   (CL8)
REFUSED .... -7   **BOX CL4A**
DON'T KNOW .... -8   **BOX CL4A**
SOMEWHERE ELSE (SPECIFY) _____ 91   **BOX CL4A**

CL8.   What is this (RESPONSE IN CL7) name? [ENTER ONLY ONE.]

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CL8a.   Under what name is that telephone number likely to be listed?

> SAME AS CONTACT NAME
> (CONTACT NAME FROM CL8) .... 1 **BOX CL4A**
> OTHER NAME (SPECIFY) _____ 91 **BOX CL4A**
> REFUSED .... -7 **BOX CL4A**
> DON'T KNOW .... -8 **BOX CL4A**

CL9.   As you may know, the Medicare Current Beneficiary Survey involves another interview. The next interview will be similar to the one we had today. We will be calling in about 4 months to set up a convenient time for the next interview.

And is (SP'S/PROXY'S PHONE NUMBER) the best phone number to call to arrange for the next interview?

> YES .... 1 **BOX CL4A**
> NO 2 (CL10)
> REFUSED .... -7 **BOX CL4A**
> DON'T KNOW .... -8 **BOX CL4A**

CL10.   What is the best number to call to arrange for the next interview?
         [ENTER "999" IN AREA CODE IF PERSON DOES NOT HAVE A PHONE.]

> (_____) _____ - _____
> PHONE NUMBER

CL11.   And where is that phone located?

> PROXY'S OR SP'S HOME .... 1 **BOX CL4A**
> PROXY'S OR SP'S WORK/OFFICE .... 2 **BOX CL4A**
> NEIGHBOR'S 3 (CL12)
> FRIEND'S 4 (CL12)
> RELATIVE'S 5 (CL12)
> REFUSED .... -7 **BOX CL4A**
> DON'T KNOW .... -8 **BOX CL4A**
> SOMEWHERE ELSE (SPECIFY) _____ 91 **BOX CL4A**

CL12.   What is this (RESPONSE IN CL11) name? [ENTER ONLY ONE.]

CL12aa. Under what name is that telephone number likely to be listed?

> SAME AS CONTACT NAME
> (CONTACT NAME FROM CL12) 1
> OTHER NAME (SPECIFY) _____ 91
> REFUSED .... -7
> DON'T KNOW .... -8

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BOX CL4A	GO TO CL13 IF: SUPPLEMENTAL SAMPLE, NO PREVIOUS CONTACTS, ONE PREVIOUS CONTACT AND CONTACT IS CURRENT ROUND PROXY, ALL PREVIOUS CONTACTS ARE CURRENT ROUND HOUSEHOLD MEMBERS, ALL PREVIOUS CONTACTS DELETED. OTHERWISE, GO TO CL12a.

CL12a.   During our last interview we recorded name and address information for [READ NAME(S) BELOW], who would know where (you/SP) could be contacted in case we have trouble arranging for the next interview.

CONTACT 1:   (NAME)
CONTACT 2:   (NAME)

Is this information still correct?
[CODE ALL THAT APPLY.]
[PRESS CTRL/L TO LEAVE SCREEN.]

YES, ALL INFORMATION CORRECT .... 1 *BOX CL4B*
NO, NEED TO REPLACE CONTACT ONE 2 (CL12b)
NO, NEED TO CORRECT INFO FOR CONTACT ONE 3 (CL12c)
NO, DELETE CONTACT ONE - NO REPLACEMENT .... 4 *BOX CL4B*
[NO, NEED TO REPLACE CONTACT TWO.. 5 (CL12b)]
[NO, NEED TO CORRECT INFO FOR CONTACT TWO............................. 6 (CL12c)]
[NO, DELETE CONTACT TWO - NO REPLACEMENT] .... 7 *BOX CL4B*

CL12b.   [Please give me the name of a relative or close friend who would know where (you/SP) would be. Please give me the name of someone who is not living with (you/SP).]
[ENTER ONLY ONE CONTACT].

CL12bb.   [Please give me an address and phone number for contacting (CL12b NAME).]
[PROBE: Is there a second phone number where this contact person can be reached?]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]

CL12cc.   [(XXX) XXX-XXXX]
Under what name is (the first/that) telephone number likely to be listed?

SAME AS CONTACT NAME (CONTACT NAME FROM CL12b) 1
OTHER NAME (SPECIFY) _____ 91
REFUSED .... -7
DON'T KNOW .... -8

BOX CL4A1	IF TWO PHONE NUMBERS COLLECTED AT CL12bb (I.E., BOTH PHONE NUMBERS ? 999 OR REF), GO TO CL12cc1. OTHERWISE, GO TO *BOX CL4B.*

CL12cc1. [(XXX) XXX-XXXX]
          Under what name is the second telephone number likely to be listed?

              SAME AS CONTACT NAME (CONTACT NAME FROM CL12b) 1
              OTHER NAME (SPECIFY) _____ 91
              REFUSED .... -7
              DON'T KNOW .... -8

CL12c.   [ENTER CORRECT ADDRESS AND PHONE NUMBER(S).]
          [ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]
          [ENTER "XXX" FOR STREET ADDRESS TO ERASE PREVIOUS ENTRY ON SECOND LINE.]
          [PRESS ENTER FOR FIELDS WITH NO CORRECTIONS.]

BOX CL4A2	IF ANY FIRST PHONE NUMBER FIELD(S) MODIFIED AND AREA CODE ? 999 OR REF, AND SECOND PHONE NUMBER MODIFIED OR COLLECTED, GO TO CL12d. IF ANY SECOND PHONE NUMBER FIELD(S) COLLECTED OR MODIFIED, AND AREA CODE ? 999 OR REF, AND FIRST PHONE NUMBER NOT MODIFIED, GO TO CL12e. OTHERWISE, GO TO **BOX CL4B**.

CL12d.   [(XXX) XXX-XXXX]
          Under what name is (the first/that) telephone number likely to be listed?

              SAME AS CONTACT NAME (CONTACT NAME FROM CL12a) 1
              OTHER NAME (SPECIFY) _____ 91
              REFUSED .... -7
              DON'T KNOW .... -8

BOX CL4A3	IF SECOND PHONE NUMBER MODIFIED OR COLLECTED AT CL12c, AND SECOND PHONE NUMBER ? 999 OR REF, GO TO CL12e. OTHERWISE, GO TO **BOX CL4B**.

CL12e.   [(XXX) XXX-XXXX]
          Under what name is (the second/that) telephone number likely to be listed?

              SAME AS CONTACT NAME (CONTACT NAME FROM CL12a) 1
              OTHER NAME (SPECIFY) _____ 91
              REFUSED .... -7
              DON'T KNOW .... -8

BOX CL4B	IF MORE THAN ONE CODE ENTERED AT CL12a, GO TO THE NEXT APPROPRIATE QUESTION FOR THAT CODE. IF ONLY ONE CODE ENTERED AT CL12a OR WHEN CL12b/CL12c COMPLETED FOR EACH CODE ENTERED AT CL12a, GO TO **BOX CL4B1a**.

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BOX CL4B1a	IF CODE 1, 2, OR 3 ENTERED AT CL12a AND THERE IS NO SECOND CONTACT FROM A PREVIOUS ROUND, GO TO CL16. OTHERWISE, GO TO **BOX CL4B1**.

CL13. (Besides yourself), please give me the name, address, and telephone number of a relative or close friend who would know where (you/SP) would be in case we have trouble arranging for the next interview. Please give me the name of someone who is <u>not living</u> with (you/SP).

    RESPONDENT REPORTS A CONTACT NAME 1 (CL14)
    RESPONDENT DID <u>NOT</u> REPORT A CONTACT NAME .... 2 **BOX CL4B1**
    REFUSED.. -7 **BOX CL4B1**
    DON'T KNOW .... -8 **BOX CL4B1**

CL14. [Please give me the name of a relative or close friend who would know where (you/SP) would be. Please give me the name of someone who is not living with (you/SP).]
[ENTER ONLY ONE.]

CL15. [Please give me an address and phone number for contacting (CL14 NAME).]
[PROBE: Is there a second phone number where this contact person can be reached?]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]

CL15a. [(XXX) XXX-XXXX]
Under what name is (the first/that) telephone number likely to be listed?

    SAME AS CONTACT NAME (CONTACT NAME FROM CL14) 1
    OTHER NAME (SPECIFY) _____ 91
    REFUSED .... -7
    DON'T KNOW .... -8

BOX CL4B1b	IF TWO PHONE NUMBERS COLLECTED AT CL15 (I.E., BOTH PHONE NUMBERS ? 999 OR REF), GO TO CL15b. OTHERWISE, GO TO CL16.

CL15b. [(XXX) XXX-XXXX]
Under what name is the second telephone number likely to be listed?

    SAME AS CONTACT NAME (CONTACT NAME FROM CL14) 1
    OTHER NAME (SPECIFY) _____ 91
    REFUSED .... -7
    DON'T KNOW .... -8

CL16. Please give me another name, address, and telephone number of a relative or close friend who would know where (you/SP) would be in case we have trouble arranging the next interview. Again, please give me the name of someone who is <u>not living</u> with (you/SP).

    RESPONDENT REPORTS A CONTACT NAME 1 (CL17)
    RESPONDENT DID <u>NOT</u> REPORT A CONTACT NAME .... 2 **BOX CL4B1**
    REFUSED.. -7 **BOX CL4B1**
    DON'T KNOW .... -8 **BOX CL4B1**

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CL17.   [Please give me another name of a relative or close friend who would know where (you/SP) would be. Again, please give me the name of someone who is not living with (you/SP). ENTER ONLY ONE.]

CL18.   [Please give me an address and phone number for contacting (CL17 NAME).]
[PROBE: Is there a second phone number where this contact person can be reached?]
[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]

CL18a.   [(XXX) XXX-XXXX]
Under what name is (the first/that) telephone number likely to be listed?

        SAME AS CONTACT NAME (CONTACT NAME FROM CL17) 1
        OTHER NAME (SPECIFY) _____ 91
        REFUSED .... -7
        DON'T KNOW .... -8

BOX CL4B1c	IF TWO PHONE NUMBERS COLLECTED AT CL18 (I.E., BOTH PHONE NUMBERS ? 999 OR REF), GO TO CL18b. OTHERWISE, GO TO **BOX CL4B1**.

CL18b.   [(XXX) XXX-XXXX]
Under what name is the second telephone number likely to be listed?

        SAME AS CONTACT NAME (CONTACT NAME FROM CL17) 1
        OTHER NAME (SPECIFY) _____ 91
        REFUSED .... -7
        DON'T KNOW .... -8

BOX CL4B1	IF NEW SAMPLE OR PREVIOUS CL19 = 2, REF, DK, OR PREVIOUS CL19a = 3, GO TO CL19. OTHERWISE, GO TO CL19a.

CL19.   (Do you/Does SP) have another home, such as a vacation home, where (you/SP) spend part of the year?

        YES 1 (CL20)
        NO .... 2 **BOX CL4B2**
        REFUSED .... -7 **BOX CL4B2**
        DON'T KNOW .... -8 **BOX CL4B2**

CL19a.   [CODE "YES" IF ALREADY KNOWN. OTHERWISE ASK:]
I would like to verify the address and phone number of (your/SP's) vacation home. I have them listed as. . .
[READ ADDRESS AND PHONE NUMBER LISTED BELOW]. Are these correct?

        YES 1 (CL21)
        NO 2 (CL20)
        SP NO LONGER HAS 2ND HOME 3 (CL21)

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CL20.　　[What is the correct address and phone number of that home?]
　　　　[ENTER "999" IN AREA CODE IF PERSON DOES NOT HAVE A PHONE.]
　　　　[ENTER "XXX" FOR STREET ADDRESS TO ERASE PREVIOUS ENTRY ON SECOND LINE.]
　　　　[PRESS ENTER FOR FIELDS WITH NO CORRECTIONS.]

BOX CL4B2	IF SP IN ORD SAMPLE OR DUAL ELIGIBLE SAMPLE, GO TO CL25a. OTHERWISE, GO TO CL21.

CL21.　　During our remaining interviews, we will continue to collect information about health care visits and the costs of any health care (you/SP) may receive. If for some reason you could not do the interview, please give me the name of someone who would be able to provide this information for (you/SP).

SOMEONE NAMED 1 (CL22)
NO ONE TO NAME .... 2 **BOX CL4E**
REFUSED TO NAME SOMEONE .... 3 **BOX CL4E**
DON'T KNOW .... -8 **BOX CL4E**

CL22.　　[Please give me the name of someone who would be able to provide this information for (you/SP).] [ENTER ONLY ONE PERSON.]

CL22a.　　[Please give me an address and phone number for contacting NAME FROM CL22.]
　　　　[PROBE: Is there a second phone number where this contact person can be reached?]
　　　　[ENTER "999" IN AREA CODE(S) IF PERSON DOES NOT HAVE A PHONE.]

CL22b.　　[(XXX) XXX-XXXX]
　　　　Under what name is (the first/that) telephone number likely to be listed?

SAME AS CONTACT NAME (CONTACT NAME FROM CL22) 1
OTHER NAME (SPECIFY) _____ 91
REFUSED .... -7
DON'T KNOW .... -8

BOX CL4B3	IF TWO PHONE NUMBERS COLLECTED AT CL22a (I.E., BOTH PHONE NUMBERS ? 999 OR REF), GO TO CL22c. OTHERWISE, GO TO **BOX CL4E**.

CL22c.　　[(XXX) XXX-XXXX]
　　　　Under what name is the second telephone number likely to be listed?

SAME AS CONTACT NAME (CONTACT NAME FROM CL22) 1
OTHER NAME (SPECIFY) _____ 91
REFUSED .... -7
DON'T KNOW .... -8

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BOX CL4E	IF SUPPLEMENTAL SAMPLE, GO TO CL23a. OTHERWISE, IF SP IS RESPONDENT (SPPROXY = 1), GO TO CL23. IF PROXY IS RESPONDENT (SPPROXY = 2), GO TO CL24.

CL23.   [I would like to thank you for keeping the calendar for this interview.] I would [also] appreciate it if you would [continue to] record health care visits and keep information about medical expenses for the next interview. Thank you for your time and cooperation during this interview.

CIRCLE TODAY'S DATE ON CALENDAR AS A REFERENCE FOR THE RESPONDENT. EXPLAIN CALENDAR SECTIONS AS NECESSARY. [TO LEAVE SCREEN, PRESS ENTER.]

BOX CL4F	GO TO CL26.

CL23a.   I would like to give you this calendar [HAND CALENDAR TO RESPONDENT] to record any health care visits (you have/SP has) with any kind of medical professional or facility.

Here is a folder to keep any medical bills, receipts, Medicare statements, and insurance statements that would be connected to (your/SP's) health care visits and other medical expenses so that we can talk about them during the next interview. I'd like to thank you for your time and cooperation and I look forward to seeing you soon.

CIRCLE TODAY'S DATE ON CALENDAR AS A REFERENCE FOR THE RESPONDENT. EXPLAIN CALENDAR SECTIONS IN DETAIL TO RESPONDENT.

[PRESS ENTER TO CONTINUE.]

BOX CL4F1	GO TO CL26.

CL24.   I would like to make sure you are aware of the calendar we use to record health care visits as well as the folder for keeping information about medical expenses for the next interview.

CIRCLE TODAY'S DATE ON CALENDAR AS A REFERENCE FOR THE RESPONDENT. EXPLAIN CALENDAR SECTIONS IN DETAIL TO RESPONDENT.

[PRESS ENTER TO CONTINUE.]

CL25.   I would like to thank you for your time and cooperation during this interview. We may be contacting you in the future for further information. [PRESS ENTER TO CONTINUE.]

BOX CL4F2	IF SP IN ORD SAMPLE OR DUAL ELIGIBLE SAMPLE, GO TO CL25a. OTHERWISE, GO TO CL26.

CL25a.   Those are all the questions that I have for you. You have made a very important contribution to the Medicare program and all of its beneficiaries by talking with us today about (your/SP's) medical care. Thank you very much for your time and effort.

                              [PRESS ENTER TO CONTINUE.]

CL26.   INTERVIEWER: WAS THIS INTERVIEW CONDUCTED MOSTLY IN ENGLISH, SPANISH, OR SOME OTHER LANGUAGE?

          LANG   ENGLISH 1
                                  SPANISH 2
                                  OTHER (SPECIFY) _____ 91

CL27.   PLEASE WAIT. CASE IS IN SAVING PROCESS.
[FINSCRO]
          REMIND RESPONDENT THAT SOMEONE FROM THE HOME OFFICE MAY BE CALLING TO VALIDATE INTERVIEW.

          THIS CASE IS CODED (CODE) – COMPLETE (DECEASED).

          PRESS ENTER TO RETURN TO THE MAIN MENU.

BOX CL5	CODE CASE AS COMPLETED.