

Increasing Participation by Underserved Populations in the Medicare Current Beneficiary Survey

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Background

- Underserved populations are historically harder to reach and to retain in health survey research
- Obtaining interviews with these populations often requires tailored outreach and gaining cooperation techniques and additional effort
- Fall 2023 Field Test on MCBS: assess the utility and effectiveness of tailored outreach efforts to complete more interviews with underserved populations

Enhanced Outreach to Underserved Populations

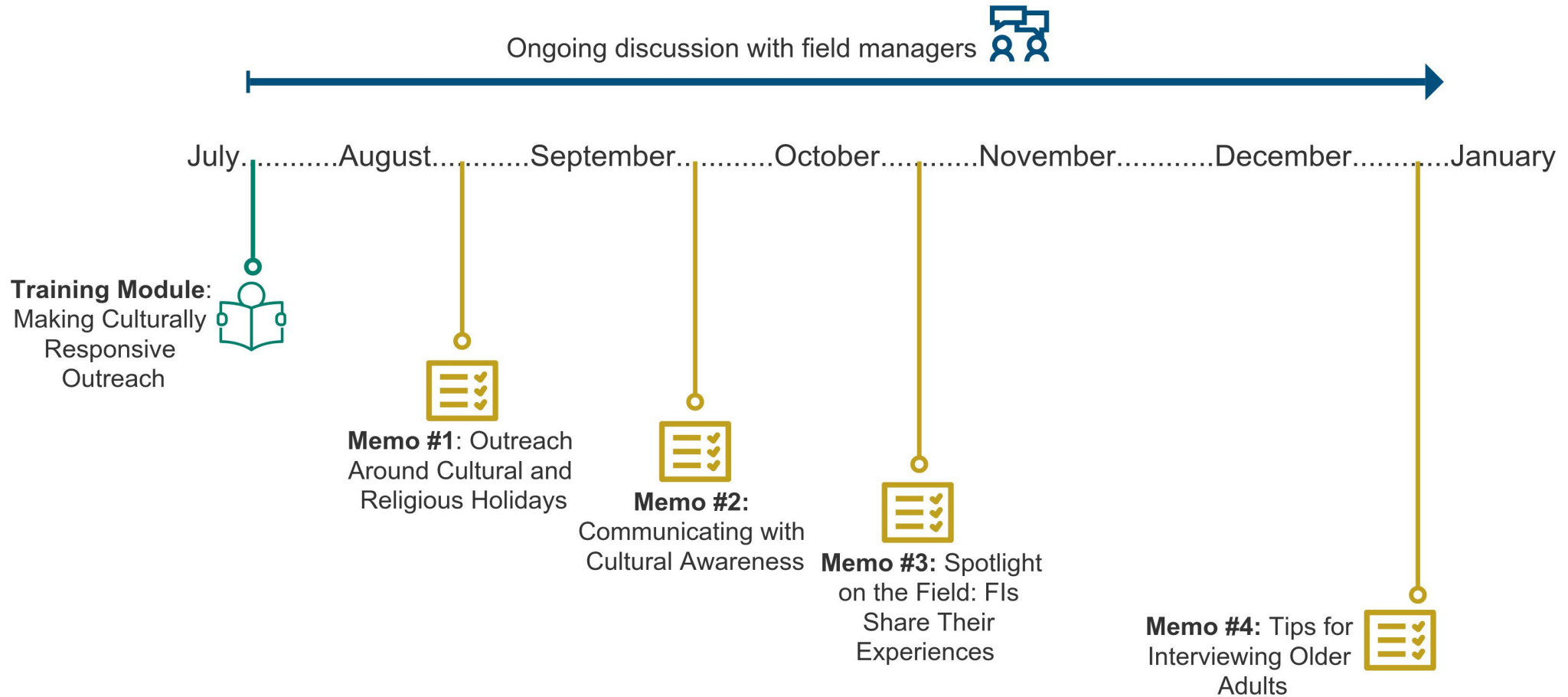
Goal: increase participation by beneficiaries of color, particularly Hispanic, Black, or Asian beneficiaries in the MCBS

Fall 2023 data collection: July 17- Dec 31, 2023

Planned activities included:

1. Training in cultural responsiveness
2. Respondent materials / Targeted priority mailings
3. Focus on in-person outreach / Dedicated travel to under-staffed areas

1. Training in Cultural Responsiveness



Example Interviewer Training Material

Let's start by defining what culture is



The concept of culture is used to describe the everyday practices and beliefs that shape human behavior.

Culture is commonly thought of as things like art, religion, music, and fashion. However, culture is more than this! Culture is:

- Learned (People are not born with culture. It must be taught).
- Patterned (Based on shared understanding amongst a group of people).
- Symbolic (Can include abstract concepts that shape everyday life).

Some examples of culture are shown in the graphic to the left.

What is culturally responsive research?

Culturally responsive research addresses how to make the research process more inclusive of diverse perspectives, values, and beliefs. It addresses key questions in research such as:

- Who benefits from the research?
- Who is represented in the research?
- How legitimate is the research to diverse populations?

You may have heard the term "cultural competence," which means maintaining "a set of attitudes, perspectives, behaviors, and policies - both individually and organizationally - that promote positive and effective

Let's review the difference between a couple of terms we will use in this module. Click on the flashcards below to understand the terms listed.

Race refers to a group sharing some outward physical characteristics and some commonalities of culture and history.

Ethnicity refers to markers acquired from the group with which one shares cultural, traditional, and familial bonds.

While **race** is ascribed to individuals on the basis of physical traits, **ethnicity** encompasses everything from language, to nationality, culture, and

Hispanic versus Latino

With the support of OMH, we plan to increase outreach to those who

The United States isn't a place with one culture. There is a lot of diversity, including significant linguistic (language) diversity.

The MCBS has Field Interviewers working across the entire United States.

An obvious cultural difference you may encounter is the diverse ways people speak.

Regional dialects are in part a result of multiple waves of migration to this country.

- Have you experienced linguistic diversity firsthand?
- Can you think of any examples of regional language variation in the U.S.?



Watch the video below for some history on the development of distinct dialects in the U.S. before moving on with the lesson.

MCBS Training Module: Making Culturally Responsive Outreach

0% COMPLETE

☰ Making Culturally Responsive
Outreach



NON-VERBAL COMMUNICATION

VERBAL COMMUNICATION

- Consider if certain days/times are more culturally or religiously appropriate to approach the home.
- Take a step back from the respondent to create space when conversing.
 - Different cultures have different expectations when it comes to personal space - and that's ok! Try to be respectful of someone's preference while still ensuring your own comfort.
- If you are on stairs, take a step down to appear less threatening.
- Keep good eye contact, but briefly look away approximately every 5 seconds to avoid seeming aggressive.
- Dress in clothing viewed as "professional" or culturally appropriate for the region and neighborhood where you work. For example, some communities may be wary of police or immigration authorities and dressing in a manner that looks too "official" may be problematic.



MCBS Training Module: Making Culturally Responsive Outreach

100% COMPLETE

≡ Making Culturally Responsive
Outreach



NON-VERBAL COMMUNICATION

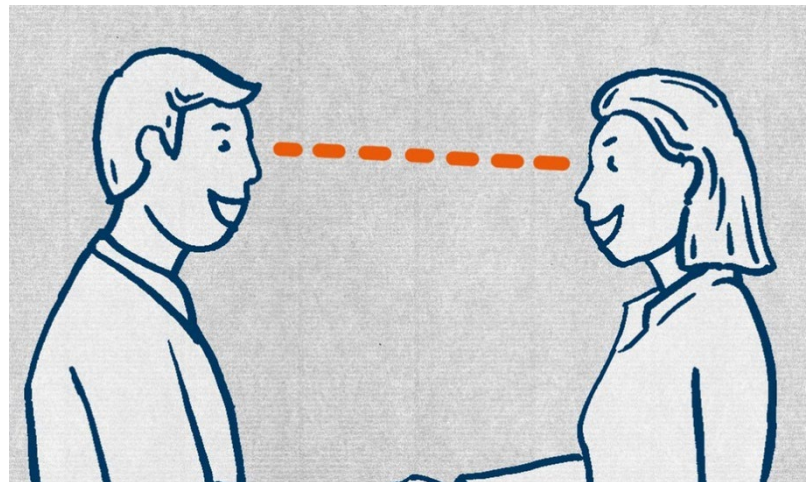
VERBAL COMMUNICATION

- Pay attention to how someone introduces themselves, and be respectful of how they ask you to refer to them:
 - Did they introduce themselves in a more formal way (i.e., not with first name)?
 - Did they share pronouns?
- Use shared language: Avoid slang and jargon, and instead use day-to-day vocabulary.
- Take your time - don't jump to conclusions. Allow the respondent to finish what they are saying.
- Be well-prepared to introduce yourself & the MCBS, including descriptions of:
 - NORC at the University of Chicago
 - The concept of a survey - we are looking to hear from the beneficiary about **their** experiences

Example from Field Memo #4: Tips for Interviewing Older Adults

General & In-Person Interviewing Tips

Regardless of their age, do not approach respondents with any expectation of physical or mental impairment. Instead, pay attention to the specific needs of the respondent and be prepared to adjust interviewing techniques accordingly. *We discuss strategies for doing so in this memo.*



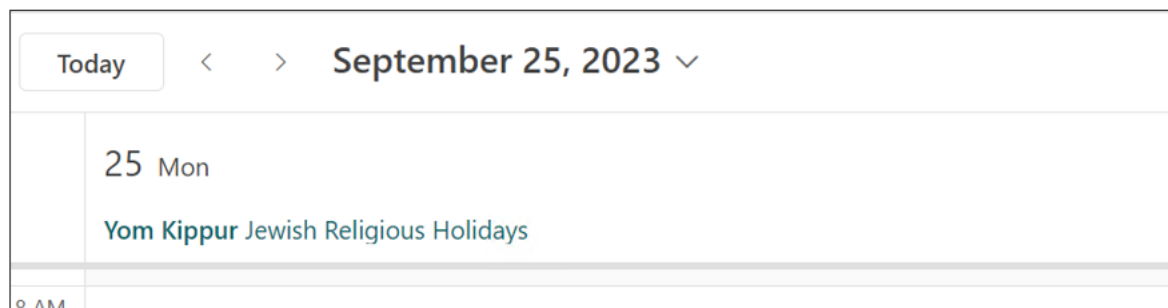
Example Interviewer Training Material

Tracking Cultural and Religious Holidays

It can be important to consider different religious and cultural holidays when making outreach. For example, certain days may not be appropriate for outreach with certain groups.

Your Outlook calendar has a feature which allows you to add cultural and religious holidays. This can help you keep track of holidays and celebrations that may be important to beneficiaries in your area.

You can use the steps on the next slides to add these dates to your Outlook calendar.



Memo item shared instructions for adding cultural and religious holidays to Outlook calendars to aid in planning outreach.

2. Respondent Materials / Targeted Reminder Mailings

Getting Help in a Language Other than English



You are invited to participate in a research survey about Medicare. This interview can be conducted in English or Spanish. A friend or relative can also complete the interview on your behalf. Call us at 1-844-777-2151 to schedule an appointment to contribute to this important national effort.

Vous êtes invité(e) à participer à une enquête sur l'assurance Medicare. Cet entretien peut être mené en anglais ou en espagnol. Un ami ou un parent peut également répondre à l'entretien en votre nom. Contactez-nous au 1-844-777-2151 pour prendre rendez-vous et contribuer à cet important effort national.

Iniiimbitahan kang makilahok sa isang survey na pananaliksik tungkol sa Medicare. Puwedeng isagawa ang panayam na ito sa English o Spanish. Puwede ring gawin ng isang kaibigan o kamag-anak ang panayam para sa ngalan mo. Tawagan kami sa 1-844-777-2151 para mag-iskedyul ng appointment para makapag-ambag sa mahalagang pambansang gawain na ito.

您受邀参加一项关于 Medicare（联邦医疗保险）的研究调查。访谈过程中可以使用英语或西班牙语。也可以由您的朋友或亲属代表完成访谈。请致电 1-844-777-2151 进行预约，为这一重要的全国性工作做出贡献。

您受邀參加一項關於 Medicare（聯邦醫療保險）的研究調查。本訪談可以使用英語或西班牙語進行。也可以由朋友或親戚代表您進行訪談。請致電 1-844-777-2151 與我們聯絡預約訪談，為這項重要的全國性工作做出貢獻。

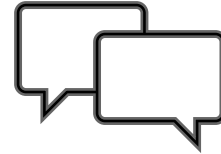
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3. Focus On In-Person Outreach

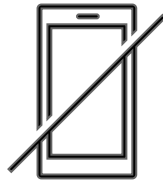
- All cases flagged as Black, Hispanic, or Asian were recommended for in-person outreach
- Over 80% of these cases received at least one in-person contact attempt.



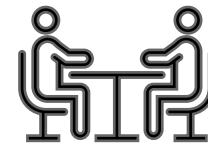
Assists in locating beneficiaries



Ability to convert refusals on the spot



Removes digital divide



Easier to overcome language barriers

Using Google Translate in the Field

English ↔ Vietnamese

Does anyone here speak English? You have been selected to participate in an interview about Medicare.

Ở đây có ai nói tiếng Anh không? Bạn đã được chọn để tham gia cuộc phỏng vấn về Medicare.

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English ↔ Vietnamese

Thank you. I am leaving you with more information about this important study. Please give it to them.

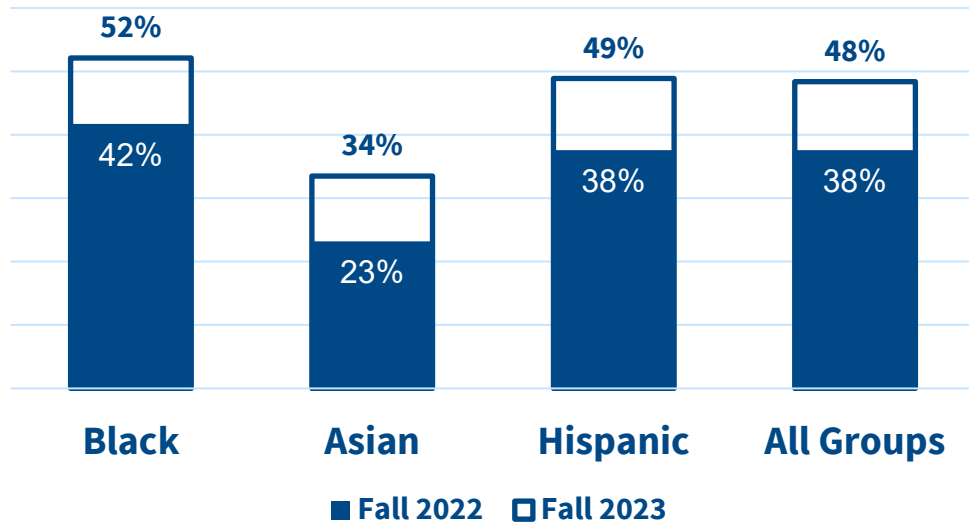
Cảm ơn. Tôi sẽ để lại cho bạn thêm thông tin về nghiên cứu quan trọng này. Hãy đưa nó cho họ.

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[Open in Google Translate](#) • [Feedback](#)

Results

Response Rates Increased by 10+ Percentage Points



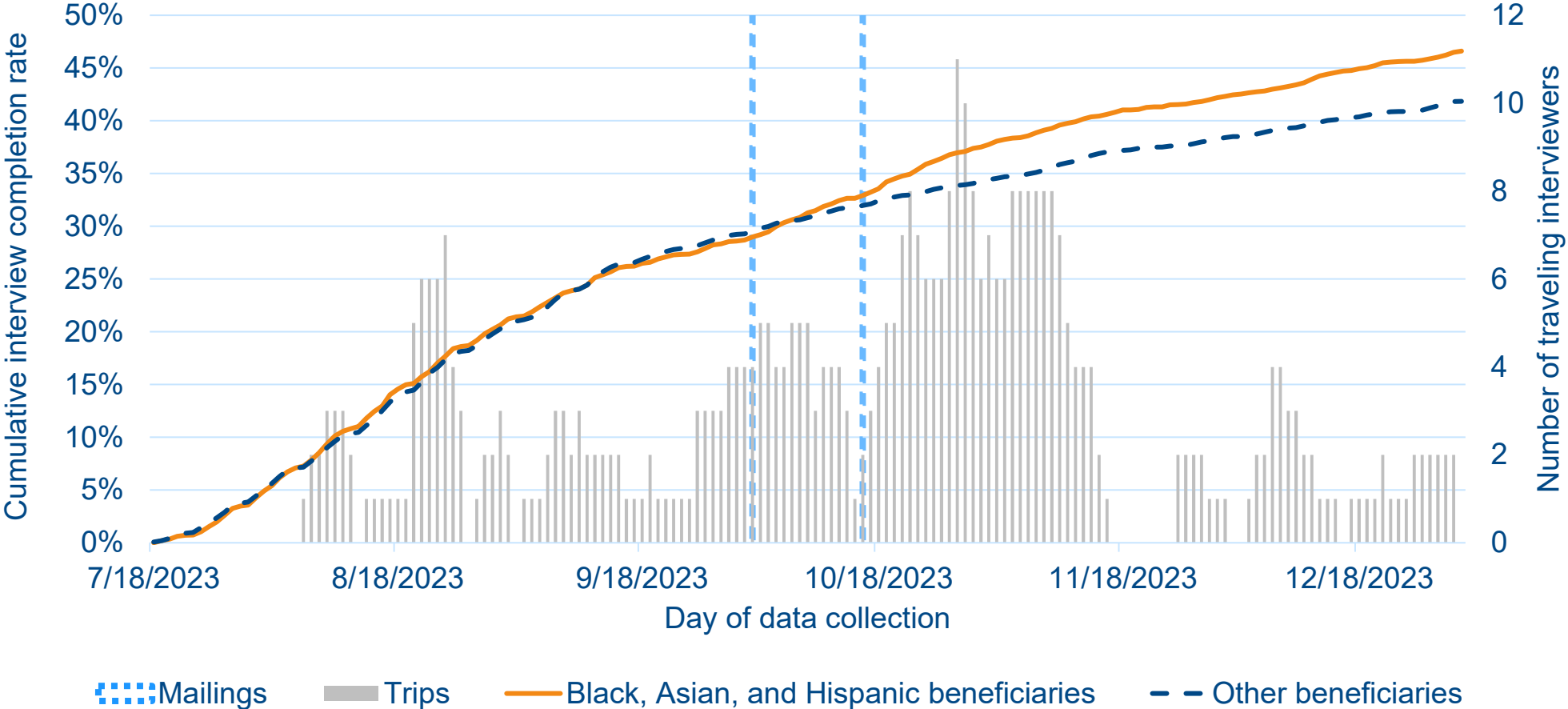
Survey response **increased** for all groups of interest in Fall 2023, yielding higher sample sizes.

- +10 percentage points for Black beneficiaries
- +11 percentage points for Hispanic beneficiaries
- +11 percentage points for Asian beneficiaries
- +10 percentage points overall for all beneficiaries of color

Response rates over time

Fall Round	All	Combined Minority	Non-Minority	Black	Asian	Hispanic
2019 (R85)	55.13%	54.37%	55.36%	59.81%	39.33%	52.91%
2020 (R88)	41.61%	39.38%	42.32%	44.17%	29.54%	37.61%
2021 (R91)	38.01%	35.98%	38.66%	38.42%	24.64%	36.94%
2022 (R94)	38.23%	37.57%	38.45%	41.67%	23.25%	37.56%
2023 (R97)	45.02%	48.37%	43.85%	52.06%	33.54%	48.93%
2023/R97 response compared to all in-person (2019)	-10.11%	-6.00%	-11.51%	-7.75%	-5.79%	-3.98%

Priority mailings and travel to specific areas increased participation



Feedback from Interviewers and Respondents

The interview provided me tremendous empathy for people who live... within multi-generational households. I was welcomed by entire household, after numerous visits and phone calls. I was even offered breakfast. With little space to conduct the interview; I sat on the couch with tablet in left hand, laptop on lap and mouse sitting next to me on the right side of my lap.

I was invited to complete an [interview] into the home of a married couple who had been selected together in a two-respondent household. Their daughter was visiting and happy to Proxy for her non-English speaking parents. However, she wasn't knowledgeable about their insurance. She called her brother, the homeowner, to ask him. He got on the phone with me, and despite his surprise and some concern that I was in his home, he was able to recall the mailing and willingly provided the insurance information. I gave him a little more background on the MCBS, and he then continued to assist for the entire interview, as he was more up to date on his parents' care than his sister was.

“I made an in-person visit to a Hispanic case. No one came to the door, so I left a packet with the Advance Letter. After not getting a response, I made a second person visit. This time, the respondent and his wife were home. Unfortunately, neither of them spoke or understood English. After reading the Spanish letter, I was able to get them to understand that I would get someone on my phone that could speak in Spanish. One of region 3's Spanish speaking interviewers spoke to the respondent and his spouse on my phone, explained the study and set a phone appointment for later that day. The process worked perfectly, and the interview was completed. Even though I didn't complete the interview, I felt a great sense of accomplishment! Very nice experience. It's all about teamwork!”

—● Data Collection in Fall 2024 and Beyond

- Making respondent materials available in more languages
- Expanded use of Google Translate to identify a knowledgeable proxy
- Text messages in Spanish
- Additional training calls with a specific focus on gaining cooperation with Hispanic beneficiaries

● Future Work

- A combination of enhanced outreach techniques were effective in achieving increases completion among Black, Hispanic, or Asian Medicare beneficiaries
- Each of these components will be important for future efforts to increase recruitment and maintain participation among individuals in these groups on the MCBS
- CMS is using lessons learned / materials that were developed as part of this project to improve the amount and quality of data on underserved populations available for research on health disparities



Questions or comments?

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