

***Please fill in the necessary data for [MONTH YEAR]**

Cumulative numbers from the beginning of your MFP program until the date indicated below	Baselines	One Year Follow-Ups	Two Year Follow-Ups
<u>Completed</u> from start of program until [END OF PREVIOUS MONTH]	All baselines completed in your state since beginning an MFP program	All One Year Follow-Up surveys (11 months after transitioning) completed in your state since beginning an MFP program	All Two Year Follow-Up surveys (24 months after transitioning) completed in your state since beginning an MFP program
<u>Refused</u> from start of program until [END OF PREVIOUS MONTH]	All beneficiaries who transitioned into the community, but refused to take the survey after the transition	All MFP-enrolled beneficiaries who completed the baseline survey, but refused to take the follow-up survey 11 months after transitioning	All MFP-enrolled beneficiaries who completed the baseline survey, but refused to take the follow-up survey 24 months after transitioning
<u>Missed</u> from start of program until [END OF PREVIOUS MONTH]	All beneficiaries who transitioned into the community, but were not administered the survey due to factors such as (but not limited to): <ul style="list-style-type: none"> • Interviewers were unable to locate the beneficiary • Interviewers were unable to reach the beneficiary within 15 attempts • Beneficiary's paperwork was misplaced • An interviewer forgot 	All MFP-enrolled beneficiaries who completed the baseline survey, but were not administered the follow-up survey due to factors such as (but not limited to): <ul style="list-style-type: none"> • Interviewers were unable to locate the beneficiary • Interviewers were unable to reach the beneficiary within 15 attempts • Beneficiary's paperwork was misplaced • An interviewer forgot 	All MFP-enrolled beneficiaries who completed the baseline survey, but were not administered the follow-up survey due to factors such as (but not limited to): <ul style="list-style-type: none"> • Interviewers were unable to locate the beneficiary • Interviewers were unable to reach the beneficiary within 15 attempts • Beneficiary's paperwork was misplaced • An interviewer forgot
<u>Lost</u> (died, out of state, etc.) from start of program until [END OF PREVIOUS MONTH]	All beneficiaries who transitioned into the community, but died or moved out of state before a baseline was administered within the appropriate time frame.	All MFP-enrolled beneficiaries who completed the baseline survey, but died or moved out of state before the 11-month follow-up survey was administered within the appropriate time frame.	All MFP-enrolled beneficiaries who completed the baseline survey, but died or moved out of state before the 24-month follow-up survey was administered within the appropriate time frame.
<u>Completed</u> from start of program until [END OF THIS MONTH, LAST YEAR]	All baselines completed in your state from the beginning of the program to the end of this month last year.		
<u>Completed</u> from start of program until [END OF THIS MONTH, TWO YEARS AGO]	All baselines completed in your state from the beginning of the program to the end of this month two years ago.		

Just to clarify, the last two rows of the table asks for the **cumulative number of completed baselines from the beginning of your MFP program until THE END OF THIS MONTH, LAST YEAR and the **cumulative number** of completed baselines from the beginning of your MFP program until THE END OF THIS MONTH, TWO YEARS AGO. This information is necessary for us to track the percentage of completed first year follow-ups and second year follow-ups.

Helpful Hints:

Timing of Surveys

- We highly recommend administering baseline surveys no earlier than 1 month before transition and no later than 2 weeks after transition. Make every effort to conduct the baseline survey prior to the participant's transition into the community.
- Follow-up surveys (both 11- and 24-month) should be administered after the initial transition into the community, even if the participant disenrolled or moved back into a managed care organization after transitioning.
 - At the 24 month mark, most participants will be ineligible for MFP, so eligibility status doesn't affect the timing of follow-up interviews.
 - For example, for an initial transition on 11/3/2010, the first follow-up should be done about 11 months later and the second follow-up about 24 months later, regardless of where the person is living or the person's MFP eligibility status (the person has to be alive). The first follow-up for this individual should be completed around 11/3/2011 and the second follow-up around 11/3/2012.
- Make every effort to complete follow-up surveys no more than 60 days post-11 and -24 month follow-up dates. Keep in mind follow-up dates are based on the beneficiary's transition date and not the baseline date.

Who Receives Surveys

- You should attempt to complete the first follow-up survey for MFP participants, regardless if they missed or refused the baseline survey. If a participant missed the baseline, hopefully we can use their 1st and 2nd follow-ups for comparison.
- Follow-up surveys will not be conducted for non-MFP participants (i.e. those who never transition out of managed care).

Administration Tips

- When using the paper version of the survey for the baseline interview, you may want to cross out questions labeled "after transition" to avoid asking them accidentally.
- If you are a new interviewer, practice a few times before conducting the interview. This should help ease any anxiety and help you follow the skip patterns correctly.
- Before conducting a proxy interview, reassure the proxy that he/she should not guess. It is better if he/she states he/she doesn't know.
- Ask questions as written (the manual has suggested probes if a respondent does not seem to understand the question).
- If a participant is potentially harmful to him/her self or others, immediately discuss this with your supervisor. Do not attempt to administer the survey until you have discussed the situation with him or her.

Managing Data

- Develop a tracking database (e.g., access, excel) so you know how many attempts you have made to contact each respondent and the status of each case.
- Obtaining the correct Medicaid ID is EXTREMELY important.
- Recording whether the interviewee was a proxy is EXTREMELY important.

Frequently Asked Questions (FAQs):

1. *How soon is too soon to conduct the QoL survey (baseline)?*

Although we strongly encourage you to complete the baseline no more than one month before transition, it is better to collect this data earlier than after transition. Responses are qualitatively different when the baseline interview is done after the respondent moves to the community. In addition, many transitioning participants have difficulties with recall. We understand that the transition date can change several times for a variety of reasons (e.g., housing accommodations aren't ready yet) and that some potential MFP participants may not end up transitioning. Therefore, please find ways that work with your transition processes to conduct the baseline interview before participants transition to the community—even if that means conducting the interview a month or more before transition. If, despite all your best efforts, a participant transitions before you can complete the baseline interview, however, try to complete within two weeks of the person's move to the community. In this instance, some data are better than no data.

2. *If the participant was interviewed at baseline but did not transition do we conduct a follow-up?*

No. Follow-up interviews should only be conducted for those people who completed the baseline interview and transitioned to community living through the MFP program.

3. *If the participant was interviewed at baseline, transitioned, but at any point was hospitalized, do we still conduct the follow-up interview?*

Yes, but if the participant is in the hospital around the 11th month and will be discharged in less than 6 weeks, we recommend you wait to conduct the follow-up interview until that person is back in the community. If the hospitalization will be much longer than 6 weeks, then conduct the follow-up interview in the hospital when the person is stabilized.

4. *If a respondent doesn't know an answer or is not sure do we leave it blank or choose "don't know?"*

Choose "don't know."

5. *If a participant can't communicate a response or a proxy doesn't know well enough how to respond should we leave it blank or choose "don't know?"*

Choose "don't know."

6. *Participants in my program live all over the state- sometimes it takes hours of travel to obtain one follow-up interview. Do we have to conduct follow-up interviews in person?*

Please attempt to conduct all Quality of Life interviews in person. With this population there can be a lot of difficulties with phone interviews. Some participants will share a phone with others or feel uncomfortable talking on the phone. However, we recognize that it might be impossible in certain states (e.g., driving 20 hours to conduct one interview). As there is slightly more leeway in the timing of the follow-up interview, some states are trying to schedule several interviews at the same time within a given region to make their survey resources (interviewer time and travel costs) more manageable and cost effective. If this strategy means that some follow-up interviews are delayed several weeks or a month (or are done early), then a delayed (or early) interview is better than a telephone interview. If after your best efforts you cannot complete a follow-up interview in person, conduct it by telephone. In this instance, "some data are better than no data."