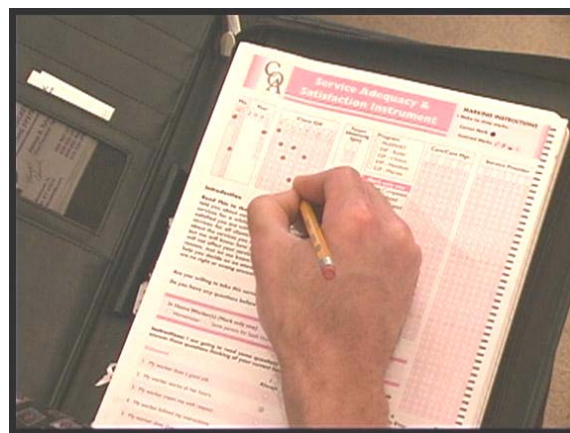
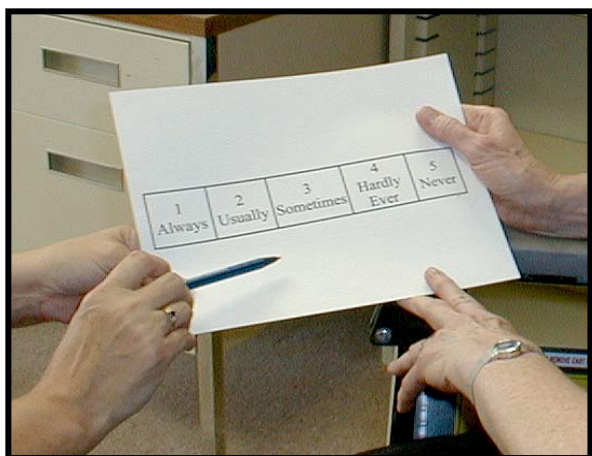


# Training Case Managers to Administer the Service Adequacy & Satisfaction Instrument (SASI)

## *Case Manager Manual*





# **Training Case Managers to Administer the Service Adequacy & Satisfaction Instrument (SASI)**

## ***Case Manager Manual***

**August 2005**

**Content Authored by:**  
Latona Murdoch  
Jane Straker  
Denise Brothers-McPhail

**Additional copies of this manual can be downloaded from:  
[http://www.scripps.muohio.edu/scripps/publications/SASI\\_manual.html](http://www.scripps.muohio.edu/scripps/publications/SASI_manual.html)**



## Acknowledgements

*Funding for this project provided by the  
Ohio Department on Aging*

**Design, Layout, and Project Management by:**  
Denise Brothers-McPhail

**Photography:**  
Tom Fox

*Thanks to the Council on Aging of Southwestern Ohio  
for their valuable comments on the development of these training  
materials, and a special thank-you to those case managers who shared  
their experiences with using the SASI.*

# Table of Contents

<b>ACKNOWLEDGEMENTS</b>	<b>I</b>
<b>FOREWORD</b>	<b>IV</b>
<b>INTRODUCTION</b>	<b>1</b>
Goal of the Consumer Satisfaction Program	1
Purpose of the Training	1
Know the Material	2
What Does A Successfully Trained Research Interviewer Look Like?	2
<b>TRAINING PRESENTATION CONTENT</b>	<b>3</b>
Background of the Consumer Satisfaction Project	3
Research Terminology	4
Becoming a Research Interviewer	4
Preparing Yourself for the Interview	5
<i>Who to Interview?</i>	5
<i>Completing the Survey Form</i>	6
Preparing Your Client for the Interview	7
<i>Setting-up the Physical Environment</i>	7
<i>Introducing the Survey to Your Client</i>	7
Conducting the Interview	7
<i>General Tips</i>	7
<i>Transitioning from One Service to the Next</i>	8
<i>Home Delivered Meals Service</i>	8
<i>Comment Section for Home Care and Delivered Meals</i>	8
<i>Service Adequacy Section</i>	8
An Example of a Basic Interview	8
<i>Skills</i>	9
<i>Interview Preparation</i>	9
<i>Training the Client to Use the Response Set</i>	9
<i>Acceptable Ways for the Client to Respond</i>	9
<i>Repeating the Response Choices</i>	10
Handling Challenging Clients & Situations	10
<i>Keeping Clients on Track</i>	10
<i>Probes</i>	10
Probing when a client asks the meaning of a question	10
Probing when a client gives an example to answer the question	10
Probing when a client hesitates	10
<i>Handling “I don’t know”</i>	10
<i>Handling Disclosure</i>	11
<i>Inappropriate Responses</i>	11
Client misunderstands	11
Handling yes/no responses	11
Branching yes/no	11
<i>Terminating an Interview</i>	12

A Few Reminders	12
When the Interview Is Finished	12
Conclusion	13
<b>FREQUENTLY ASKED QUESTIONS FROM CLIENTS</b>	<b>15</b>
<b>NOTES</b>	<b>16</b>
<b>APPENDIX</b>	<b>17</b>

# Foreword

This manual covers the same material covered in the video presentation “Training Case Managers to Administer the Service Adequacy and Satisfaction Instrument” (SASI). Our intent in developing the manual was to provide a tool that may be used while the video is being viewed or as a reference after viewing the video. In cases where case managers are unable to view the video, the manual provides an alternative method for delivering the same information. Although content between the video and the manual is not identical, it is possible to substitute careful reading of the manual for the video presentation and vice versa.

Denise Brothers-McPhail  
Jane K. Straker





# Introduction



Over the past few years, home care providers, PASSPORT agencies, and others have become increasingly aware of the importance of hearing from clients about the services they receive. Clients' perspectives are important because they are the only ones who really know how things are going with the workers and services in their home. After successfully testing the approach of using case managers to collect satisfaction data, case managers will now be able to collect enough satisfaction information to see how clients feel about every service provider. This important step will allow for identification of high

performers in order to learn about their practices. It will let clients know their opinions and insights about the services they receive are of value. And the experience of asking case managers to collect satisfaction information showed that case managers felt they had learned more about how things were really working out for the clients they served.

## **Goal of the Consumer Satisfaction Program**

The goal of this program is to collect reliable consumer satisfaction data from clients of the PASSPORT Program. These data will be summarized in order to give feedback to providers about how well they are doing in serving the needs of PASSPORT clients. It is hoped that this feedback will result in all providers working to improve the quality of their services and ultimately, the satisfaction of all their clients.

## **Purpose of the Training**

The formal training program includes this manual and a training presentation produced by Scripps Gerontology Center. This program teaches research interviewing techniques to case managers and care managers (however your organization refers to you). Throughout this training program, we will use the term case manager to refer to both case managers and care managers.

The purpose of this research interviewer training program is to teach case managers to collect reliable data. This means that any differences in the data are due to differences in the quality of services between providers, not in differences between how case managers collect these data. For example, Case Manager A and Case Manager B follow all the procedures for collecting responses from their respective clients, administering the survey in the same way each time. If both case managers do this, the differences in scores between Provider A and Provider B are due to the difference in how each provider trains and manages their homemakers and personal care attendants. In other words, consistency equals reliability.

Some case managers may already have professional training and experience in research interviewing while others may not. This training program will teach proper techniques to case managers new to research interviewing as well as serve as a refresher course for those with experience. That way, all case managers will conduct the interviews in the same way, assuring uniform and reliable results.

It cannot be stressed enough that training and preparation are essential to the success of the PASSPORT Consumer Satisfaction Program. Combining this training program with your experience as a case manager will help make the program a success!

## **Know the Material**

Before conducting your first client interview you should spend a significant amount of time reviewing the information in this case manager manual, viewing the training presentation and essentially memorizing the survey materials. Do some role-playing of your own. Put yourself in the position of your client. What kind of questions do you think you would have? What will it be like to interview some of the clients you have known? As you do this, you will gain a greater understanding of the program and how to approach the interviewing process.

## **What Does A Successfully Trained Research Interviewer Look Like?**

These are the basic skills and knowledge that case managers should have when the training is complete. A successfully trained case manager should:

- Understand the differences between the roles of case manager and research interviewer
- Understand the purpose and goals of the consumer satisfaction program
- Be able to answer a client's questions about the purpose of the program
- Fill in the survey forms correctly
- Set up the physical environment to ensure success
- Be objective and neutral when administering the survey
- Administer the survey in the same way each time
- Train the client to use the response set
- Maintain confidentiality and handle disclosure in the appropriate manner
- Know how to use probes to help the client respond
- Know how to handle challenging situations, including:
  - Yes-No branching
  - Refusals to participate
  - Wandering clients
- Know when it is appropriate to terminate an interview early
- Honor a client's request to end an interview before completion



# Training Presentation Content

## Background of the Consumer Satisfaction Project

As Scripps worked to test this new procedure and to improve the survey itself, we talked with case managers around the state of Ohio about what it was like to do the survey with their clients. Case managers talked about the following:

- The value of doing the survey.
  - “Client self-determination is at the heart of social work - we want our clients to be able to determine and control the decision making process as much as possible - by allowing our client to participate in the SASI survey - we are giving them the opportunity to have a ‘voice’ with their providers.”
  - “... a client will say on the survey the agency has problems, but tell you how much they like the agency. I actually find this useful as most answers in life are gray not black and white so I can get a better view of what needs to be done for the clients and when there is a problem that needs to be addressed.”
- How the survey helped them to learn more about clients and their services.
  - “Clients appear to be more comfortable answering structured and specific questions pertaining to the service as opposed to being presented with a generalized question about their satisfaction level.”
  - “Sometimes the information is different when they know it is confidential.”
- And about the survey process itself.
  - “I am careful to keep the care manager and researcher role separate...”
  - “I administer the survey at the end of the visit. We have certain requirements for the annual review that we have to fulfill. Then I ask if they would mind answering the questions for the survey...”

In the spring of 2000, the Scripps Gerontology Center at Miami University investigated whether case managers could collect consumer satisfaction data from their clients in a reliable way. By reliable, we mean clients would give the same answers to their case manager as they would to a research interviewer. This was a unique idea, one that many felt couldn't work. Some researchers assumed that clients wouldn't tell a case manager how they really felt about their home care services. Scripps sent its own research interviewers into the homes of clients who had already completed a satisfaction survey with their case manager. Research interviewers asked the same questions and received the same answers as the case managers did.

What was the secret of the case managers' success? These case managers used proven research techniques, as well as their skills as a case manager, to collect reliable data. A satisfaction survey that was easy to administer was also an important ingredient for success.

These training materials will teach you how to conduct a research interview. We will also show videotaped examples to illustrate some of these techniques and how to handle different situations during the interview. If you have trouble with some of the material, you can replay that section of the training, refer to your printed manual, or talk with your trainer.

## Research Terminology

The Consumer Satisfaction Program will use the Service Adequacy & Satisfaction Instrument (SASI). The SASI is based on the HCSM, The Home Care Satisfaction Measure, developed by Scott Geron and colleagues at Boston University. We listened to case managers about what it was like to interview their own clients and to use the HCSM. Based on what we learned, we developed an almost completely new instrument that is easy to complete for both case managers and clients. We also added service issues that both groups felt were important.

- An **instrument or measure** is the set of questions or statements to which the participant responds.
- A **scale** is a subset of questions or statements within the instrument that relates to a specific topic.
  - The SASI has 4 scales: Homemaker, Personal Care, Home-delivered Meals, and Service Adequacy.
- A **response set** is the series of answers from which a client can choose. The SASI has two different response sets. The response set for the first three scales is “Always”, “Usually”, “Sometimes”, “Hardly Ever”, and “Never”. The last three sections have a simple response set of “Yes” or “No”.
- **Probes** are statements that you, the interviewer, can use to help the client choose a response or to focus on the survey if they have gotten off the subject.

## Becoming a Research Interviewer

Case managers and research interviewers are really not that different. Both want to collect information that will help them find out what clients really think. Both case managers and research interviewers want to know the following:

How are things going with the client’s services?

Are the services meeting the client’s needs?

How satisfied is the client?

How can services and service delivery be improved?

However, there are **some differences** between research interviewers and case managers. When it is time for the survey interview portion of your visit, you will no longer be a case manager. You must become a research interviewer. You will need to prepare the client and yourself for this change. You will not be able to discuss the statements or responses with them. This may be difficult for your client to understand because it is different from how you behave as a case manager. This may be difficult for you because as a case manager, your job is to help clients. Reading the introduction section on the front of the survey form will help you to explain these changes to your client. We will talk more about the Introduction later in the training program.

In spite of some very real differences, case managers and research interviewers use some of the **same skills** to do their jobs. Both of these professionals must be patient and will deal with sensitive issues. Both must develop a rapport with the client. Both must gain the client’s trust. And both must know how to listen to and talk with the client.

Your **personal attitude** is one of the keys to your success as a research interviewer. It is where you will succeed or fail. As a case manager, you already know the client well enough to put them at ease and maintain a friendly, interested attitude. But there is more to being a

research interviewer, just as there is more to your job as a case manager. We will talk about each of the following topics in depth: objectivity and neutrality.

You must be **objective**. Don't attempt to influence responses in any way. What the client tells you is all that really counts. Never suggest a response – even if the client asks you what you think. Don't remind them of things they may have said in the past.

You must remain **neutral**. As an interviewer you should merely soak-up information like a sponge. Therefore, you must remain neutral in both your thinking and your actions; do not judge your client's responses or react to their answers in any way. For example, your client may have complained last week about their worker, but now they say everything is fine. This type of situation may cause you to judge whether their answer is true or not. Your job is to record the information, regardless of whether you think it is true or false, good or bad, indifferent, boring or exciting. Don't – by word, facial expression or gesture – indicate surprise, pleasure, or disapproval of any response. Even a slight grimace or nod will cue the client that you have reacted to their answer.

Remember that clients may try to find out what you would like to hear so that they can respond in that way. In research, this is called a “**socially acceptable response**.” Neutrality and objectivity work hand-in-hand to avoid this.

**Confidentiality** is a crucial element to your success as a research interviewer. Your client needs to know that what they tell you in this interview will not be reported to the service provider, entered in their file or talked about outside of the interview unless they choose to talk about it. Use your relationship with the client to establish confidentiality and be sure to honor your client's trust.

**Your presence** will ALWAYS have an effect on the interview. What that effect is depends on you. In a good interview, the client feels comfortable about sharing how they really feel about each and every statement. In a poor interview, the client hesitates to share their true feelings or only tells you what they think you want to hear. Here are some ways to minimize your influence and maximize your chances for a successful interview.

## **Preparing Yourself for the Interview**

You should prepare yourself before the home visit. **Study the instructions and other materials** you will use to conduct the interview. Study all the statements in the SASI until you really know them and can say them the same way every time without stumbling over words or phrases.

### **Who to Interview?**

You will interview clients during a normally scheduled visit if they have been receiving one or more of the three services for at least three months. For example, if the client has been receiving meals for 1 year but homemaker services for 2 months you would only interview the client about their meal service. Do not attempt to interview your client if they are comatose, totally uncommunicative, or asleep.

You should attempt to interview all other clients. Even clients who cannot make complex decisions about their services can provide opinions about the kinds of things asked in the SASI.

### **Completing the Survey Form**

Before the home visit, decide if this is a client you should attempt to interview, and if so, fill out the survey form. It is very important that it is filled in correctly and completely. There are several pieces of information for you to “bubble in” before the home visit. Be sure to completely fill in each bubble so that the scanner can read it. You can use either a pencil or blue or black ink pen. A pencil is recommended so you can easily correct mistakes without having to complete a new form.

- First, bubble in the **month and year** of the interview. Be sure to record the month using two digits. For example, 03 for March.
- Fill in the corresponding bubbles for the:
  - **client number** - Fill in identification number used by your agency.
  - **case manager** - Fill in from left to right as many spaces as will fit. Use whatever unique identifier your agency has assigned to you.
  - **service provider** – Fill in the five-letter code found on the provider code print out. There are three service provider fields; one on the front page for the home worker, one on the second page for personal care worker and one on the third page for home delivered meals.
- Now, bubble in the **program type** (either PASSPORT or an ESP/tax levy program). Next, fill in your **PAA** number in the box provided.
- **“Mark only one” Section. Complete this section AFTER the interview.**
  - **Client Completed** – bubble-in if client completes survey.
  - **Client Refused** – bubble-in if client refuses to participate.
  - **Client Terminated** – bubble-in if client partially completes the survey, but then decides to stop.
  - **CM Terminated** – bubble-in if you terminate the interview because the client is unable to give a valid response to three consecutive statements. A valid response means choosing one of the response categories. Also mark this category if another person insists on being present during the interview and persists in interrupting and interfering with the interview, forcing you to end the interview.

The next section of the form is extremely important. Many clients receive both homemaking and personal care services. Some clients have the same worker for both services while others have different workers for each service. Here is how to handle each situation:

- If the client receives **only homemaker** service, fill in the bubble for homemaker. You will read the first set of statements only.
- If the client receives **only personal care** service, turn to the second page and fill in the bubble for personal care. You will read the second set of statements only.
- If the client has the **same worker** for both homemaker and personal care, fill in the appropriate bubble on the first page. You will read the first set of statements only once.
- If the client **has different workers** for homemaker and personal care, fill in both the homemaker and personal care bubbles. You will need to read the first set of statements for the home worker, then the second set of statements for personal care worker.

If your client is **receiving the same service from two different providers**, complete two survey instruments. This would be the case, for example, if a worker from one provider comes during the week and a worker from another provider comes on the weekend. When completing and administering the survey, make sure you keep straight which form goes with which provider and that the client understands which provider you are currently asking about.

## **Preparing Your Client for the Interview**

Once you have decided to interview the client and have completed the survey form, you will use the following procedures. Before you begin reading statements and recording responses, you will need to set-up the physical environment and introduce the survey to your client.

### ***Setting-up the Physical Environment***

First, set-up the physical environment before you begin. You may have already accomplished this for conducting your home visit.

- Try to be alone with the client if at all possible. If other people are in the client's home or are participating in your home visit, ask to be alone with the client or move to another room. Others may insist on being present. If this is OK with the client, conduct the interview. If the other person repeatedly interrupts or interferes, remind them you are interested in the client's opinion only. If they continue to interfere, simply conclude the interview by ceasing to ask questions and thanking the client for their time.
- Sit face-to-face with your client and within a few feet.
- Minimize distractions by asking to turn off the TV or radio.
- Make sure your client has his or her hearing aid or glasses if necessary.
- Use a lower tone of voice because higher tones are more difficult to hear.
- Speak slowly and clearly. It is easy to read too quickly when you have done it many times.

### ***Introducing the Survey to Your Client***

Next, you should prepare the client for the interview by reading the introductory script on the front of the survey form. It explains the goals and purposes of the interview. The script helps both you and the client make the transition from case manager & client to research interviewer & participant. Be sure to answer any questions the client may have honestly and accurately. There is a Frequently Asked Questions page in this manual to help you. If there is a question that you can't answer, tell them you will get that information for them and make sure that you follow through.

## **Conducting the Interview**

### ***General Tips***

As you conduct the interview, there are some things to keep in mind.

- First, each interview must be done the same way to assure uniform and reliable results. Therefore, always read each statement exactly as it is worded and in the same order every time.
- Next, control your reaction to the client's responses. Record each answer quickly and accurately without reaction, and then continue to the next statement.

### ***Reading the Survey Instructions***

The instructions to be read to the client are printed directly on the survey form. Read them exactly as they are written. If the client receives homemaker and personal care service from different workers, read the separate instructions to begin the personal care section of the survey.

### ***Transitioning from One Service to the Next***

As you move through the sections or scales of the survey, you will need to let your client know that you will now be reading statements about a different kind of service. There are instructions for you to read on the form that will help with the transition.

### ***Home Delivered Meals Service***

After the homemaker and personal care scales is the home-delivered meal scale. Here you should check that you have bubbled in the provider identifier and indicate what types of meals the client receives. Don't include the emergency shelf meals, just those types your client receives on a daily, weekly, or bi-weekly basis. If, for example, your client receives a ready-to-eat meal on the weekdays and frozen meals for the weekend, you would fill in bubbles for both "Ready-to-Eat" and "Frozen."

### ***Comment Section for Home Care and Delivered Meals***

After the meals scale is a section for Home Care Comments and Home Delivered Meals Comments. This is where you will write down any client statements that reflect either exceptionally good or poor service. Also use this section to describe why you skipped a part of the survey (for example, if you skip the home worker section because the home worker was in the room). You can also use this section to indicate if you used a translator. When using this comment section, remember not to use any names that identify the client or the worker.

### ***Service Adequacy Section***

After the comment section, there are statements about the adequacy of the three PASSPORT services. You will notice several differences.

- First, the response set for all statements is now Yes or No. To help the client make the transition from a response set of five to two, flip the response card over to the yes/no response set.
- There are several places for you to insert the name of the provider within the statement. For example, "Have you ever called ABC Nursing about a worker problem?"
- There is also a skip pattern. For example, if a client has never called the provider about a worker or meals problem, you will skip the next statement.

### ***An Example of a Basic Interview***

Watch the example of a basic interview included in the training presentation. Pay close attention to the procedures that the case manager uses. In this interview, the case manager will be using the Homemaker scale. Feel free to make notes or write questions so you can discuss the interview with your trainer later. A page for note-taking is provided at the end of this manual.

Now take some time to think about the interview. What went well? How could it be improved?



### ***Skills***

In thinking about the interview, did you make the following observations? The case manager exhibited patience while his client answered questions and he appeared to have rapport with her client. He also was a good listener and communicated well with the client.

### ***Neutrality***

Did the case manager react to his client's answers? In order to remain neutral, it is important to not react in any way after a client gives a response. Note that the case manager nodded and smiled after quite a few of the responses. Reacting to a client's answers could lead to socially acceptable responses. Remember, record the answer, don't react, and move on to the next statement.

Also, the case manager may have been a little quick to accept some of his client's answers. For example, when his client answered "sometimes they tell me and sometimes they don't" to the statement "I am told when there is a change in my worker's schedule", the case manager accepted the answer without confirming. Confirm your client's answer by repeating all five response choices.

### ***Interview Preparation***

How well did the case manager do in preparing for the interview? He was comfortable with the script and read it accurately and completely to the client. He was alone with his client, sitting a few feet away, they were facing each other, there didn't appear to be any distractions in the room, the client had her glasses on, and the case manager spoke clearly and slow enough to be understood.

However, instead of bubbling in the information beforehand, he completed this information after the client consented to participate but before he started reading the statements. Bubble-in the information ahead of time (before arriving at the home) so there is no break between when the client gives consent and when you begin the survey.

### ***Training the Client to Use the Response Set***

How did the case manager do with training the client to use the response set? He began by reading the instructions and as he read the response set, he handed the response card to his client to hold. Next, the case manager read the entire response set after the first three statements. Repeating the response set teaches the client that they must make a choice from the response set. One way to know if the client has mastered the response choices is when he or she begins to choose an answer before you have read all the choices. The response card reminds the client of the acceptable responses and usually eliminates the need to read the response set after every statement.

### ***Acceptable Ways for the Client to Respond***

Although the client was able to tell the case manager her response, there are several acceptable ways for your client to indicate their response. Your client may tell you their response, they may tell you the number of their response, or they may simply point to their answer on the response card.

### ***Repeating the Response Choices***

Sometimes it is necessary to repeat the response choices. This was necessary a couple of times in our example. If you need to repeat the response choices, ALWAYS read all 5 responses.

### **Handling Challenging Clients & Situations**

Some clients may present a challenge for you as an interviewer. Here is how to handle some typical situations.

#### ***Keeping Clients on Track***

You may occasionally have a client who begins to talk about things unrelated to the survey. Gently re-focus them by repeating the question and perhaps the response set. Try not to get drawn into a conversation about another topic. You might say, "We can talk about that after we finish the survey," or "I'll be glad to hear about that later. Right now, let's finish the survey."

#### ***Probes***

There are several situations where it may be necessary to prompt your client, to respond to comments made by your client or to answer a question about a specific statement. However, you are very limited in how you can respond. There are several probes that you are allowed to use. Using these standardized probes will help each case manager to collect complete and accurate data in the same way. Probes also help to reinforce that you are not asking about services as a case manager but as a research interviewer. Here are the acceptable probes and the situations in which they might be most helpful.

#### **Probing when a client asks the meaning of a question**

Occasionally, a client may ask you what a statement means. You cannot interpret a statement for them. Instead, say, "Let me read it for you again." If the client asks, or seems confused, use one or both of the following probes:

- **"Whatever it means to you." OR**
- **"Take a minute to think about it."**

#### **Probing when a client gives an example to answer the question**

A client may give you an example related to the statement instead of choosing their answer from the response set. Here are the probes to use when this happens:

- **"Keeping that in mind, which answer choice is closest to what you think?" OR**
- **"Choose an answer from the choices that is closest to how you feel."**

#### **Probing when a client hesitates**

If a client is hesitant to answer, has difficulty choosing between two responses, or asks what you think she should say, you may say "Let me read it for you again". If that does not elicit an answer, try one or both of the following probes:

- **"There are no right or wrong answers." OR**
- **"We are interested in your honest opinion."**

#### ***Handling "I don't know"***

Sometimes your clients will say, "I don't know" or "I haven't thought about that" as a way to take some time in choosing an answer. If a client answers "I don't know," give them a minute to collect their thoughts. Try reading the response choices again. Next, read the statement again slowly. It is possible they didn't understand it the first time and can now provide an

answer. You may also encourage them with the probes, “There are no right or wrong answers” or “We are interested in your honest opinion.” This may help them feel more comfortable about choosing an answer. If they are still unable to choose a response, they may not have enough information to make a judgment. Your client may say something like, “She hasn’t been here long enough for me to know about that.” If you believe their answer is truly “I don’t know,” then leave that statement blank and move to the next statement.

- **Give them a minute to think about it.**
- **Read the response choices again.**
- **Read the statement again.**
- **Try using a probe.**
- **Leave it blank and move on.**

### ***Handling Disclosure***

It is possible that during the survey, a client may tell you something that causes you concern as a case manager. This is called disclosure. You should continue with the interview, remaining neutral and objective. After the interview is finished, remind them that what they said in the interview will remain confidential. Tell them that if they would like to discuss any problems or concerns about their services, that is why you are there.

- **Finish the interview.**
- **Remain neutral and objective.**
- **When finished, ask if your client wants to discuss anything.**

### ***Inappropriate Responses***

#### **Client misunderstands**

Sometimes it is obvious that a client misunderstands a statement. Try repeating it or use one of the recommended probes, such as “Take a minute to think about it.” If the client still seems to be confused by the statement, ask if they would like to go on to the next one. You may go back to the confusing statement at the end of that section of the interview. However, you should never change any previously recorded responses, even if the client wants to change his or her response later.

- **Repeat the statement.**
- **Suggest that the client take some time.**
- **Ask if the client would like to skip that statement and come back to it later.**

#### **Handling yes/no responses**

Sometimes a client may get into the habit of answering “Yes” or “No” after each statement. There are two ways of handling this problem. First try re-reading the response set and asking them to choose one of those responses.

- **Re-read the entire response set.**

#### **Branching yes/no**

If the client continues to respond this way, you will need to “branch” the response categories for them. When the client says, “Yes”, ask “Do you mean ‘Yes, always?’, ‘Yes, usually?’ or ‘Yes, sometimes?’” If the response is “No”, ask “Do you mean ‘No, sometimes’,

‘No, hardly ever?’ or ‘No, never?’” This is the only time you do not need to repeat all 5 responses.

**YES**

**“Yes, always?”**

**“Yes, usually?”**

**“Yes, sometimes?”**

**NO**

**“No, sometimes?”**

**“No, hardly ever?”**

**“No, never?”**

### ***Terminating an Interview***

Occasionally a client may ask to end the interview before it is completed. If there are only 2 or 3 more statements, let the client know this. They may choose to finish the interview. If the client still wants to stop, honor that request and terminate the interview. Be sure to mark the “Client Terminated” bubble on the front page of the survey form.

- **If the interview is almost over, let your client know this.**
- **Honor your client’s request to end the interview.**
- **Mark the “Client Terminated” bubble.**

Another situation where the interview must be terminated is when a client is too confused or tired to complete the interview. They may answer “I just don’t know” or “I haven’t thought about that”. If re-reading the statements, asking them to think about it, and telling them there are no right or wrong answers doesn’t result in valid responses, then you should consider terminating the interview. Use the following standard: If your client can’t give a valid response to 3 consecutive statements, you should end the interview. A valid response means choosing one of the response categories. Remember to mark the “Case Manager Terminated” bubble on the front page of the survey form.

- **Reread the statements.**
- **Ask them to “take a minute to think about it”.**
- **Remind them there are no right or wrong answers.**
- **Mark the “Case Manager terminated” bubble.**

### **A Few Reminders**

Here are a few reminders and tips to help you succeed.

- **Read every statement, even if they don’t seem to apply to that client.**
- **Be patient while waiting for a response.**
- **Don’t accept a “Don’t Know” response too quickly.**
- **Be sure to mark the client’s responses correctly.**
- **If the client refuses to choose or clarify a response, leave it blank.**

### **When the Interview Is Finished**

After you have finished reading all the statements and recording the responses, check over the form for completeness before you conclude the interview. Also, make sure you have filled in all the required information.

Let the client know that the interview is “officially” over. Put away all interview materials. Now is the time to ask the client if there is anything they want to discuss about their services. Do not remind them of specific comments made during the interview – this is a breach of confidentiality. But do let them know that you are interested in whatever they have to say and that, as their case manager, your job is to help them receive good quality services.



## **Conclusion**

Now that you have seen how to conduct an interview and how to handle various situations, your trainer will give you the chance to practice what you have learned. As you practice, try to anticipate how some of your clients will react to certain statements or to the interview process as a whole. Figure out the best way to handle that situation. Discuss the problems and solutions with your trainer and other case managers. Remember that the more you practice and anticipate, the more confident you will be about your skills and the more successful you will be as an interviewer.

Finally, remember why you are doing this. The purpose of the consumer satisfaction program is to guide providers in improving the quality of services offered through the PASSPORT program. You will assist in identifying providers of both high and low quality services. This information will be used to assist all providers in improving the quality of their services, and to enable clients to receive high quality services that meet their individual needs and preferences. As you help your clients articulate feelings about their satisfaction with PASSPORT services, you will help consumers both now and in the future receive the quality of services they deserve.





## Frequently Asked Questions from Clients

***What is this survey for?*** This survey is being conducted by the agency that administers your PASSPORT program. They want to find out how satisfied people are with the services they are receiving through the PASSPORT program, so they are asking all PASSPORT clients these questions. The information will be used to help the home care and meals providers improve these services for all their clients.

***What if I don't want to participate?*** You do not have to participate if you choose not to. We would like as many PASSPORT clients to participate as possible, but it is your choice. Your services will not be affected if you do not participate.

***How will this affect my services?*** Your services will not be affected in any way, whether you participate or not. The information from these surveys will be used to improve home care services for everyone.

***Who will know my answers?*** Your case manager will know what your answers are, but he/she will keep your responses completely confidential. The survey form does not have your name or address on it. Your ID# is on the form so we can make sure we give everyone a chance to take the survey each year. All surveys will be fed into the computer and everyone's answers will be added together to get an overall picture of how our service providers are doing.

***What if I want to stop?*** You can stop any time during the survey for any reason. Just tell your case manager.

***Do I have to answer all the questions?*** No. Just as you can choose to participate in the survey and can stop the survey at any time, you can choose to answer or not answer any individual question. Just tell your case manager that you want to skip that question.

***Who is interviewed?*** All PASSPORT clients receiving Homemaker, Personal Care **and/or** Home Delivered Meals for at least **3 months**. Only clients are interviewed. No proxies are allowed for this survey.



## Notes



# Appendix



<b>1</b> <b>Yes</b>	<b>2</b> <b>No</b>
------------------------	-----------------------



<b>1</b> <b>Always</b>	<b>2</b> <b>Usually</b>	<b>3</b> <b>Sometimes</b>	<b>4</b> <b>Hardly</b> <b>Ever</b>	<b>5</b> <b>Never</b>
---------------------------	----------------------------	------------------------------	--	--------------------------