

Using Field Representatives' Case Notes to Explore Respondents' Interaction With Health Insurance Questions

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MOTIVATION AND BACKGROUND

- Computer-assisted personal interview (CAPI) instruments allow field representatives (FRs) to write their observations (case notes).
- FRs' rapport with participants can provide insightful information.
- Qualitative analysis of case notes can inform question design.

CASE NOTES

FRs enter case notes, including:

- Words or concepts respondents did not understand.
- Additional information about answers provided.

PURPOSE

- Explore FRs' health insurance household-level case notes to determine possible issues with the questions.

DATA AND METHODS

Data Source: The Survey of Income and Program Participation (SIPP).

- Nationally representative, longitudinal survey.
- Information on the dynamics of income, health insurance coverage, and household composition, among others.

Data: Approximately 2,500 health insurance household-level case notes from 2021 and 2022 SIPP.

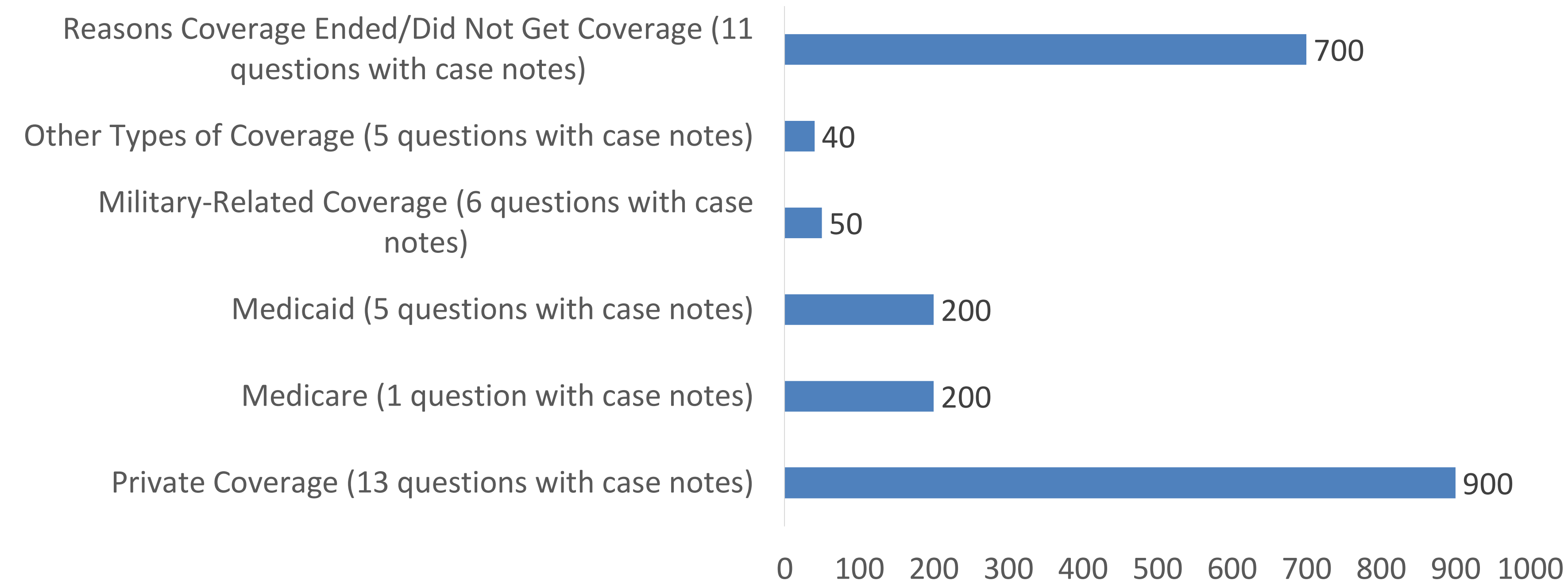
Health Insurance Topics:

- Types of Coverage: Private coverage; Medicare; Medicaid; Military-related coverage; Other types of coverage.
- Additional questions: Reasons coverage ended; Reasons did not get coverage.

Methodology: Inductive coding.

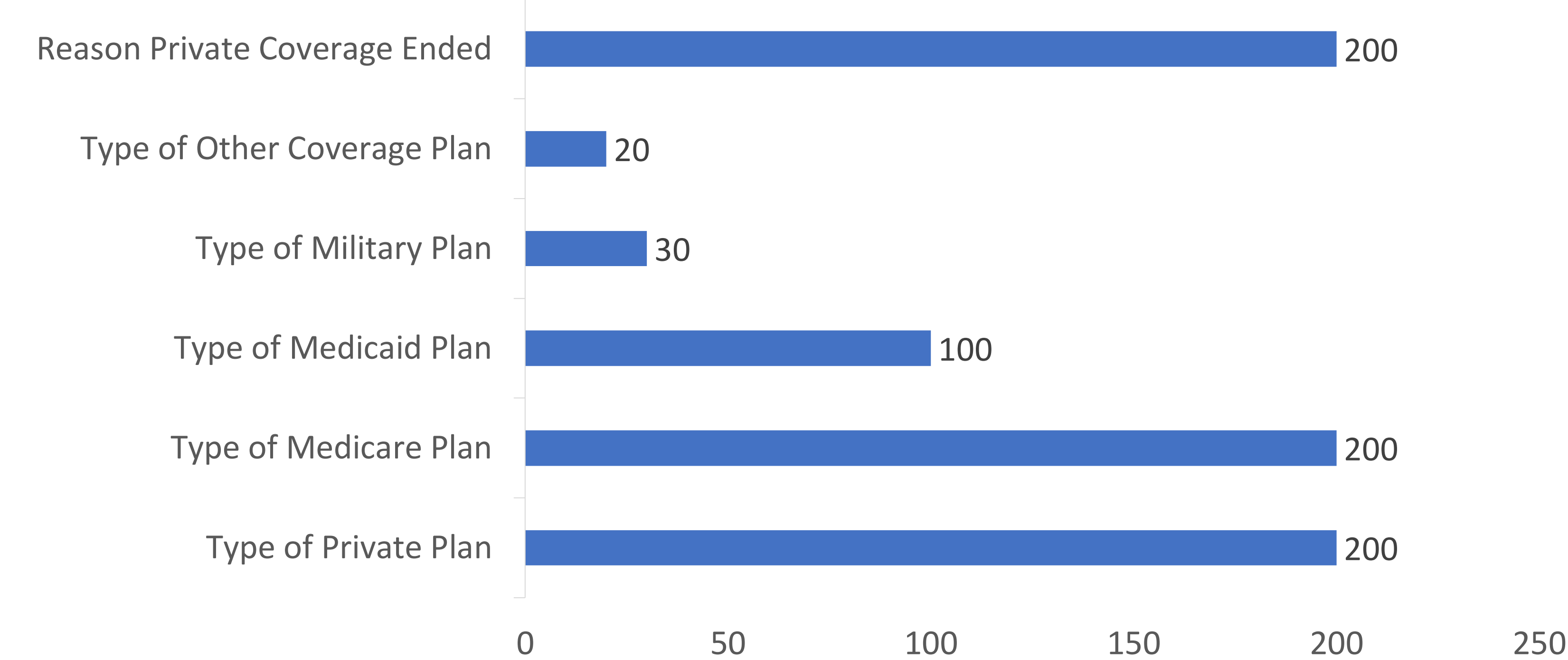
RESULTS

Figure 1. Total Number of Case Notes by Health Insurance Topic



Source: U.S. Census Bureau, 2021 and 2022 Survey of Income and Program Participation, field representatives' case notes.

Figure 2. Total Number of Case Notes by Health Insurance Question



Source: U.S. Census Bureau, 2021 and 2022 Survey of Income and Program Participation, field representatives' case notes.

Table 1. Sample of Health Insurance Questions with Most Case Notes

Question	Wording	Response Options
Type of private plan	Is this plan... <i>Read answer categories.</i>	1 = An HMO (Health Maintenance Organization) or IPA (Individual Practice Association)? 2 = A PPO (Preferred Provider Organization)? 3 = A POS (Point-of-Service) 4 = A fee-for-service or indemnity? 5 = Some other kind of plan?
Reason private coverage ended	What was the reason this insurance plan coverage ended? <i>Mark all that apply.</i>	1 = Expensive 2 = Job loss 3 = No longer eligible 4 = Unhappy with plan 5 = Waiting 6 = Other

Source: U.S. Census Bureau, 2021 and 2022 Survey of Income and Program Participation.

Table 2. Most Common Code by Health Insurance Topic

Topic	Most Common Code Assigned to Case Note
Type of private plan	Not sure/Do not know which type they have: 80 cases
Type of Medicare plan	Not sure about which part(s) they have (Part A, Part B, etc.): 70 cases
Type of Medicaid plan	Do not know what type they have (HMO, fee-for-service, etc.): 20 cases
Type of military plan	VA coverage: N<15 cases
Type of other coverage plan	Vision and dental: N<15 cases
Reasons private coverage ended	Changed job: 60 cases

Source: U.S. Census Bureau, 2021 and 2022 Survey of Income and Program Participation, field representatives' case notes.

SUMMARY

Out of the total health insurance case notes:

- Private coverage had the most case notes.
- 'Type of plan' question had the most case notes across all questions.
- Most common code was "not sure/don't know".

LIMITATIONS

- Household-level case notes.
- Proxy reporting.
- Field case notes in SIPP are underutilized.
- Not all questions are on path.
- Not representative of the entire population.

RECOMMENDATIONS

- Expert review of the questions.
- Exploratory interviews.
- Cognitive testing.
- FR training.

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