

# Using a Qualitative Approach to Collecting Quantitative Data: Challenges in Unique Survey Programming and Interviewer Training

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# Presentation Overview

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- Study Overview
- Instrument Development
- Interviewer Training

# Study Overview

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# Access to Treatment for Lung Cancer Study Overview

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## Study Objective:

To document and understand delays in lung cancer care.

## UWSC Role:

Collect data from patients to understand the magnitude of delays in the lung cancer diagnosis-to-treatment continuum and where they are most likely to occur.

## Participants:

Wisconsin residents and North Carolina residents diagnosed with lung cancer within a year of the phone interview.

N=380, 225 WI, 155 NC

# Overview of ATLC Study

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- ATLC Interview not usual question-answer sequence
- Qualitative approach, open ended question asking respondents to “share their story”
- Interviewers take notes and code data derived from the respondent’s story
  - ❖ Quantitative data being gathered:
    - ✓ Dates
    - ✓ Accuracy of Date Recall
    - ✓ Tests
    - ✓ Medical Specialties
    - ✓ Treatment

# Overview of ATLC Study

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- Client will do qualitative analysis of some interviews using audio recordings
- Interviewers asked to help identify outlier cases:
  - Severity of delays
  - Unusual circumstances

# Challenges

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- Developing an instrument that provides structure and allows flexibility.
- Training interviewers to conduct this type of interview.

# Instrument Development

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# Instrument Development

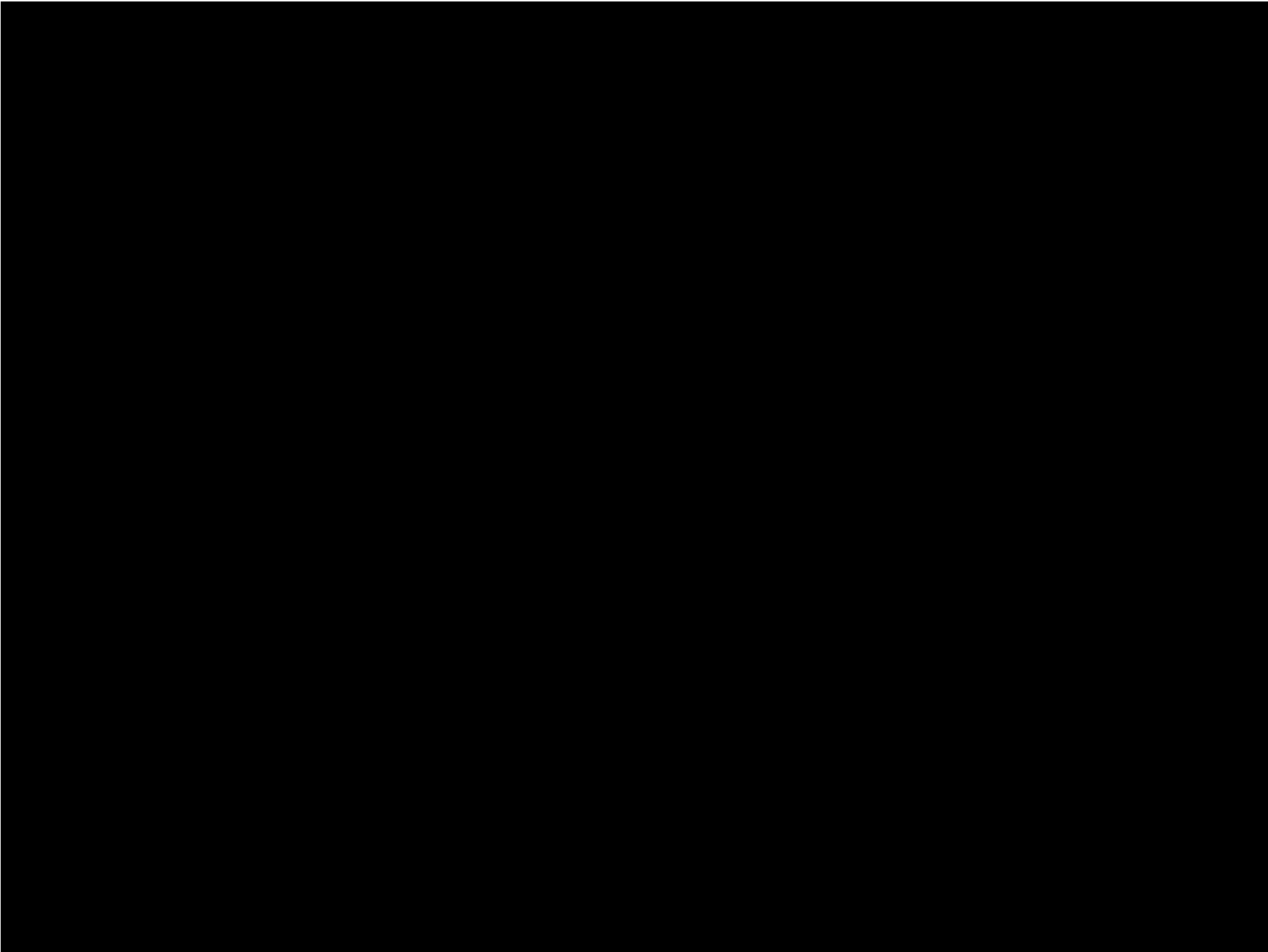
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- Early meetings with client and programmer.
- Desire to allow interviewers the flexibility to take notes and code variables in a non linear fashion.
- Programmed in CASES 5.5
  - Able to treat it like any other phone study using the same front end as other studies.
  - Allows to constrain ranges and help with validity checks.
  - Visual feedback as to what has been coded and what needs to be coded.

# Instrument Development

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- 3 main screens (initial visit, diagnosis, treatment) allow you to scroll up and down the page and move from one screen to another without having coded all variables in a particular screen.
- Demographic questions at the end follow standard format and have to be coded in order to move to the next question.



# Interviewer Training

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# Interviewer Training Challenges

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- How to implement an interview with such loose structure
- Developing a training that emphasized the importance of standardization in spite of the apparent deviation from center standards

# Interviewer Training

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- 4 hour interviewer training included:
  - Presentation by client on Lung Cancer continuum of care.
  - Importance of active listening, taking notes and proper coding.
  - How to accurately apply verification technique in a standardized manner.
  - Use of responsive probing.
  - Group practice listening to couple of interviews and coding on paper followed by discussion.
  - Additional time for interviewers to practice on their own using the programmed instrument.

# Interviewer Rules

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1. Read **every** question **exactly** as written
2. Read the **entire** question
3. Use tuning and neutral probes properly
4. Use verification properly
5. Do not interpret the question for the respondent
6. Record answers accurately
7. Do not communicate judgments about the substance of answers
8. Give neutral feedback about the process
9. Do not volunteer personal information or opinions
10. Communicate clearly and effectively
11. Leave notes when necessary

# Interviewer Rules and ATLC

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- Unusual structure of the interview appears to contradict some Interviewer Rules.
- Interviewers need to conduct the interview in a standardized manner and should keep rules in mind at all time.
- Some rules adapted to allow interviewers the flexibility needed to collect the most accurate data, without leading or biasing the respondent.



# Rule 1: Read Every Question Exactly as Written

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- ...Not for ATLC!
- All respondents must hear the introduction and opening question:

I would like you to tell me the story of your journey through the diagnosis and treatment of lung cancer, and its timeliness. I want to know everything from how it all started, up to the point of your first treatment.

I am particularly interested in the dates of your medical visits and tests. I will listen to your story, asking some clarifying questions as we go along. I will then verify the information collected as I listened to you, and ask additional questions in order to identify any dates missing. You can use any resources you may have that can help you remember the dates, including the assistance of a family member/caregiver, or the aid of a calendar, medical bills, a disease folder, or appointment summaries.

Lets start from the very beginning. When did you first see a doctor because you had noticed something different in how you felt that later turned out to be lung cancer?

# Rule 1: Read Every Question Exactly as Written

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- Instrument includes a question for each variable that needs to be coded.
- These are only read when the respondents' story does not address the question.
- How detailed the respondents are in their open ended statement will determine which questions will need to be asked.
- Interviewer takes notes and uses the calendar in order to integrate tuning and verification using information learned from the open ended statement.

## Rule 3: Use of Tuning/Zeroing-in and Neutral Probing

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Examples of neutral probes to get the story moving along:

- And what happened after that?
- Let's talk more about what happened between your visit to your family physician and the time when you had a biopsy. What other appointments and tests did you have?
- Could you be a little more specific?
- Can you tell me more about that?
- Is there anything else?

# Neutral Probing

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- Interviewers are encouraged to take notes and use what has been learned from the respondent to target responsive probes to secure desired data.
- If information not provided, read the question

# Tuning or Zeroing-in and estimating dates

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- Tuning or zeroing-in is particularly relevant in helping respondent recall a specific date in ATLC.
- Interviewers use the “Access TLC Rules for Date Recall” when estimating a date.

If R only remembers...	IVR will record...
the month	the 15 <sup>th</sup>
fell near the <u>beginning</u> of the month	the 7 <sup>th</sup>
near the <u>end</u> of the month	the 22 <sup>nd</sup>
the specific week	Wednesday of that week
If R....	IVR will...
narrows down to 2 dates	record earlier of the 2 dates
Cannot remember at all	Leave date blank and code it 3

## Interviewing Rule 4: Use Verification Properly

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- “Verification” is a technique used when a respondent has already provided information that answers the question interviewer is about to ask.
- Interviewers rely heavily on verification skills for ATLC.
- The respondent may have provided this information during the initial open ended statement or while answering previous questions.

# Verification Format

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- Instead of reading the question exactly as written, interviewer restates the information provided without reading the question.
- Asks for confirmation by saying, "...is this correct?"
- *EXAMPLE:*
  - *"So, earlier you told me you had surgery on August 9<sup>th</sup>. Is that correct?"*

## Verification: In Summary

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- If unsure whether the respondent previously answered the question, interviewer reads the question.
- Interviewers use verification when going back to the beginning and verifying data already gathered.
- Always give the respondent the chance to correct misunderstandings (i.e. "...is that correct?").



# Lessons Learned

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- Important to involve all relevant staff in the survey center at an early stage
- Critical to guide instrument development by study needs to incorporate structure with flexibility
- Possible to train interviewers in a manner that partly departs from standard interviewing techniques without completely losing standardization

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Thank You!

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