# 3 Using CAHPS Reports for Consumers and Other Audiences

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# 3 Using CAHPS Reports for Consumers and Other Audiences

## Introduction

The design phase described in Chapter 2 allowed you to think globally about your CAHPS project, its major components, and how a CAHPS project could fit into a broader effort to educate consumers and others about health care and health plans. This chapter focuses more specifically on the issues involved in reporting CAHPS results by discussing the following:

- CAHPS reporting materials;
- Major principles underlying materials' design and content;
- How sponsors should incorporate CAHPS reporting materials into their existing and planned efforts to educate and inform consumers about the health plan choice process;
- Alternative ways that CAHPS results can be reported to a variety of audiences and for a variety of purposes; and
- Guidance on determining the content of CAHPS reports.

## The CAHPS Reporting Materials for Consumers

Because CAHPS projects differ in terms of who is surveyed, how questionnaire results are analyzed, and the content and audience for reports, it is impossible to supply a one-size-fits-all reporting format that can be used by any CAHPS sponsor. As a result, the CAHPS development team decided to create and test two ways of reporting the survey results: a print guide, ***Compare Your Health Plan Choices***, and an interactive computer system, ***Decision Helper***. The ultimate goal of these guides is to assist consumers in understanding and using comparative quality information from the CAHPS survey to make a well-informed decision regarding their health plan selection.

In addition to the guides, the ***CAHPS 2.0 Survey and Reporting Kit*** contains a video, three posters, and a flyer that sponsors can use to publicize the availability of the guides and to motivate audiences to use them. All of these complementary CAHPS reporting products, with the exception of the video, are included in the Kit in the form of templates that must be adapted and customized to meet the needs of your particular project. ***Instructions for Customizing the CAHPS Print Guide***, ***CAHPS Computerized Guide***, and ***CAHPS Posters and Flyers*** appendixes are on ***CD-ROM 2***. They contain samples of the reporting products, the software templates, and instructions on how to customize them.

***What Is a Template?***

We use the term *template* to refer to the CAHPS patterns or guides we have designed for you to use in creating your own CAHPS 2.0 consumer reporting products.

## The Print Guide

The print guide, ***Compare Your Health Plan Choices***, presents the CAHPS survey results in an easy-to-understand, easy-to-navigate fashion. Together with other information that sponsors need to supply about costs, benefits, coverage, and participating providers, consumers can use the print guide to decide which plan is best for them and their families. The print guide includes the following information:

- Descriptive information about the major health plan types, the importance of incorporating quality in health plan choices, background on the CAHPS survey, and contact information for the plans included in the survey and for other sources of information; and
- Survey results reported in two ways—comparison star charts, which reflect comparative plan performance, and bar graphs, which show the distribution of responses to composites of survey questions.

## The Computerized Guide

The computerized guide, ***Decision Helper—A Guide to Health Plan Quality from the Consumer's Point of View***, includes essentially the same information as the print guide but is designed and formatted to take advantage of a computer's capabilities. A consistent set of navigational images and icons helps make the ***Decision Helper*** easy to use for novices as well as experienced computer users. The guide has four main parts:

- **Welcome,** a motivational section that contains information to help users understand the purpose and content of the guide.
- **Types of Plans,** which provides information about HMOs and PPOs and how they compare.
- **Survey Results,** which presents the survey results in a hierarchical fashion, using the star charts and bar graphs. When viewing summary charts (star charts), users can select individual topics that present more detailed and specific information (bar charts).
- **Your Worksheet,** which contains general advice about comparing health plans, as well as a summary table that helps consumers organize and integrate the information presented in the earlier sections of the Decision Helper. This section also gives advice about how to find more information regarding benefits, costs, and doctors and discusses important issues to consider when choosing a health plan.

## The Video

This 13-minute CAHPS video, ***Understanding Your Health Plan Choices,*** is designed to provide consumers with basic information about CAHPS. It helps viewers understand the importance of quality as a factor in decisionmaking and is intended to motivate them to use CAHPS results in their health plan choice process.

### The Posters and Flyer

The CAHPS posters tell consumers that new information is available about the health plans they can join. The design and content are intended to encourage consumers to use this information when choosing a health plan, and sponsors should post them as a visible and integral element of their CAHPS project.

Similarly, the trifold CAHPS flyer has been developed for use by sponsors to tell consumers that there is new information they can use to pick a health plan. It describes this information, tells readers why it is important, and explains where they can find the CAHPS guides. Sponsors can distribute the flyer as a self-mailer or in pay envelopes.

### Other Information Related to the Health Plan Choice

Traditionally, consumers have relied on lists of participating providers, schedules of costs and benefits, and general information about health plans when selecting a health plan. The addition of the CAHPS reporting materials can be used to complement these materials.

## General Principles that Support the CAHPS Reporting Materials

The print and computerized guides and other CAHPS reporting materials are the result of extensive research and testing. CAHPS development team members wanted to create reporting materials that were both easy to understand and useful. In this process, they articulated several principles that underlie all the individual reporting materials and tie them together:

- The materials are designed to maximize the effectiveness of CAHPS data in helping consumers make health plan choices that include quality considerations. Because the materials are explicitly designed to present the same kind of information in the same way about every plan in the report, they allow consumers to compare plans and make well-informed choices.

- Key messages, which are designed to support a longer-term educational and motivational agenda, are repeated in each of the reporting materials. These key messages draw attention to the release of survey results and help consumers understand their importance. The repetition also reinforces the information and helps to give all of the CAHPS reporting products a unified look. These key messages include the following:

    - "Your health plan choice is important to the quality of the health care you receive;"

- "Not all health plans are alike;"
- "This information about experiences with health plans comes from people like you;"
- "The information from the CAHPS survey has been collected by an independent source, not the health plans;"

- All of the materials are intentionally complementary in tone and content so that they can be used in combination. They can also be used singly, as appropriate, to fit a sponsor's needs; and

- The materials are sufficiently flexible to be adapted by sponsors to suit a variety of audiences, resources, and circumstances.

Finally, the materials are designed to respond to the very real confusion, misinformation, and lack of information that many consumers have about the health care system in general and their health plans in particular. In doing this, they serve several different functions that operate across a continuum:

- **Announce.** The materials provide basic information, such as when open enrollment information will become available to employees and how it will be distributed and/or the date, time, and location of a meeting to discuss the health plan choice process.

- **Motivate.** The materials help consumers and other audiences understand why health plan quality and comparison information is important to them and encourages them to seek out information about the subject and incorporate it into their decisionmaking process.

- **Educate.** The materials structure and present information in a broad way to facilitate learning. Information about consumers' role in the health care marketplace or about the differences between HMOs and PPOs are examples of information in this functional category.

- **Inform.** The materials present specific factual information that consumers can use. Actual survey results and explanatory information or information about specific facets of plans, such as co-payments, are examples of information in this functional category.

- **Support decisionmaking.** The materials also structure and present textual information in such a way as to help users understand and sort through options. Information that supports decisionmaking builds on the foundation of educating and informing materials to help users reach a decision that meets their specific needs. The worksheets in the interactive **Your Worksheet** section of the computerized guide are an example of decisionmaking support.

CAHPS materials are designed to work in a complementary fashion across all of these functions, as shown in Table 3-1:

***Table 3-1. Complementary functions of CAHPS materials***

| | Announce | Motivate | Educate | Inform | Support decisionmaking |
|---|---|---|---|---|---|
| **Video** | | ✔ | ✔ | | |
| **Posters** | ✔ | ✔ | | | |
| **Flyer** | ✔ | ✔ | | | |
| **Print Guide** | | | ✔ | ✔ | ✔ |
| **Computerized guide** | | | ✔ | ✔ | ✔ |

## Integrating CAHPS Reporting Materials into the Health Care Information/Plan Choice Process

Because the health plan choice process typically takes place over a period of weeks or months, a project team will need to decide how to use and distribute the CAHPS reporting materials to help consumers during this time. These decisions will be based on your own unique health plan choice environment, for example, whether employees have active or passive enrollment, the open enrollment schedule, and whether there is an existing communications effort around health care quality and choice issues.

***Active and Passive Enrollment***

*Active enrollment* means that consumers must take action themselves every year to re-enroll in their plan or to enroll in a new plan. *Passive enrollment* means that unless consumers take specific action to change their enrollment, they are automatically retained in their existing plan from year to year. In a passive enrollment environment sponsors are especially challenged in getting consumers to read material since they don't have to take any action to merely stay in the plan they're already in.

The following are some of the specific issues involved in the process:

**Audience.** You must identify which members of each target audience will receive each type of report. In some cases, this is simple: If a project is conducted by a consortium of employers, each employer can distribute the report to all of its employees. In other cases, this decision is more complex. For example, a statewide Medicaid agency may be planning a survey of all the plans in the state. It will need to decide whether to send one report to all recipients in the state or to develop several reports for recipients in particular regions; because not all plans are available in every region, these reports might contain results only for those plans in the relevant regions.

**Purpose.** You will also need to be clear about the purpose for which you will use and distribute the materials. As shown in Table 3-1, CAHPS reporting materials have different functions, and you may want to focus on one or another function at different times during the process. For example, if you are in the first year of a CAHPS or other health care quality communication program, you may want to focus only on educating your consumers and providing a small amount of survey results. This approach does not overwhelm or confuse your audience, while at the same time educating them and building demand for more information.

**Distribution timing.** It is important that the reports be available to consumers when they are actively involved in making a decision. For consumers, this would be the start of open enrollment periods and at other times when they are called upon to choose a plan (e.g., a change of circumstance, such as having a baby or starting a new job, or when Medicaid recipients become eligible to choose or change a plan). Benefits managers and others, such as Medicaid agency staff, may have different needs concerning the time of the distribution of results.

Remember that various CAHPS reporting materials have different functions, so your "when" thinking should be closely related to your "why" decisions. You will need to think about the most appropriate sequence in which to distribute the materials and how that fits into the timing of your audiences' decisionmaking process. For example, it will be important to focus on announcement and motivational materials first (the video, posters, and flyer), then move on to the educational, informational, and decision support materials (the print and computerized guide), ensuring that audiences receive these materials before and during open enrollment so that they are appropriately prepared to make a good decision. If you are developing other materials as part of a broader, long-term educational effort, you will need to make sure that they complement your distribution of CAHPS materials.

**Distribution methods.** You are making a significant investment of time, staff, and resources in your CAHPS project, and previous CAHPS experience and research shows that the amount of money and effort you put into distributing your results is directly related to how many people will see and use them. As a result, we encourage you to actively distribute the CAHPS materials to ensure that as many people as possible are exposed to them. Some obvious options for distributing the print guide and the flyer include mailing them separately to each person's home address, mailing them as an enclosure in an annual open enrollment packet, using corporate intranet systems (a computer communications network that operates within a given organization), or distributing them as E-mail attachments. These options could be used separately or in combination.

If you include the guide as part of the regular enrollment packet, individuals who are not considering changing plans will probably never see the booklet because they will not even open the packet. Therefore, to ensure the widest possible exposure to the guide, we encourage you to send it separately, even though your postage costs may be higher. One advantage of sending the guide directly to members' homes is that spouses, who are often directly involved in the health plan decisionmaking process, also will be exposed to the information.

Another distribution strategy for the print guide is to send it to different areas of your organization and rely on those within each unit to distribute the booklets to individuals within the unit. Although this approach is more economical than mailing it directly, it relies on others to complete the distribution and is less likely to be effective. If you take this approach, it is important to publicize the availability of the guide. The video, posters, and flyer should be an important part of your publicity campaign.

Options for distributing the computerized guide include using the Internet, intranet, or stand-alone computers or computer kiosks. Again, the video, posters, and flyer should be an important vehicle for publicizing the availability of the computerized guide.

***Getting Technical Assistance from SUN***

There are many possible distribution strategies, and one size does not fit all. We encourage sponsors to call ***SUN Help Line*** at **(800) 492-9261** to learn about the ways in which other sponsors have distributed reports or made information available.

## The Role of Information Intermediaries in Reporting CAHPS Results

Research studies and experience with many types of consumers in many situations have shown that people often do not make decisions by themselves. They frequently depend on others—so-called "information intermediaries"—for help. Benefits managers, beneficiary advocates, consumer advocates, educators, and counselors in community-based programs are all information intermediaries. Intermediaries play an increasingly important role in explaining and disseminating CAHPS results, and project teams need to carefully consider this group when making distribution decisions.

**Audience.** Information intermediaries are an audience in and of themselves. Some, such as benefits counselors, function in a formal, institutional capacity to develop and distribute CAHPS reporting materials and educate members about results; others, such as community-based advocates, act informally to explain CAHPS results and assist in decisionmaking. Sponsors will need to think about these various types of intermediaries and what kinds of orientation, training, and guidance they might need.

**Distribution methods.** Intermediaries are an important CAHPS distribution channel, not only in terms of physically distributing materials but also in interpreting and explaining the information contained in CAHPS reports and in providing decision support. Sponsors will need to think about what roles may be appropriate and inappropriate for intermediaries to play and recognize that they may have more control over some information intermediaries (e.g., benefits managers, Medicaid eligibility workers) than over others (e.g., community-based counselors).

**Distribution timing.** Information intermediaries will play a big role in the staging of various components of a CAHPS education campaign and in the timing of materials distribution. Benefits managers and counselors will also need time to see the results and get their questions answered before the reports are distributed to audiences.

Provide specific guidance to your benefits managers and others who will play an information intermediary role when CAHPS results for particular plans do not conform to their opinions or experiences with the plan and when results for plans that participated in the survey do not appear in the reports (this may occur because there were insufficient usable responses to include in the analysis). You will need to reinforce that the data are valid and useful for consumers even if they do not match previous opinions or even experiences of the individual intermediaries.

## Other Uses of CAHPS Results

You may also wish to produce reports for audiences other than consumers or for purposes other than health plan decisionmaking by consumers. These reports may look very different from the consumer print or computerized guides in terms of their appearance (e.g., no photos) and content (e.g., more data and more technical, analytic explanatory material).

These other audiences might include the following:

- Internal decisionmakers;
- Policymakers (e.g., government, legislative);
- Health plans; and
- Accrediting bodies (e.g., NCQA).

These other purposes might include the following:

- Monitoring and improving health plan quality;
- Negotiating and contracting with plans;
- Developing incentive structures for plans; and
- Evaluating health care delivery systems.

If you are planning on producing additional reports, think about the following issues:

**Consistency.** Any results presented in both the consumer report and any other report (e.g., those developed for health plans) must be consistent. At the same time, because of the greater amount of data presented and the degree of detail in the accompanying information, some results may appear to be different from the consumer report. Provide the context for and explain any of these differences. If you are planning to provide reports to individual plans with detailed data only for their own plan and not for others, provide benchmarks as well so that the plan can have a reasonable basis on which to judge the survey results.

**Sequencing.** If you are planning on producing multiple reports, decide who will get which reports and when. For example, consider whether participating health plans should receive reports before your consumer audiences.

**Communicating with plans.** Purchasers or other sponsors need to keep in mind that they are presenting information that may affect the reputation and revenues of participating health plans—both positively and negatively. Building open and clear communication with health plans about the CAHPS methodology, testing, and analytic decisions right from the start of your project can help to bolster the plans' confidence in the integrity of your results and minimize difficulties if the results are negative. Incorporating adequate time for health plans to review and comment formally on results before the reports are released can also help, as can review from your external advisory committee or independent technical reviewers.

**Analytic issues.** You may have already made some analytic decisions during your design phase, such as whether to analyze data on frequent and infrequent users of health care together or separately, or whether to analyze adult's and children's data separately. In thinking about your audiences for these other reports, their users' information needs, and any preliminary data results, revise or refine your initial analytic decisions. For example, you may find that after some early analysis, there is no difference in results between subgroups, such as frequent and infrequent users of health care. In this case, you might decide not to present a table on these two groups of users.

## Determining the Content of Your CAHPS Reports

As we noted in Chapter 2, focus on the content of your reports before data collection begins and include all members of your project team. For example, focusing on what information the reports will present will help you decide whether to add supplemental CAHPS items to your questionnaire and what, if any, non-CAHPS information you might want to include, such as benefits and cost information or other plan performance and quality information (e.g., what percentage of adult female members receive a mammogram every year).

### CAHPS Survey Results

Most of the content in the print and computerized guides will consist of CAHPS survey results. Incorporating these data into the reporting templates is a relatively straightforward procedure, and ***Instructions for Customizing the CAHPS Print Guide***, ***Computerized Guide***, and ***CAHPS Posters and Flyers*** appendixes on ***CD-ROM 2*** provide detailed instructions for your vendor.

### Plan-specific Information

The reporting products emphasize that CAHPS survey results are intended for use in conjunction with other information, such as costs and benefits, specifics on coverage, doctors participating in the plan, and the percentage of plan doctors who are accepting new patients. This information is typically supplied in enrollment packets distributed at the time a consumer is choosing a health plan. However, you may want to integrate some or all of this information with the survey results or tell consumers where they can find this information and how they can use it.

### Plan Performance and Quality Information

The CAHPS reports can easily be combined with other performance measures, often called "technical quality measures," that are increasingly available from sources such as NCQA[1] and Joint Commission on Accreditation of Health Care Organizations (JCAHO). The ***CAHPS 2.0 Analysis*** appendix on ***CD-ROM 3*** also includes guidance on using other plan performance measures in conjunction with CAHPS.

## Design Elements of the CAHPS Reporting Materials

The CAHPS development team explicitly designed the computerized and print guides to be flexible so that sponsors could modify them for their particular project and reporting needs. At the same time, they contain a number of design elements that are essential if results from a CAHPS survey are to be effectively conveyed to consumers. These elements were developed through focus groups, cognitive and psychometric testing, revision, and retesting, and that is why they must remain unaltered. To understand how the design elements were applied to the actual products, look at the sample print guide included in your Kit as you read this section. (These design elements also apply to the computerized guide.)

**Groupings of survey questions on a similar topic to simplify and condense the reporting of survey results.** The use of these groups, or composites, for reporting purposes is a fundamental basis for standardizing the reporting of CAHPS survey results. It allows for comprehensive reporting of condensed survey results, contributing significantly to the effectiveness of the formats. The CAHPS analysis program that computes the statistical results for graphs and charts contained in the reports is based on these specific composites. The composites are explained more fully in the ***CAHPS 2.0 Analysis*** appendix on ***CD-ROM 3***.

**Summary comparison charts that use stars to show how health plans performed based on statistical significance testing.** These comparison charts are useful because they allow consumers to focus on a topic of particular interest and compare across plans. The CAHPS reports testing showed that consumers wanted charts that could give them "the big picture." We combined this concept with other consumer testing that shows widespread familiarity with the use of stars to indicate relative rank.

[1] For more information about NCQA's HEDIS measures, contact ***NCQA's Technical Inquiry*** line at **(202) 955-5697**.

**Bar graphs to display more detailed reporting of the survey results.** Most of the bar graphs show the percentages for "always" and "usually" responses and a combined percentage for the remaining responses of "sometimes" and "never." Based on testing, we selected a format in which the center category is white and the left- and right-hand categories are full color and a lighter shade of the same color. This allows the reader to focus on either extreme and to compare across plans.

It is important to include both the comparison star charts and the bar graphs because each shows the survey results from a different perspective. The star charts reflect relative levels of performance (how well the plans that were surveyed perform compared with each other), and the bar graphs show absolute levels of performance (how well each plan does). For cost, space, technical, or other reasons, some sponsors choose to include only the bar graphs or star charts but not both. For example, HCFA includes only bar graphs in its presentation of Medicare data. That decision is acceptable, but whatever charts and graphs are included must be retained without alteration. For example, the orientation of the bars in the bar graphs; the 0 to 100 scale in the bar graphs; the legends and labels; and the text on the side in the star charts/bar graphs should remain as they are.

**Separate summary comparison star charts for adults and children.** Recognizing that there are important differences in adult and children's care, the reporting templates include comparison charts that show survey results separately for assessments of adults and children. You should retain this separation if your data include enough responses to report individually on adult care and children's care.

**A variety of navigational features.** Both the print and computerized guides include a number of navigational features (e.g., table of contents, cross-references from star charts to bar graphs, dotted lines, icons for different sections) to help consumers easily locate information of special interest. Although it takes some extra space to include these navigational features, we believe they contribute significantly to consumers' ability to find, understand, and use the information presented in the guides.

## Other Desirable Design Elements

The CAHPS reporting materials contain design features that sponsors may choose to include or leave out. Before deciding to include or exclude these features, carefully review your other health plan choice materials to see whether they include any of this information and to ensure that what is said in these other materials is consistent with the CAHPS materials. These features include the following background issues:

**The survey and how it was conducted.** The CAHPS print and computerized guides give more background about the survey itself than is typical for performance reports. Including this background information can enhance the credibility of the survey results and help educate consumers about the importance of the way in which surveys are conducted. The background information also serves to reinforce the idea that the survey is of people like you.

**The consumer perspective on quality of care as reflected in CAHPS survey results and as distinguished from clinical measures of technical quality.** The CAHPS questionnaires focus on topics for which consumers are the best or only judges of quality, such as whether they are treated with courtesy and respect and whether they get explanations from their providers that are easy for them to understand. To put the survey results into a broader context and to prevent misunderstandings by consumers, the CAHPS print and computerized guides explain what is meant by this concept of quality. This is information that consumers are not likely to be receiving elsewhere. Include the background text that supplies this explanation and adapt or expand it as appropriate for your circumstances.

**The different types of health plans.** CAHPS questionnaires are designed for use with the full range of health care delivery systems. The types of plans often affect how plan members get their care, which in turn has relevance for some of the survey questions. For this reason, the type of plan (i.e., fee-for-service, HMO, PPO, POS) is identified in a column next to the plan name in the comparison charts.

Given the importance of type of plan and consumers' widespread confusion about differences among types of health plans, the print and computerized guides also include information that explains the various types of health plans and how they work. Consumers are not likely to be seeing this information elsewhere. Because CAHPS projects will differ greatly in the types of plans being compared, this explanatory text will need to be adapted to suit your needs.

## Design Elements of Other CAHPS Reporting Materials

The CAHPS posters and flyer provide crucial messages about the importance of quality as a factor in health plan decisionmaking, as well as information about the survey and sponsor. They provide lots of opportunities for customizing and should be adapted by sponsors to suit their specific needs and situation. The video, which introduces the CAHPS survey and provides important contextual information for consumers and other users, is general enough for use by all commercial sponsors and cannot be altered.

## Linking the Design Elements in the Reporting Materials to Their Functions

Earlier in the chapter we described the various functions of each of the CAHPS reporting materials. As shown in Table 3-2, the content of the reporting materials was designed explicitly to carry out these functions. As you think about your short- and long-term objectives in reporting CAHPS results and develop your plans for customizing the reports, keep these functions in mind.

***Table 3-2. Content of CAHPS reporting materials and design functions***

| | Announce | Motivate | Educate | Inform | Support decisionmaking |
|---|---|---|---|---|---|
| **Video** | | - Benefits meeting | | - Background on CAHPS and importance of quality | |
| **Posters** | - Open enrollment information<br>- Sponsor information | - Key messages about importance of quality in decisionmaking | | | |
| **Flyer** | - Sponsor information<br>- Dates for release of survey results | - Key messages about importance of quality in decisionmaking | | | |
| **Print guide** | | | - Information about importance of quality in health plan choices<br>- Information about differences between types of health plans | - Star charts/ bar graphs<br>- Specific facts about plans<br>- Explanatory text about survey | - Results plus explanatory material<br>- Facts about plans that help reader prioritize<br>- Non-CAHPS information (e.g., benefits, cost) |
| **Computerized guide** | | | - Information about importance of quality in health plan choices<br>- Information about differences between types of health plans | - Star charts/ bar graphs<br>- Specific facts about plans<br>- Explanatory text about survey | - "Review the Results" screen<br>- "Completing Your Work-sheet" screen to aid plan comparison<br>- Non-CAHPS information |

## Adapting the Look of Your CAHPS Reports

As you plan and revise your reporting strategy, you will need to decide how to adapt the templates to meet your audiences' and needs. Make these adaptations consistent across all the materials (the only exception is the video, which cannot be altered).

Early in the report planning process work with your in-house design team, computer programmer, or your reports vendor to develop one or more mock-ups of your reporting materials and circulate them for review and comment. It requires extra time and some financial commitment, but it will be worth it if you will be able to prevent or anticipate problems and challenges while there is still time to make changes. It will also provide a good basis for realistic budgeting and scheduling.

As you develop the mock-up, you may want to consider adaptations to the templates in the following areas:

**Adapting the format.** You have some flexibility in adapting the format of the CAHPS templates to suit your needs and the look you want for the materials. In fact, make these adaptations so as to create materials that work for you and that can be clearly identifiable as the products of your CAHPS project. For example, in the print guide you can choose the colors for text and headlines, select the font style and size (you may increase the size, but we recommend that you do not make it smaller), pick photos that suit your organization and project, include your organizational logo, and adapt text about where and how to get additional information.

**Including supplemental items.** The CAHPS reporting templates allow you to present results only for the core questionnaire. It is easy, however, to include supplemental items in the same manner that the core items are shown. In looking at how the reporting templates present the core items and considering how to show supplemental or your own added items, consider the overall length and organization of your report. (Chapter 4 provides a more detailed discussion of the core and supplemental questionnaires.)

Include in the consumer reports only those items that pertain to all plans covered by your survey. Items that are specific to one or more but not all plans should be used only for reports to other audiences (such as health plans). Readers may think information is being withheld from them if they see information on some plans but not on others.

**Changing the number of plans for which data are presented.** Despite your best efforts to maintain high response rates, one or more plans may not have enough returned questionnaires to meet the minimum suggested for presenting the results or a health plan may split or merge. These circumstances may cause you to exclude one or more plans that originally were covered by your survey. If this happens, you will need to carefully explain the reason objectively so that readers do not think that something negative about the plan is being hidden from them.

**Adapting the reports for special needs audiences.** The reporting templates are geared toward commercially insured consumers. If your audience is Medicaid recipients, the products will need to be adapted. Contact SUN for assistance at **(800) 492-9261**.

**Changing the level of detail presented.** If you choose to develop reports for audiences other than consumers, such as reports for purchasers, health plans, or policymakers, include detailed survey results and different explanatory text around the results (geared either to the technical aspects of the results and your analysis or toward the purchasing, quality improvement, or policy-related aspects). If you choose to develop reports that contain a greater level of detail, you will need to agree with these audiences on such issues as data ownership and privacy, timing, method of distribution, and content (e.g., do all organizations get the same level of detail and are there any restrictions on how they can use it?). Check on laws that govern public release of the survey data to better understand these issues.

## Working with the News Media

Your CAHPS project team will need to plan ahead about how to work with the media and other interested groups. Incorporate this into your reports planning. You may even want to hire a public relations professional to advise you or assist with handling media relations.

Sponsors should develop a media strategy and prepare a news media kit. The kit should give background on the project, summarize the highlights of the survey results, and include caveats and other information that will help the news media and other users put the project into a broader context. The goal of the kit is to help the media present a careful and accurate interpretation of the project and the survey findings.

As you design a strategy for dealing with the news media, think in terms of which types of information will be most interesting and useful to reporters and how to make the information readily available to them. Some sponsors will also need to coordinate with their organization's other media activities. Remember that the idea of reporting publicly on plan performance from the consumer perspective may be new to members of the news media as well as to many readers. Therefore, provide an overall context and explain the project in detail to educate as well as inform.

The following items should be included in the news media kit:

- A formal news release, preferably with some quotes from stakeholders and consumers;
- A briefing paper that provides answers to frequently asked questions, addresses concerns, corrects potential misinterpretations, and cites accomplishments and limitations of the project; and
- Selected camera-ready graphs, charts, and copies of documents that may be useful to the news media. These materials include descriptions of CAHPS, lists that identify organizations involved with the project and names of spokespersons, and project-related documents that provide more detail than is typically included in news releases.

***Getting Technical Assistance from SUN***

Call ***SUN Help Line*** at **(800) 492-9261** for CAHPS project information and materials that might be helpful in developing a media kit.

A media kit distribution list is an important element of any media planning process. In preparing this list, project planning teams should give some consideration to using the kit more broadly by expanding its distribution beyond members of the print and electronic media. For example, the kit can be a useful tool in an overall health plan and quality education campaign. It also can be a good way to inform organizations in a community that may have special interest in the survey results. These organizations include health-related groups, groups that advocate on behalf of consumers, and groups that have general civic interests. Some of these organizations may have newsletters, and they may use the news media kit as a resource for writing a story in their own publications. Or they may use it in other ways, such as a catalyst for discussion or as a resource for responding to comments and inquiries from their membership or from the news media. Broader distribution of news media kits involves a fairly modest expenditure that may have big payoffs in terms of community visibility for the project and enhanced goodwill. It may also enhance the likelihood of accurate interpretations of the survey findings.

As you develop your media strategy and the contents of the news media kit, involve key stakeholders, including the health plans, in order to benefit from their suggestions and to keep all parties informed. Other than the specifics of the survey findings themselves, drafts of much of the kit can be prepared well in advance and circulated to your stakeholders for review.

Timing of the distribution of the news media kit is crucial; you must give reporters some lead time, but not too much. You may want to hold a formal news conference in conjunction with releasing your results in the news media kit. Make sure that health plans, purchasers, and other stakeholders receive copies of the final news media kit either before or at the same time that the news media does.

***Notes From the Field***

In the state of Oregon, members of the purchasing coalition that sponsored the CAHPS surveys were concerned about the release of the information to the public. In particular, they wanted to make sure that health plans followed certain "ground rules" in any marketing or other public dissemination of the survey results. Therefore, as part of the process of planning for CAHPS, the purchasers asked each health plan being surveyed to sign a formal agreement on these ground rules. Specifically, plans had to promise that if they did publish CAHPS results, they had to publish results on all the CAHPS dimensions for all the plans surveyed for which there were results. In that way, plans could not "pick and choose" the most favorable results and the more favorable comparisons while suppressing others.