Survey Pilot Cheat Sheet/Guide

About Survey

- Dara to share a list of clients for you to follow up with
- The goal will be for you to contact 10 clients (the remaining clients are buffers, if you cannot contact anyone due to diagnosis, SDM, language, availability, etc)
    - CSS – the goal is to tack on the questions to your home visits over the month
    - SW, CM and Intake – you will ask questions by phone (unless CMs – you have a home visit scheduled)
    - You can always survey more if its going well!
- **<u>This is just part of a pilot – do the best you can.</u>**
    - We will advise Sinai about what its like to ask these questions in a community setting (comparing in person to by phone), so if you get limited info, that is ok! Any/all client results and feedback from you is greatly appreciated.
- If a client has any questions about how you got their info, you can tell them that this is a random sample of our Toronto Central LHIN clients and this work is contributing to a study on better understanding the population that we serve and how we can improve our services.
- If at any point you have questions, let me know

Steps to Completing Survey

1. Review client chart prior to calling client – you can decide which clients to call

- If you aren't sure they are appropriate, you can skip to another client.
- Things to check before calling:
    - Diagnosis
    - CaseNotes
    - Who to Contact
    - Are they survey capable (the checkbox on the info tab just above smoker and pet status). This may not be totally up to date, so also validate against casenotes/client info
- Always call the client first. If the client wants you to follow up with family, that is ok. If they don't understand or can't answer, record this on the spreadsheet (it counts as a client contacted) and move on.

2. Introduce yourself

3. Explain purpose of the study:

"As part of a 1 month pilot from the Toronto Central LHIN, we are collecting demographic data from our clients. The purpose is to know who we serve, provide quality care and bring best outcomes to all clients."

4. Ask consent to proceed with questions

- <u>This is completely voluntary</u>
    - Clients can choose either to not continue (indicate on the spreadsheet); OR:
    - Continue and 'Prefer not to answer' any question
    - Not answering will not affect your care.
- Please reiterate that the information is confidential – nothing will be recorded their health record nor shared with anyone.
- All data will be anonymous as part of reporting back in the survey

5. Start asking questions and record the responses
    - Use the spreadsheet to record all of the answers using the drop down
    - No Answer/Prefer not to answer is considered an answer and you should record it
    - You can either read the options listed on the questionnaire, or have them answer how they choose
    - For the income question, listing the brackets could be more helpful

6. Thank the client for their time and participation

7. If the client has questions about the survey, please direct them to: ***Sinai Health System Health Equity Office Phone: 416-461-8252 x2360***

Using and Saving the Spreadsheet

1) The spreadsheet should be used to track the responses of the 8 questions
2) Try and complete all columns as appropriate – including the client ID, DOB, Postal Code
3) Most columns have a drop down and you can select the appropriate answer from that
4) If the client does not give consent to participate in the survey – indicate that in the Consent Given column and do not continue recording data
5) If the client does not answer/give consent to specific questions, record that in the specific column as Prefer Not to Answer
6) Save the spreadsheet in the P drive and label it with your name: Measuring Health Equity Data_FirstNameLastName (i.e Measuring Health Equity_DaraZarnett)
7) When you finish, send the completed spreadsheet to Dara at dzarnett@circleofcare.com by **March 8th**

Other Info

- If throughout the interview, the client raises any issues/questions about their care, you are not expected to manage this if you are not their primary contact.
    - Ask them if you can raise this concern to the most appropriate person – i.e CSS, SC, Manager
    - Complete a task console to share the complaint as appropriate
    - In the task console, do not indicate any responses from the survey as these will remain anonymous

- You can always re-direct them to the SHS office on Health Equity (see above)

Thank you again for your help. This is a pilot and we'll do what we can to help support the survey, but there is no pressure to get answers from every client.