



# HCHS/SOL Annual Follow-Up Interview

## Outpatient Self-Reported Conditions – OPE – QxQ

Updated on 3/25/2025

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### Background

The purpose of the yearly follow-up phone interviews for HCHS/SOL is to document medical events occurring every year from the baseline examination (Visit 1). These annual follow-up interviews maintain and update cohort contact information and ascertain vital status. The follow-up interviews are to be conducted by telephone in English or Spanish. Annual follow-up interviews will continue to occur approximately every 12 months from the baseline (Visit 1) anniversary date. The timing of the annual follow-up interviews is described in more detail in Manual 3-Retentionand-Follow-up (formerly Manual 3 and Manual 16) available on the HCHS/SOL website.

**Note on using alternate designated respondent (ADR):** Before initiating an AFU interview, HCHS/SOL personnel should review records from the last completed interview with the participant. If the previous interview was conducted with an ADR due to participant's cognitive impairment, the ADR should again be contacted to schedule the follow-up interview. Historic ADR information (if available) can be obtained from the CIE(S) form from the previous year.

### OPE(S) (Out-Patient Self-Reported Conditions)

In this section we seek information about specific conditions that led seeking and receiving medical attention as an outpatient. For the purposes of this section, outpatient treatment is defined as episodes other than a hospital admission or care in an emergency room. This section applies to visits to a doctor's office or a non-emergent medical care facility. Start this section out by saying the following introduction:

English: *"Now I would like to ask you about conditions that may have resulted in you seeing a doctor or health profession at a clinic or doctor's office, but not actually being admitted to the hospital or visiting an emergency room."*

Spanish: *"Ahora me gustaría preguntarle sobre condiciones que le hayan motivado a que fuera a ver a un doctor o un profesional de la salud en una clínica o un consultorio médico, sin tener que ser admitido(a) al hospital y sin tener que ir a la sala de emergencias."*

By asking "Since our last interview with you, has a doctor or health professional said...", we are interested in identifying *newly* occurring, or *newly* diagnosed conditions. If a participant responds by saying "Yes, my doctor told me that I have chronic bronchitis and I have had this for several years" the response to this question (question 5) is No. If the answer provided by the participant to questions in Section C suggests to the interviewer that this may not be a condition that has newly occurred since the last AFU interview, the participant is asked to clarify whether this is the first time a physician has said that she/he has this condition. Only new diagnoses of a condition since the last contact with the participant are recorded as Yes.

**Q5** Since our last telephone interview with you on (*date*), has a doctor or health professional told you that you had emphysema, chronic bronchitis, or chronic obstructive pulmonary disease (COPD)? This does not include doctor's visits for tuberculosis or TB.

This question asks the participant to recall whether in the past year since their SOL telephone interview they had a diagnosis of COPD in an outpatient setting. **Be careful to stress that this does not include doctor visits for tuberculosis.**

It is likely that a doctor or health professional used other terms such as emphysema or chronic bronchitis. If the participant indicates they had such an event, the interviewer moves on to ask specific questions about this episode. If the participant denies any outpatient diagnoses of COPD, emphysema or chronic bronchitis then the interviewer skips to Q6.

**Q5a-c** This series of questions is intended to collect information about specific tests that might have been done in conjunction with the outpatient visit for COPD emphysema or chronic bronchitis. Introduce the series of questions 5a-c by asking the following:

*“Did your doctor or healthcare professional order any of the following tests to help make the diagnosis?”*

**Q5a** Breathing test or pulmonary function test?

Collect and record whether a breathing test or pulmonary function test was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to questions 5a.

**Q5b** Chest X-ray?

Collect and record whether a chest X-ray was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to questions 5b.

**Q5c** CT Scan of your chest?

Collect and record whether a computed tomography (CT) scan of the chest was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to questions 5c.

**Q5d** Were you told by a doctor or health professional that you were having an attack, worsening, or an exacerbation of your emphysema, chronic obstructive pulmonary disease (COPD), or chronic bronchitis?

The purpose of this question is to determine if the recalled episode was actually an exacerbation of their emphysema, chronic obstructive pulmonary disease (COPD), or chronic bronchitis. It is likely that the term “exacerbation” may not be well understood by the participant. Take time to clearly communicate the terms “attack” and “worsening”. For the purpose of this question, any attack, sudden onset, increase in severity, or increase in frequency of symptoms is sufficient to record YES.

**Q5e** Did the doctor or health care professional prescribe a change in your medication, such as increasing your inhalers, oxygen, or pills for your lungs or prescribing a steroid pill for your lungs?

The purpose of this question is to collect information that helps in determining if the recalled episode was an exacerbation. A change in medication in response to an acute event is evidence of a true exacerbation of the condition. Collect and record if the participant had their medication changed as a result of this episode.

**Q6** Since our last telephone interview with you on (date), has a doctor or health professional told you that you had asthma?

This question asks the participant to recall whether in the past year since their last SOL telephone interview they had a diagnosis of asthma in an outpatient setting. If the participant indicates they had such an event, the interviewer moves on to ask specific questions about this episode. If the participant denies any outpatient diagnoses of asthma, then the interviewer skips to Q7.

**Q6a-c** This series of questions is intended to collect information about specific test that might have been done in conjunction with the outpatient visit for asthma. Introduce the series of Q6a-c by asking the following:

*“Did your doctor or healthcare professional order any of the following tests to help make the diagnosis?”*

**Q6a** Breathing test or pulmonary function test?

Collect and record whether a breathing test or pulmonary function test was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to Q6a.

**Q6b** Chest X-ray?

Collect and record whether a chest X-ray was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to Q6b.

**Q6c** CT Scan of your chest?

Collect and record whether a computed tomography (CT) scan of the chest was ordered or performed. For the purposes of this question, if a test was ordered and attempted but not completed this is sufficient to record YES to Q6c.

**Q6d** Were you told by a doctor or health professional that you were having an attack, worsening or an exacerbation of your asthma?

The purpose of this question is to determine if the recalled episode was actually an exacerbation of their asthma. As previously, it is likely that the term “exacerbation” may not be well understood by the participant. Take time to clearly communicate the terms “attack” and “worsening”. For the purpose of this question, any attack, sudden onset, increase in severity, or increase in frequency of symptoms is sufficient to record YES.

**Q6e** Did the doctor or health care professional prescribe a change in your medication, such as increasing your inhalers, oxygen, or pills for your lungs or prescribing a steroid pill for your lungs?

The purpose of this question is to collect information that helps in determining if the recalled episode was an exacerbation. A change in medication in response to an acute event is evidence of a true exacerbation of the condition. Collect and record if the participant had their medication changed as a result of this episode.

**Q7** Since our last telephone interview with you on (date), has a doctor or health professional told you that you had diabetes or high sugar in the blood?

If the answer is No or the participant is UNSURE, then go to Q8.

**Q7a** Did the doctor recommend any new or different treatments?

The purpose of this question is to determine whether or not the participant was treated for this reported diabetes. If treatments such as medications were recommended but the participant didn’t actually obtain and/or take the medications, record YES. If the answer is No or the participant is UNSURE, then go to Q8.

**Q7b** What treatment was recommended?

Do not read the response options. Listen to the participant’s response and prompt if necessary for understanding. Record the treatments in the category that is most appropriate. If you are not sure whether a recalled treatment fits into a category, record Other and specify the treatment in the space provided.

**Q8** Since our last telephone interview with you on (date), has a doctor or health professional told you that you had high blood pressure or hypertension?

If the answer is No or the participant is UNSURE, then go to Q9.

**Q8a** Did the doctor recommend any new or different treatments?

The purpose of this question is to determine whether or not the participant was treated for this reported high blood pressure or hypertension. If treatments such as medications were recommended but the participant didn't actually obtain and/or take the medications, record YES. If the answer is No or the participant is UNSURE, then go to Q9.

**Q8b** What treatment was recommended?

Do not read the response options. Listen to the participant's response and prompt if necessary for understanding. Record the treatments in the category that is most appropriate. Select all that apply. If you are not sure whether the recalled treatment fits into a category, record other and specify the treatment in the space provided.

**Q9** Since our last telephone interview with you on (date), has a doctor or health professional told you that you had high blood cholesterol?

If the answer is No or the participant is UNSURE, then go to Q49.

**Q9a** Did the doctor recommend any new or different treatments?

The purpose of this question is to determine whether or not the participant was treated for this reported high blood cholesterol. If treatments such as medications were recommended but the participant didn't actually obtain and/or take the medications record YES. If the answer is No or the participant is UNSURE, then go to Q49.

**Q9b** What treatment was recommended?

Do not read the response options. Listen to the participant's response and prompt if necessary for understanding. Record the treatments in the category that is most appropriate. Select all that apply. If you are not sure whether a recalled treatment fits into a category, record other and specify the treatment in the space provided.