

Attachment 10

Follow-up Phone Scripts

SPARCCS

Reminder to Complete Survey Telephone Script 1st Call

Public reporting burden for this collection of information is estimated to vary from 3 to 5 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. **An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.** Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: NIH, Project Clearance Branch, 6705 Rockledge Drive, MSC 7974, Bethesda, MD 20892-7974, ATTN: PRA (0925-xxxx*). Do not return the completed form to this address.

Hello, my name is [INTERVIEWER NAME] and I'm calling regarding a national physicians' survey sponsored by The National Cancer Institute. We sent Dr. [INSERT DR'S NAME] a package by priority mail two weeks ago and had not received a response and sent another one on (DAY/DATE). I wanted to check and make sure that Dr. [INSERT DR'S NAME] received it?

YES - SURVEY WAS RECEIVED

I'm glad it arrived. Would you be willing to put it on (his/her) desk and make sure (s/he) sees it? [Thank you.]

I would also like to leave a message for Dr. [INSERT DR'S NAME], could you transfer me to (his/her) voice mail?

[TRANSFERRED TO VOICE MAIL - GO TO VOICE MAIL SCRIPT]

[SECRETARY WANTS TO TAKE A MESSAGE - GO TO WRITTEN MESSAGE]

NO - SURVEY WAS NOT RECEIVED / NOT KNOWN IF IT WAS RECEIVED

It was sent by Priority Mail on (DAY/DATE). (IF NEEDED READ ADDRESS).

[IF YES]

Thank you, when would be a good time for me to call you back to verify that the doctor has received the package? [NOTE DATE AND TIME IN SYSTEM]

I would also like to leave a message for Dr. [INSERT DR'S NAME] so (s/he) knows that we are trying to get a package to (him/her)? Could you please transfer me to (his/her) voice mail.

[TRANSFERRED TO VOICE MAIL – GO TO VOICE MAIL SCRIPT]

[SECRETARY WANTS TO TAKE A MESSAGE - GO TO WRITTEN MESSAGE]

[IF NO or NOT WILLING TO ASSIST IN TRACKING PACKAGE DOWN]

May I please speak to someone who would be able to help me track down the package?

[IF YES, NOTE NAME AND TELEPHONE NUMBER OF NEW CONTACT IN THE SYSTEM. AWAIT TRANSFER, OR MAKE NEW CALL]

Hello, my name is [INTERVIEWER NAME], and I am calling regarding a national physicians' survey sponsored by The National Cancer Institute. We sent Dr. [INSERT DR'S NAME] a package two weeks ago by priority mail and did not receive a response. We sent another one on (DAY/DATE).

[IF YES]

Thank you. When would be a good time for me to call you back to verify that the doctor has received the package? [NOTE DATE AND TIME IN SYSTEM]

I would also like to leave a message for Dr. [INSERT DR'S NAME] so that (he/she) knows that we are trying to get the package to (him/her)? Could you transfer me to (his/her) voice mail?

[TRANSFERRED TO VOICE MAIL – GO TO VOICE MAIL SCRIPT]

[SECRETARY WANTS TO TAKE MESSAGE- GO TO WRITTEN MESSAGE]

[IF NOT ABLE TO SPEAK TO SOMEONE TO ASSIST]

I would like to leave a message for either the office manager or someone who would have contact with the package?

[TRANSFERRED TO VOICE MAIL – GO TO VOICE MAIL SCRIPT]

[SECRETARY WILL TO TAKE MESSAGE- GO TO WRITTEN MESSAGE]

IF TRANSFERRED to DOCTOR or DOCTOR ANSWERS THE PHONE

Hello Dr. [INSERT DR'S NAME], my name is [INTERVIEWER NAME] and I'm calling regarding a national physicians' survey sponsored by The National Cancer Institute. I'm sorry to bother you, but I want to confirm that you have received the survey, which is about your perspectives regarding the care you provide to cancer survivors who have completed active treatment for their disease. We sent one on (DATE) and didn't get a response, so we sent another one on (DAY/DATE) that should have already arrived. Have you seen it?

[IF YES]

Great. We look forward to your response. If you have any questions, we can be reached at **1-888-xxx-xxxx**.

[IF NO]

Should I send you another survey?

[WILL CHECK WITH PERSON]

If you are unable to locate the survey, we will be happy to send you another.

[SEND ANOTHER SURVEY]

What address should I use to ensure that it gets to you? [ENTER NEW ADDRESS IN SYSTEM]

Thank you for your time. We look forward to hearing from you.

[IF NO ANSWER OR TRANSFERRED TO VOICEMAIL, LEAVE VOICEMAIL MESSAGE]

VOICEMAIL SCRIPT

Hello, my name is [INTERVIEWER NAME] and I am calling on behalf of The National Cancer Institute to confirm that you received an important national physician's survey on your perspectives regarding the care you provide to cancer survivors who have completed active treatment for their disease. Your response is very important.

If you have not received the survey, or if you have questions, please call us at **1-888-xxx-xxxx**.

Thank you.

WRITTEN MESSAGE

Please tell Dr. [INSERT DR'S NAME] that a study sponsored by The National Cancer Institute has sent (him/her) a survey, and we would greatly appreciate it if (s/he) would complete and return it within the next several days. If (s/he) has any questions, please ask (him/her) to call **1-888-xxx-xxxx**.

REQUEST FOR REPLACEMENT SURVEY

Sure, I'd be happy to send a replacement package.

[IF SPEAKING TO THE DOCTOR]

When do you expect that you can complete and return it?

Thanks so much.

[RECORD DATE THAT THE SURVEY SHOULD BE MAILED IN THE NOTES SECTION].

[CODE FOLLOWUP STATUS AS **REMAIL 2**].

[IF SPEAKING TO AN ADMINISTRATIVE ASSISTANT]

Would you be willing to look for it when it arrives, and be sure that Dr. [INSERT DR'S NAME] sees it?

Thanks so much for your help.

[CODE FOLLOWUP STATUS AS **REMAIL 2**].

REQUEST FOR REPLACEMENT CHECK

[IF THE PHYSICIAN AGREES TO FILL OUT THE SURVEY, BUT SAYS HE DID NOT GET A CHECK AND WANTS A REPLACEMENT CHECK]:

We would be happy to send you another check. [CONFIRM OR UPDATE THE ADDRESS].

It should arrive in about five days. When do you expect that you will be able to complete and mail the survey?

Thanks so much. We look forward to receiving that information.

[IN THE NOTES SECTION, RECORD DATE THAT THE CHECK SHOULD BE MAILED AND UPDATE THE ADDRESS IF NEEDED.].

[CODE FOLLOWUP STATUS AS **CHECK ONLY NEEDED**].

SPARCCS

Reminder to Complete Survey Telephone Script 2nd Call

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Goals for Second Call:

(1) Ask the receptionist for the best way to get a message to the doctor.

(2) Leave a reminder message for the doctor.

If you have already left more than one reminder message for the doctor in the past five days, please don't leave another.

SPARCCS

Reminder to Complete Survey Telephone Script 2nd Call

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Hello, my name is [INTERVIEWER NAME], and I am calling regarding a national physicians' survey sponsored by The National Cancer Institute. I called on (DAY/DATE) and spoke to [INSERT NAME] regarding a package we sent to Dr. [INSERT DR'S NAME] on (DAY/DATE). We still haven't received a response; do you know if s/he has had time to review it?

YES REVIEWED

Great. Dr. [INSERT DR'S NAME]'s feedback is very important to The National Cancer Institute. What's the best way for me to leave a message that we are eager to receive (his/her) response?

[TRANSFERRED TO VOICE MAIL – GO TO VOICE MAIL SCRIPT]

[SECRETARY WANTS TO TAKE A MESSAGE - GO TO WRITTEN MESSAGE]

[TRANSFERRED TO DOCTOR – GO TO TRANSFERRED TO DOCTOR SCRIPT]

NO OR DON'T KNOW IF REVIEWED

We called on (DAY/DATE OF PREVIOUS CALL) and verified that it was most likely received on (DATE). What's the best way for me to leave a message that we are eager to receive (his/her) response?

[TRANSFERRED TO VOICE MAIL – GO TO VOICE MAIL SCRIPT]

[SECRETARY WANTS TO TAKE A MESSAGE - GO TO WRITTEN MESSAGE]

[TRANSFERRED TO DOCTOR – GO TO TRANSFERRED TO DOCTOR SCRIPT]

Thank you for your time.

TRANSFERRED TO DOCTOR OR DOCTOR ANSWERS

Hello Dr. [INSERT DR'S NAME], my name is [INTERVIEWER NAME], and I'm calling regarding a national physicians' survey sponsored by The National Cancer Institute. The survey about your perspectives regarding the care you provide to cancer survivors who have completed active treatment for their disease. We sent you the survey on (DATE). I called on (DATE) to make sure you received the questionnaire. Have had the chance to complete the questionnaire yet?

COMPLETED SURVEY

Thanks so much. We haven't received it yet. Do you know when you sent it? [RECORD DATE IN NOTES]. (IF NOT ALREADY MAILED) We would appreciate your returning it as soon as possible and thanks again.

HAS SURVEY BUT NOT COMPLETED

This survey is an important part of a study being sponsored by The National Cancer Institute and to ensure the validity of the findings, we need responses from as many physicians as possible. It should only take about 20 minutes to complete and if you would prefer to complete it by telephone I can arrange that. We look forward to your response. Do you have a sense of when you can fill out the survey and return it to us? [WRITE DATE IN NOTES IF OBTAINED]. Thanks so much.

WANTS TO SCHEDULE AN APPOINTMENT TO COMPLETE BY PHONE

When would you like to schedule an appointment? [EXPLAIN THAT OUR RESEARCH ASSISTANT WILL CALL HIM/HER TO CONFIRM THE APPOINTMENT].

NOT SURE WHEN WILL COMPLETE

I understand your time is valuable. This survey could affect the care you provide to cancer survivors who have completed active treatment for their disease so your opinions are very important. If you have any questions or if you would like to complete the survey by phone please contact us at **1-888-XXX-XXXX**.

Thank you for your time.

HAS NOT SEEN OR RECEIVED SURVEY

We would be glad to send you another survey.

IF YES

We sent the last one to you at (VERIFY NAME AND ADDRESS). Should we use that same address? [IF UPDATED, RECORD IN DATABASE]

When do you expect that you can fill it out and return it?

Thanks so much.

[RECORD DATE THAT THE SURVEY SHOULD BE MAILED IN THE NOTES SECTION].

[CODE FOLLOWUP STATUS AS **REMAIL 2**].

IF NO

Your participation is very valuable to us. This survey could affect the care you provide to cancer survivors who have completed active treatment for their disease. I could set up a time that is convenient for you to complete the survey by telephone if you prefer.

IF YES TO TELEPHONE INTERVIEW

The number is **1-888-XXX-XXXX**. The person you will be contacting is [INSERT RA'S NAME], our Research Assistant, and s/he is at that number between the hours of 9 and 5, Eastern Time. I will let [INSERT RA'S NAME] know that you will be contacting him/her.

IF STILL NO

Thank you for your time and code as refusal.

REQUEST FOR REPLACEMENT CHECK

[IF THE PHYSICIAN WANTS A REPLACEMENT CHECK]:

Sure, we'd be happy to send you another check, and I'll get that process started now. It should be there in about five days. When do you expect that you will be able to complete and mail the survey? [RECORD DATE IN NOTES]. Thanks so much. We look forward to receiving that information.

[CODE FOLLOWUP STATUS AS **CHECK ONLY NEEDED**].

WRITTEN MESSAGE

Please tell Dr. [INSERT DOCTOR'S NAME] that The National Cancer Institute has sent (him/her) a survey, and would greatly appreciate it if (s/he) would complete and return it within the next several days. If (s/he) has any questions, please ask (him/her) to call

1-888-XXX-XXXX.

NO ANSWER/TRANSFERRED TO VOICEMAIL

VOICEMAIL SCRIPT

Hello, my name is [INTERVIEWER NAME] and I am calling regarding a survey sponsored by The National Cancer Institute.

I'm following up on a call from (DAY/DATE) to verify that you received an important survey about the care you provide to cancer survivors who have completed active treatment for their disease. We look forward to your response and would appreciate you completing and returning the survey at your earliest convenience. Your participation is very important to the study.

If you need another survey, you have a question, or if you would like to answer the survey questions by telephone, please give us a call at **1-888-XXX-XXXX**.

If you are not providing primary care at this time, please leave us a message with your name and current specialty. Thank you.

SPARCCS – Physician Study

Reminder to Complete Survey Telephone Script 3rd Call

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- THIS CALL TO OCCUR 10 BUSINESS DAYS AFTER LAST CALL
- EDUCATE THE RECEPTIONIST ABOUT THE STUDY AND TRY TO ENLIST HIS/HER HELP
- TRY TO SPEAK TO THE DOCTOR DIRECTLY
- IF UNABLE TO SPEAK TO DOCTOR DIRECTLY, SPEAK TO NURSING ASSISTANT OR ADMINISTRATIVE ASSISTANT TO DETERMINE WHETHER TO SEND ANOTHER PACKAGE AND TO LEAVE A MESSAGE.
- OTHER OPTION IS TO SEND FAX
- PLEASE MAKE DETAILED NOTES

It seems unlikely that you will be allowed to speak to the doctor without explaining the importance of the survey. So, if the receptionist will not give you the time to explain, you must try to speak to the doctor's nursing assistant, administrative assistant, or the office manager.

Reminder to Complete Survey Telephone Script 3rd Call

Short Script- Secretary

Hello, my name is [INTERVIEWER'S NAME] and I am a researcher working on behalf of The National Institutes of Health. We have sent two study packages by Priority Mail and have left messages for Dr. [INSERT DR'S NAME], but we haven't received his completed survey. **Is there any way that I can speak to him/her** directly?

[IF YES, RECORD CALL BACK TIME OR GO TO PHYSICIAN SCRIPT IF TRANSFERRED].

[IF NO, GO TO UNABLE TO SPEAK TO DOCTOR SCRIPT]

Long Script- Secretary, Nursing Assistant, Administrative Assistant

[USE THE FOLLOWING "SOUND BITES" AS APPROPRIATE FOR THE PARTICULAR SITUATION].

Hello, my name is [INTERVIEWER'S NAME] and I am a researcher working on behalf of the National Institutes of Health.

[I/a coworker) may have spoken to you before about an important study about the care you provide to cancer survivors who have completed active treatment for their disease. (IF APPROPRIATE): (Yes, it's me again!).

I apologize for taking so much of your time, because **I know you are busy**. Could you advise me? Do you know if s/he still has the survey? (or could you connect me with his **nursing assistant** or **administrator** who might know whether s/he still has it?)

Do you know if the doctor provides patient care for at 20 percent time or at least one day a week?

[IF **NO** please get details and add to comments section].
Thank you so much for your assistance. [END CALL]

[IF **YES** continue]

Do you know whether the doctor is a Federal employee, working in the Veterans administration, Indian Health Services, or Armed Forces facility?

[IF **YES**, please get details and add to comments section].
Thank you so much for your assistance.

[IF **NO**, continue].

Is the doctor's specialty _____?

[IF NOT FAMILY PRACTICE, GENERAL INTERNIST, OBGYN, or ONCOLOGIST]:
Thank you for that important information. Do you know **what kind** of specialty services Dr. [INSERT DR'S NAME] provides?

You have been very helpful. Thank you so much. It is not necessary that the doctor fills out the survey. [RECORD SPECIALTY IN NOTES AND CODE AS NEEDS SUPERVISOR ATTENTION].

[IF DOCTOR IS ONE OF THE TARGETED SPECIALTIES]:
Then, Dr. [INSERT DR'S NAME] response is vital to this study. We haven't received a response, even though we have sent two surveys by Priority Mail and have left messages (as you may know). We're really in a bind -- we really need (his/her) response.

(This is an important study -- findings will affect the care you provide to cancer survivors who have completed active treatment for their disease).

I know that Dr. [INSERT DR'S NAME] is probably very busy. **Is there a way that I can speak to him/her** directly?

[IF YES, RECORD CALL BACK TIME AND NUMBER TO CALL, OR GO TO PHYSICIAN SCRIPT IF TRANSFERRED].

No Way to Speak to Doctor

(IF NO WAY TO SPEAK TO DOCTOR)

I apologize for taking so much of your time, because **I know you are busy**.

Could you advise me? Do you know if s/he still has the survey?

(or could you connect me with his **nursing assistant** or **administrator** who might know whether s/he still has it?)

We often find that the **mail gets buried or discarded**, and I'd be willing to send another package if s/he needs it.

(IF TRANSFERRED TO NURSING ASSISTANT OR ADMINISTRATOR, GO TO THE TOP OF THE LONG SCRIPT AND BEGIN AGAIN).

(IF DOC HAS SURVEY, AND CAN'T SPEAK TO THE DOC)

What do you suggest would be the **best way to remind** the doctor of the survey? Would it be best to leave a written message, or a voicemail, or even a FAX?

[IF FAX, OBTAIN FAX NUMBER, ENTER INFORMATION IN THE SYSTEM, AND CODE CALL AS "NEEDS SUPERVISOR ATTENTION"].

[IF MESSAGE, GO TO VOICEMAIL SCRIPT].
Thank you so much for your patience and your assistance.

[IF R SAYS DOCTOR DOESN'T DO SURVEYS]
The findings of this study are likely to influence policies directly affecting (his/her) practice. Even if s/he doesn't usually complete surveys, s/he might want to participate in this one. May I speak to (him/her) directly?

Send Another Package

[IF R SAYS SEND ANOTHER OR DOESN'T KNOW IF DOC HAS IT]

OK, let me send a package out tonight. [VERIFY ADDRESS]. Would you **be willing to look for** the Priority Mail package and make sure it's on (his/her) desk? I know that doctors are busy and I'm **afraid that the package will get lost in the shuffle**. Could you also let Dr. [INSERT DR'S NAME] know that (his/her) response is very important to us?

[ENTER NEW ADDRESS IF NECESSARY AND CODE AS "REMAIL"]

DOCTOR SCRIPT

[IF TRANSFERRED to DOCTOR or DOCTOR ANSWERS]
Hello Dr. [INSERT DR'S NAME], my name is [INTERVIEWER'S NAME], and I'm calling regarding a national physicians' survey sponsored by The National Cancer Institute about the care you provide to cancer survivors who have completed active treatment for their disease sent on (DAY/DATE). I know you are very busy but wanted to find out if you have had the chance to fill it out yet?

[IF DOCTOR DOES NOT PROVIDE PRIMARY CARE]
Thank you for that important information.
What kind of specialty services do you provide?
[RECORD SPECIALTY IN NOTES AND CODE AS NEEDS SUPERVISOR ATTENTION].

You have been very helpful. **Thank you** so much. Given that you do not provide primary care, it doesn't make sense for you to fill out the survey.

[IF YES, FILLED OUT]
Great! Do you know the date that you sent it so we know **when** to expect it in the mail?

[IF NO, NOT FILLED OUT]

This survey is part of an important study being conducted on behalf of The National Cancer Institute. Study findings are very likely to influence the practice of medicine. It is vital to the study that we receive information from physicians such as you. I know **it's hard to find time** to fill out this document. But, if you can take about 20 minutes to complete the questionnaire, it would help us tremendously. Do you have any sense of **when** you might fill out the survey?

[IF WILLING TO FILL IT OUT].

Thank you so much for your time. We look forward to receiving your response. [SET CALL STATUS TO "WILL COMPLETE," SET DATE TO CALL BACK FOR 10 DAYS AFTER DATE OF MAILING. ADD INFORMATION TO NOTES],

[IF NO OR NOT SURE]

I understand your time is valuable. If you have any questions or if you would like to complete the survey by phone please contact us at **1-888-XXX-XXXX**. [CODE AS REFUSAL, FILL OUT NRF].

[IF S/HE HAVE NOT SEEN IT OR RECEIVED IT]

May I send you another survey?

[IF YES] OK, let me send one out tonight. [VERIFY ADDRESS].

[IF NO]

Your participation is very valuable to us. I could set up a time that is convenient for you to take the survey over the telephone if you prefer.

[IF STILL NO, CODE AS REFUSAL AND FILL OUT NRF. IF YOU ARE ABLE TO SCHEDULE A TELEPHONE INTERVIEW, LET THE FLOOR SUPERVISOR KNOW IMMEDIATELY, ENTER NOTES, AND CODE THE CASE "NEEDS SUPERVISOR ATTENTION"].

REQUEST FOR REPLACEMENT CHECK

[IF THE PHYSICIAN WANTS A REPLACEMENT CHECK]:

Sure, we'd be happy to send you another check, and I'll get that process started now. It should be there in about five days.

[IF NEEDED] When do you expect that you will be able to complete and mail the survey? [RECORD DATE IN NOTES]. Thanks so much. We look forward to receiving that information.

[CODE FOLLOWUP STATUS AS **CHECK ONLY NEEDED**].

TRANSFERRED TO VOICEMAIL (LAST RESORT)

VOICEMAIL SCRIPT

Hello, my name is [INTERVIEWER'S NAME] and I am calling on behalf of The National Cancer Institute.

I'm following up on a package we last sent on (DATE). The package contained an important survey on the care you provide to cancer survivors who have completed active treatment for their disease. Your input is vital to the study, so we would greatly appreciate your completing and returning the survey soon if at all possible.

If you need another survey, you have a question, or if you would like to answer the survey questions by telephone, please give us a call at **1-888-XXX-XXXX**.

If you are not providing primary care at this time, please leave us a message with your name and current specialty, and we won't bother you again. Thank you for your help with this.