

Attachment 8. Contact and Recruitment Procedures and Scripts

NIC Contact and Recruitment Procedures and Scripts

There are two ways in which NIC staff may come into contact with potential participants: 1) NIC staff will attempt to contact persons selected for participation in NIC, with the permission of the health care provider who diagnosed their HIV infection, if required, to recruit them to participate; or 2) Self-referral or referral by peers or partner agencies: NIC staff will speak potential participants who call the dedicated project phone line after being referred by peers who have already participated in NIC. (The participants who recruit others will not be asked to refer specific individuals but rather will decide themselves whom to refer based on the NIC eligibility criteria. Referred persons who call NIC study staff will only be recruited if they are on the list of those selected to participate.) Both direct contact and contact through peer referrals are covered in this document.

Direct Contact

. For direct contact, information will be obtained from the facility of diagnosis and/or Health Department contacts (such as through partner counseling and referral services). A physical description and/or information about the person's receptiveness to being contacted by the Health Department (from previous contacts) may be available in Health Department records, and will be useful for approaching people for participation in NIC. NIC staff members should be aware that when contacting potential participants, maintaining confidentiality is essential. The NIC Project Coordinator should review, on a weekly basis, attempts by NIC staff to contact potential participants. Only persons who have been notified of their positive HIV status should be contacted. If there is any doubt that a person has been notified, the interview should be arranged at a Health Department facility where post-test counseling services are available. NIC staff should be prepared to provide linkage to post-test counseling should they contact a potential participant who turns out not to have been notified of his/her HIV status. The NIC staff member should offer to go with the person contacted to post-test counseling.

A. Contacting Potential Participants for Whom a Telephone Number is Available

If possible, the NIC staff should first attempt to contact the potential participant by telephone,.

1) Contacting the Potential Respondent Directly

To avoid breaching confidentiality, the words "HIV" and "AIDS" must never be spoken during the telephone conversation.

The initial call allows the NIC staff member to identify him/herself, to discreetly establish the nature of the call, and to arrange an appointment for an interview.

Below is an example of a recruitment call:

(NS=NIC Staff Member)

NS: *Hello, may I speak with John Doe?*

If asked "Who is calling?" respond that you are conducting a survey about health care. If the

respondent indicates he is John Doe, or John Doe comes to the phone, say:

NS: *I am calling about something for John Doe, and I need to make sure that I am talking to the right person (keep in mind that there could be a Jr and Sr with the same name.) In what year were you born?*

If the year of birth matches that of the person you are seeking, this represents preliminary evidence that you have reached the correct person. Say:

NS: *My name is Mike Smith and I am from the XXX Health Services. You've been selected to help us assess how people are able or not able to get medical care by participating in a survey. This assessment is important and I will pay you for your time. I also have some important information to share with you about health care services. If you agree to participate, you'd be helping your community learn more about gaps in health care services (AND you'd earn something for your time). Because the information I need to speak with you about is personal, I would like to meet you in person to ask you some questions and give you some important information about health care services. Everything we would talk about would be confidential.*

NS: *The whole visit would take less than 1 hour [1.5 hours for selected participants in Indiana and Washington].*

NS: *When can we meet?*

NS: *Would you be able to meet me at [suggest a place] where we can speak privately? [If another place is suggested, say:*

Would that place be OK for a private conversation?

If the he/she agrees to a meeting, ask him/her to bring some personal identification.

If the year of birth does not match that of the person you are seeking to interview, say:

NS: *My name is Mike Smith and I am from XXX Health Services. John Doe was chosen to take part in a health survey and I need to make sure I am speaking to the right person. The year of birth I have for John Doe is different, what's your name?*

If the person confirms that he is John Doe, emphasize the importance of a face-to-face meeting to confirm one another's identity and to conduct the interview, and ask him if he is willing to meet. Say:

NS: *Because the information I need to speak with you about is personal, I would like to meet you in person to ask you some*

questions face-to-face and to give you some important information about health care services. Everything we would talk about would be confidential. The whole visit would take less than 1 hour **[1.5 hours for selected participants in Indiana and Washington]**.

NS: *When can we meet?*

NS: *Would you be able to meet me at [suggest a place] where we can speak privately?" If another place is suggested, say:*

Would that place be OK for a private conversation?

If he/she agrees to the meeting, ask him/her to bring personal identification.

The potential participant may demand additional information before he/she agrees to a meeting. NIC staff may remind the person of the monetary incentive and promise to provide information about health care services to motivate him/her to make an appointment. NIC staff may also use the statement:

NS: *I have information about health care for you that I think you will want. When would be a good time to meet?*

If transportation is an issue, offer to travel to meet the person at a place of his/her choosing [as long as it meets the auditory privacy conditions necessary for an interview].

If the person says he is not John Doe, say:

NS: *"I need to talk with John-- where is he right now? What number can I reach him at?" [If no other number, say:]*

NS: *What other way can I reach him now? (cell phone, work location, lunch place, regular hangout, pager, email)?*

2) Communicating with a Third Party Over the Telephone

a) Third Party at Home

Telephone calls to the home of the potential respondent can be challenging, particularly when a related third party answers the call. Precautions must be taken to protect confidentiality.

Conversations with someone other than the person eligible for NIC should be brief, and the information presented in a matter-of-fact fashion.

Example Telephone Conversation

TP = Third Party

NS= NIC Staff Member

TP: *Hello*

NS: *Hello, may I speak with John?*

TP: *John isn't here, Who is this?*

NS: *This is Bill. When will John be home?*

TP: *After nine. May I help you? What is this about?*

NS: *John's been selected to participate in a survey. He will be paid for his time. Here is my number—do you have a pen? The number is XXX-XXX-XXXX. He can call collect if he likes. **(Make sure that those who answer this phone number don't say the words "HIV/AIDS" or "Health Department" and that the voicemail message and caller ID for the phone number do not indicate it is a phone line for an HIV/AIDS-related program. It may also be necessary to give a time for John to call back when the staff member will be in the office, or a cell phone number).***

NS: *What other way can I reach John now, such as a cell phone number, different work location, lunch place, regular hangout, pager, email?*

TP: *Yes, John's cell phone number is XXX-XXX-XXXX.*

NS: *Thank you.*

b) Third Party at Work

Encountering a third party when calling the workplace is an extremely sensitive and delicate situation. The NIC staff member must attempt to make contact with the potential participant without arousing suspicion or bringing unnecessary attention either to him/herself or to the potential respondent. The best approach in this situation is to ask to speak to the potential respondent while simply identifying yourself by name. If the person asks about the purpose of the call, politely but assertively state that you need John's help. If the potential respondent is unavailable, try to ascertain a time that would be appropriate to make contact and leave your name and telephone number to have the person call you back.

Example Telephone Conversation

TP = Third Party

NS= NIC Staff Member

NS: *Hello, may I speak with John Doe?*

TP: John is not able to receive calls at this time. Can I take a message?

NS: Yes, I would like to leave my name and number. My name is Mike Smith. I can be reached at XXX-XXX-XXXX. He can call collect if he likes. **(It may also be necessary to give a time for John to call back when the staff member will be in the office, or a cell phone number).** When will he get this message?

TP: He takes his break at 3:00 PM. He will be able to get his message then.

NS: What other way can I reach him now (such as a cell phone number, different work location, lunch place, hangout, pager, email...)?

TP: I don't have another number for John.

NS: I will call back at 3 PM, then. Thank you.

A. Contacting a Potential Respondent Without a Telephone Number

a) Contact by Email

If the only information you have for a person is an email address, you may send an email using the following format.

Example Email #1:

My name is Mike Smith, and I am a working with the XXX health services. You've been selected to help us assess how people are able or not able to get medical care by participating in a survey. This assessment is important and I will pay you for your time I also have some important information to share with you about health care services. If you agree to participate, you'd be helping your community learn more about possible gaps in health care services (AND you'd earn something for your time). You can call me at XXX-XXX-XXXX (call collect if you wish), Monday through Friday, 8am to 5pm or XXX-XXX-XXXX (cell). If I am not available, you can leave your name and number on this CONFIDENTIAL line and I or person on the staff will return your call as soon as possible. This is NOT spam!

Thank you for your cooperation.

Mike Smith, public health advisor

XXX Health Services

XXX-XXX-XXXX

Example email #2-

Hello, my name is Mike Smith, and I'm working with XXX Health Services. This is the second time I've tried to contact you, I last sent an email on XX/XX/XX. Please call me as soon as possible. You've

been selected to help us assess assess how people are able or not able to get medical care by participating in a survey. This assessment is important and I will pay you for your time. I also have some important information to share with you about health care services. If you agree to participate, you'd be helping your community learn more about possible gaps in health care services (AND you'd earn something for your time). My only means of contacting you is through this email address. You can call me at XXX-XXX-XXXX (call collect if you wish), Monday through Friday, 8am to 5pm or XXX-XXX-XXXX (cell). If I am not available, you can leave your number on this CONFIDENTIAL line and either I or another person on the staff will return your call as soon as possible."

Mike Smith, public health advisor

XXX Health Services

XXX-XXX-XXXX

Example email #3-

My name is Mike Smith and I'm working with the XXX Health Services. This is the third time I have tried to contact you regarding your participation in a survey to assess gaps in medical care needs. This assessment is important and I will pay you for your time I also have some important information to share with you about health care services. If you agree to participate, you'd be helping your community learn more about possible gaps in health care services (AND you'd earn something for your time). Please call me as soon as possible at XXX-XXX-XXXX (call collect if you wish), Monday through Friday, 8am to 5pm or XXX-XXX-XXXX (cell). If I am not available, you can leave your number on this CONFIDENTIAL line and either I or another member of the staff will return your call as soon as possible. To assist you in confirming my identity, I'm also including the name and phone number of my supervisor, George Hill XXX-XXX-XXXX.

Please do not delay in contacting one of us. Thank you.

Mike Smith, public health advisor

XXX Health Services

XXX-XXX-XXXX

George Hill, supervisor

XXX Health Services

XXX-XXX-XXXX

If no response to email is received, and a street address is available,

NIC staff should attempt a visit to reach the person.

If a telephone number or email address is unavailable, the NIC staff member will try to obtain one. If still unable to obtain a telephone number or email address, but there is a street address for the potential respondent, the NIC staff member will send a letter.

b) Contact by Mailed Letter

The envelope should contain no street address (a post office box number is okay) and should be marked:

- Potential respondent's name and address
- To be opened by addressee only; and
- Confidential.

Example Letter

Dear John Doe,

You've been selected to help us assess gaps in medical care needs by participating in a survey. This assessment is important and I will pay you for your time. I also have some important information to share with you about health care services. If you agree to participate, you'd be helping your community learn more about possible gaps in health care services (AND you'd earn something for your time). Please call me, Mike Smith, a public health advisor at the XXX Health Services, as soon as possible. You can call me at XXX-XXX-XXXX (call collect if you wish), Monday through Friday, 8am to 5pm or XXX-XXX-XXXX (cell). If I am not available, you can leave your name and number on this CONFIDENTIAL line and I or another public health advisor will return your call as soon as possible.

Thank you for your cooperation.

Mike Smith, public health advisor

XXX Health Services

XXX-XXX-XXXX

If the potential respondent doesn't call within one week, NIC staff should make a field visit.

c) Making a Field Visit

To recruit a person eligible for NIC without a telephone number or email address, or if the person does not respond to telephone or email messages or mailed letters, can be time consuming since the NIC staff member does not have the option of scheduling appointments in advance. Several field visits (at different times of day/evening and days of the week) may be necessary before the NIC staff member has the opportunity to reach and meet with the potential respondent.

i) Leaving a Note When the Potential Respondent is Not Available

It is important that a blank sealed envelope, containing the NIC staff member's contact information, be prepared prior to conducting the field visit, in case the person sought is not available. The outside of the envelope must be addressed in the following manner:

- Potential respondent's name and address;
- To be opened by addressee only; and
- Confidential.

The note inside will state that the person has been selected to participate in a health survey to assess how people are able or not able to get medical care, to be paid for participating, and to receive important information about health care services. The note will also request that the addressee contact the NIC staff member. When the potential respondent is not available, the NIC staff member will leave this note at the person's address or with a third party. If the potential respondent doesn't call within one week, NIC staff should make another field visit. If this visit does not result in contact with the potential respondent, the next step should be discussed with the NIC Project Coordinator.

ii) Encountering Third Parties During a Field Visit

Some people may be highly suspicious of any questions asked concerning how to locate someone. It is important that the NIC staff member be prepared for these suspicions in the event that he/she must interact with a third party. The most important technique in this situation is to use open-ended questions, i.e., a question worded in such a way that prevents a "yes" or "no" response and engages the third party to provide additional information. For example: The NIC staff member should ask: "When will Mary be available?" instead of, "Do you know when Mary will be available?"

The following are examples of approaches that should be used in communicating with third parties.

Example 1: Third Party at Work

TP = Third Party

NS= NIC Staff Member

NS: *Hello, I am here to see John Doe.*

TP: *John is not able to receive visits at this time. Can I help you?*

NS: *I have important information I would like to share with John and I need his assistance. Where is he today?*

TP = *Just a minute, I'll get him*

When you meet the respondent, verify identity and continue with the recruitment script (section C below).

OR

TP: *He isn't here.*

NS: *At what time can I see him?*

TP: *You can see him at 3 pm.*

NS: *What other way can I reach John now, such as a cell phone number, different work location, lunch place, pager, email?*

TP: *Your best bet is to catch him here at 3 pm.*

NS: *Ok, I will be back then. I'd also like to leave my number in case I miss him. Here is my number—do you have a pen? The number is XXX-XXX-XXXX (he can call collect if he wishes). **(It may also be necessary to give a time for John to call back when the staff member will be in the office, or a cell phone number).***

NS: *Thank you.*

IF TP says John is not available that day:

NS: *Here's a note for him... When can you give it to him?*

TP: *This afternoon at 3PM.*

NS: *Ok, I'll try and stop back then. Thank you for your assistance.*

OR

NS: *What's the best way to get him this message?*

TP: *I would suggest leaving it with his secretary.*

NS: *Thanks for your assistance.*

Example 2: Third Party at Home

If the person who answers the door matches the general description you have of the respondent (e.g., same age, race, sex), then you should greet the person by saying "John?" This open ended greeting facilitates the conversation with "John" if he comes to the door.

TP: *Hello*

NS: *John?*

TP: *John isn't here. Who are you and what is this about?*

NS: *I am Bill. When will John be home?*

TP: *He will be here after 9 pm. I am his father. How may I help you?*

NS: *Nice to meet you! John's been selected to participate in our survey—it should be interesting for him and he will be paid for his time. He'd also be helping to assess needs in this community*

NS: *What other way can I reach him now, such as by cell phone, pager, email, or at another location?*

NS: *He's down the street at the Starbuck's.*

TP: (If you don't have a physical description, ask for one.)
Thanks for your assistance.

OR

If a number is given, write it down, thank the person and say that you will be calling John OR if no other number, explain that you will call back after 9 pm, and then say:

NS: *When can you give him this note? It will help explain the survey.*

TP: [Sees outside of envelope with "confidential" stamp.]

But I am his mother, I have the right to know what this is about.

NS: *I understand, and I don't like being mysterious but there are guidelines I have to follow as part of doing this survey He is the one that I must speak with first. John is not in any trouble—just the opposite. I need his help*

TP: *I will give the envelope to John tonight.*

NS: *Thank you for your assistance and understanding.*

C. Meeting Face-to-Face

Confirming the Potential participant's Identity

During a face-to-face meeting, the NIC staff member confirms the identity of the potential respondent. If the physical description and date of birth match with the information the NIC staff member has, proceed to recruitment using the script below. If the physical description and or other identifying information available do not match that of the potential respondent, request a driver's license or other identifying documentation. In the event that no identification can be provided, the NIC staff member will reschedule the field visit to a time that the potential respondent can produce proper identification. In the meantime, NIC staff should also attempt to verify the physical description.

Recruitment

NS: *Hello, my name is Mike Smith and I'm working with XXX health services. (Show the individual your work identification). You've been selected to help us assess how people are able or not able to get medical care by participating in a survey. This assessment is important and I will pay you for your time. I also have some important information to share with you about health care services. If you agree to*

participate, you'd be helping your community learn more about gaps in health care services (AND you'd earn something for your time). How old are you? Where do you live?

Respondent must be at least 18, live in the project area, and speak English or Spanish. If the person does not meet these eligibility criteria, terminate the interview by saying,

NS: *For this survey, we want to talk with people 18 or older who live in [project area) and speak English or Spanish. Thank you for your time."*

If the person is over 18 and meets the residence requirements, say,

NS: *I would like to tell you more about the survey so you can decide if you want to participate. Everything we talk about will remain confidential. Do you recall having had a medical test at [name of facility] or from [name of provider].*

If the person does not recall having been tested: give him/her some other information, such as the date the test was administered.

If the person remembers, then say:

NS: *I would like to talk to you about the medical test that you had—I'm referring to an HIV test.*

NS: *When did you receive the results of this HIV test?*

If respondent can't answer or says that he or she didn't receive the test, terminate the interview, and provide an immediate referral for post-test counseling. (Note: The interviewer should provide assistance with obtaining post-test counseling services and transportation, if necessary, and offer to accompany the person to the post-test counseling location).

If the person doesn't remember the test even after the date is given: terminate the interview and provide a referral for post-test counseling. (Note: The interviewer should provide assistance with obtaining post-test counseling services and transportation, if necessary, and offer to accompany the person to the post-test counseling location.)

If the person remembers the test: confirm that he/she received the test results, then say :

NS: *The health department has selected you to be confidentially interviewed because our records indicate that you have HIV infection but may not have received medical care for your HIV infection. Before I go on, I would like to check on whether this is correct. Have you received medical care for*

your HIV infection?

IF YES: Ask where and when, document this information, terminate the interview and thank the person for their time.

If the person confirms he/she has not received care, say,

NS: *The health department is trying to learn how to help people with HIV infection get medical care. I'm going to read you a description of what is involved in participating in this survey." Ready to get started? **If yes, read consent....***

If consent is not given: Terminate the interview, thank the person for their time, and provide referrals for HIV-related medical and other services.

Contact Through Referral

Each person who agrees to participate in NIC (with the exception of prisoners) will be asked at the end of the interview to share information about the NIC Project with others whom they know who are HIV-infected and have never been in care. Specifically, they will be asked to give the flyer below to others whom they believe to be eligible to participate in the Project. Partner agencies (e.g., community-based agencies offering HIV-related services, substance abuse counseling and treatment agencies, case-management services) will also be asked to refer eligible persons to the NIC project. Finally, flyers will be posted in suitable locations, which may generate self-referrals.

Help [name of health department] Help the Community and Receive \$\$\$ for Your Time

You may be eligible to participate in an interview and receive \$25-\$75 for your time. The [] health department wants to know how it can better serve the community in [geographic area]. The health department is specifically interested in what it can do to improve HIV services and make them more available. Please call if:

- ◆ You found out your HIV status at least 3 months ago
- ◆ Besides getting an HIV test, you have never been to a doctor, nurse, or other health care worker for HIV care
- ◆ You are 18 years of age or older
- ◆ You speak English or Spanish

If interested call: [phone number].

When you call, you will be asked some questions to determine if you are eligible to take part in the Project. Some eligible people may not be selected. If selected, you will be asked to meet a Project staff member in person. Your responses to interview questions will be kept strictly confidential.

[] Health Department
[address, phone number]

When an individual who has been referred (or self-referred) calls the NIC Project dedicated phone line, the NIC staff member will identify the reason for the call and then say:

Name of Health Department] has started a project in your area to learn about why some people who have HIV infection don't get HIV medical care, what they need to get care, and what can be done to meet these needs. The Health Department is interviewing people in your community for this project. The interview is completely confidential and those who take part will not be contacted again after it takes place. The interview contains some questions that may be uncomfortable for some people. No one will be pushed to answer questions that they don't want to answer.

How did you hear about the project / get this phone number?

- Flyer posted on a wall
- Flyer given by a friend
- Partner Agency
- NIC Staff Member

Then the staff member will say:

I would like to ask you some questions to see if you are eligible to take part in the Project. If you are eligible, then I will set up an appointment to meet you in person for the interview. I will ask you to bring personal identification to the meeting so I can be sure I am talking to the right person.

The caller will be asked his or her name and birth date, so it can be checked against the list of those selected for participation.

What is your name? _____

What is your date of birth? _____

Even if the caller **is not** on the list of persons selected to participate, ask the questions below:

1. Are you 18 years old or older? [also check available records]

Yes1.....[CONTINUE to 2.]

No.....2.....[Say: "For this project, we are interested in talking with people who are 18 years old or older." THANK AND ASSIST WITH ACCESSING MEDICAL CARE / SOCIAL SERVICES]

Closing Script:

I would like to answer any questions you may have and help you get any medical and social services that you may need. Do you have any questions? Do you need

help getting medical or dental services, mental health counseling, drug or alcohol abuse counseling, peer counseling or support, financial counseling or benefits assistance, shelter or housing services, meal or food services, home health services, or education or information about HIV?

If yes, provide information and/or referral to a case manager.

Thank you very much for calling today and for your interest in our project. Goodbye.

2. Did you have your first positive test for HIV at least 3 months ago? [also check available records]

- Yes1.....[CONTINUE to 3.]
- No.....2.....[Say: "For this project we are interested in talking with people who had their first positive HIV test at least 3 months ago." THANK AND ASSIST WITH ACCESSING NEEDED MEDICAL CARE / SOCIAL SERVICES]

Closing Script:

I would like to answer any questions you may have and help you get any medical and social services that you may need. Do you have any questions? Do you need help getting medical or dental services, mental health counseling, drug or alcohol abuse counseling, peer counseling or support, financial counseling or benefits assistance, shelter or housing services, meal or food services, home health services, or education or information about HIV?

If yes, provide information and/or referral to a case manager.

Thank you very much for calling today and for your interest in our project. Goodbye.

3. Have you ever received HIV medical care (by "HIV medical care" I mean physical exams and laboratory tests such as HIV viral load and CD4 testing that can tell your doctor how fast the virus is multiplying and how your body is fighting the virus.)

- Yes1.....[Say: "For this project we are interested in talking with people who have never received medical care for their HIV infection." THANK AND ASSIST WITH ACCESSING NEEDED SERVICES]
- No.....2.....[CONTINUE to 4.]

Closing Script:

I would like to answer any questions you may have and help you get any medical and social services that you may need. Do you have any questions? Do you need help getting medical or dental services, mental health counseling, drug or alcohol abuse counseling, peer counseling or support, financial counseling or benefits assistance, shelter or housing services, meal or food services, home health services, or education or information about HIV?

If yes, provide information and/or referral to a case manager.

Thank you very much for calling today and for your interest in our project. Goodbye.

4. You have not been selected to take part in the project at this time; however, you may be selected in the future. Would it be Ok to contact you if you are selected?

Yes1.....[COLLECT CONTACT INFORMATION USING FORM BELOW, THEN THANK AND ASSIST WITH ACCESSING MEDICAL CARE/SOCIAL SERVICES]

No.....2.....[THANK AND ASSIST WITH ACCESSING MEDICAL CARE / SOCIAL SERVICES]

Closing Script:

I would like to answer any questions you may have and help you get any medical and social services that you may need. Do you have any questions? Do you need help getting medical or dental services, mental health counseling, drug or alcohol abuse counseling, peer counseling or support, financial counseling or benefits assistance, shelter or housing services, meal or food services, home health services, or education or information about HIV?

If yes, provide information and/or referral to a case manager.

Thank you very much for calling today and for your interest in our project. Goodbye.

If the caller *is* on the list of persons selected to participate, ask the screening questions below.

II. Screening Questions & Permission to Contact

Are you 18 years old or older? [also check available records]

Yes1.....[CONTINUE].....
No.....2.....[THANK.AND.ASSIST WITH
ACCESSING MEDICAL CARE /
SOCIAL SERVICES]

Did you have your first positive test for HIV at least 3 months ago? [also check available records]

Yes1.....[CONTINUE].....
No.....2.....[THANK.AND.ASSIST WITH
ACCESSING NEEDED
MEDICAL CARE / SOCIAL
SERVICES]

Have you ever received HIV medical care (by "HIV medical care" I mean physical exams and laboratory tests such as HIV viral load and CD4 testing that can tell your doctor how fast the virus is multiplying and how your body is fighting the virus.)

Yes1.....[THANK.AND.ASSIST WITH
ACCESSING NEEDED
SERVICES]
No.....2.....[CONTINUE].....

If you decide to participate, we will need to set up an appointment to meet you in person for the interview, and we will ask you to bring personal identification with you, such as a driver's license or other ID card with a photograph on it. If you take part in the project you will be given \$25-\$50 (or \$25-75). You will receive \$25 for a 30 minute interview [for those selected for the qualitative interview say:and another \$25 if you agree to second interview, which would last an hour], plus \$25 if you give a some drops of blood from your finger.

Are you interested in participating?

Yes1.....Great! [CONTINUE].
No.....2.....[THANK.AND.ASSIST WITH
ACCESSING NEEDED
MEDICAL CARE / SOCIAL
SERVICES]

To interview you, I will need to set up an appointment to meet you in person. When are you available to meet? [make appointment]

Where shall we meet? [SET LOCATION]

Confirm date and location.

Do you want a reminder?

Yes1.....[CONTINUE].....

No.....2.....[THANK AND ASSIST WITH
ACCESSING NEEDED
MEDICAL CARE/ SOCIAL
SERVICES]

Please remember to bring official identification (including a photo) with you to the appointment.

STEP 1. Collecting Contact Information

- Potential participants who want to be reminded of the interview appointment should be asked to give as much contact information as they feel comfortable giving (on a voluntary basis) so that NIC study staff can reach them to confirm their participation and remind them of the date, time and location of their appointment to be interviewed. Participants should be reminded that this information will not be kept with or recorded on any other study materials (consent form or responses to interview) and that the information will be destroyed once the interview has taken place or one year after their call, whichever comes first.
- Participants may decline to provide any or all information requested on the contact information form. They may also choose to share information but with specific stipulations that should be honored by study staff and should be recorded on the contact information sheet (e.g. only call at night, don't use the study name when calling, only talk to participant, don't leave messages.) If a participant refuses to provide any contact information, record this on the Contact Information Form and be sure to give them the details on the interview and encourage them to show up to participate.
- Every effort should be made to obtain a phone number for contact since this method will be the most useful for reaching participants.
- Give the contact information to the NIC study staff, following their instructions for protection of sensitive data.

STEP 2.

- Explain to the participant that if a NIC staff member calls, he or she will ask for a password which will help to assure that they are actually speaking with them and not someone posing as them. Ask the participant to choose a password that is easily remembered and that no one else will think of.

III. Contact Information Form

The staff of the Never In Care Project need some way of contacting you to confirm your participation in the interview. I am going to ask you now to give me your name, address and phone number, or the name, address and phone number of a person or persons who would know how to reach you to remind you of your appointment. You should know that with your permission now, we will be using this information to contact you and if we are unable to get in contact with you we may contact the people you tell us about on this form. If we do contact the other people on this form, we won't tell them why we are calling. We will only say that we need to speak with you and leave our phone number. The information you give us now will not be kept with or written on any record of your answers to interview questions.

This form will be destroyed the day of the interview or one year after their call, whichever comes first. You can decide not to give us any of this information and this will not change your invitation to participate in the interview.

Date of Call: _____ Interviewer ID: _____

Name _____

Nickname _____

Date of Birth _____

Address _____ OK to mail? ___Yes ___No
Street _____
Apt number, c/o _____
City State Zip _____

Telephone (____) _____(h) OK to call? ___Yes ___No
(____) _____(w) OK to call? ___Yes ___No
(____) _____(c) OK to call? ___Yes ___No

Pager _____ OK to page? ___Yes ___No

Email _____@_____ OK to Email? ___Yes ___No

Other specific contact instructions: _____

Contact # 1 (Person you have known for more than one year and whom you are in steady contact with)

Name _____ Relationship _____

Telephone _____(h) OK to call? ___Yes ___No

_____ (w) OK to call? ___Yes ___No

_____ (c) OK to call? ___Yes ___No

Pager _____ OK to page? ___Yes ___No

Email _____@_____ OK to Email? ___Yes ___No

Other specific contact instructions: _____

Contact # 2 (Person you have known for more than one year and whom you are in steady contact with)

Name _____ Relationship _____

Telephone _____(h) OK to call? ___Yes ___No

_____ (w) OK to call? ___Yes ___No

_____ (c) OK to call? ___Yes ___No

Pager _____
Email _____@_____

OK to page? ___Yes ___
OK to Email? ___Yes ___No

Other specific contact instructions: _____

Closing Script:

I would like to answer any questions you may have and help you get any medical and social services that you may need. Do you have any questions? Do you need help getting medical or dental services, mental health counseling, drug or alcohol abuse counseling, peer counseling or support, financial counseling or benefits assistance, shelter or housing services, meal or food services, home health services, or education or information about HIV?

If yes, provide information and/or referral to a case manager.

Thank you very much for calling today and for your interest in our project. Goodbye.

Or if a meeting has been arranged, say:

Thank you for agreeing to take part in our project and we look forward to talking with you on [date, time] at [location]

[Follow guidelines for meeting potential participants, specifically, the section beginning on page 257, "Meeting Face to Face."]