

## Attachment 13b

### Model MMP Telephone Interview Recruitment Scripts MMP Telephone Interview Recruitment Procedures and Sample Scripts MMP Staff Make Initial Contact

Please note that this sample script is provided as an example. This document should be modified to meet your local needs. In many cases facility staff may be the ones approaching patients first about MMP, and certain information in the scripts below may be conveyed by them at that time.

#### **Participant Identification**

MMP staff making the initial contact with potential participants should follow their project area standard procedures when contacting potential participants and explaining MMP. MMP staff making the initial contact via the telephone should be aware that maintaining confidentiality is essential. Mention of HIV/AIDS should not occur until the participant's identity can be confirmed.

Before providing a thorough explanation of MMP, staff will need to verify the potential participant's identity. To confirm a participant's identity over the phone, MMP staff members should obtain the following information from the clinic prior to calling the participant. When the participant is contacted, he/she will be required to provide the matching information. (Sample script below)

1. What is your full name (including middle name and/or suffix)?
2. What is your date of birth?
3. Do you have a regular place or person that you go to for medical care? If yes, what is the name of that place or person?

If the person is able to answer these questions correctly, the interviewer may move on to the recruitment portion of the interview. **If the person cannot answer these questions correctly, the interviewer should schedule a face-to-face interview so that the participant's identity can be confirmed in person.** If facility staff are the first to approach patients about MMP, project areas may choose to ask staff to give the patient a code number or word at that time. This code can be later used to confirm the person's identity in place of the three questions.

#### **Sample Script**

MMP Staff: *Hello, may I speak with John Doe?*

MMP Staff:

If asked "Who is calling?" respond that you are conducting a health survey. If a letter introducing the survey has been sent in advance then it may be mentioned at this time. If the person indicates that he is John Doe or John Doe comes to the phone,

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**mind that there could be a Jr. and Sr. with the same name.)** *Can I ask you a few questions to make sure I'm speaking with the right John Do?*

If yes, continue.  
If no, \_\_\_\_\_

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MMP Staff: *What is your full name including your middle name?*

Participant: *John Alexander Doe.*

MMP Staff: *Great! May I ask your date of birth?*

Participant: *February, 10<sup>th</sup>, 1974.*

MMP Staff: *Excellent! Just one more question to make sure I'm talking to the right person. Do you have a regular place you go for medical care? If so, what is the name of that place?*

Participant: *The Emory Clinic on Clifton Road.*

MMP Staff: *Thank you, Mr. Doe.*

- If answers correct, continue.
- If not correct, interviewers should try to schedule a face-to-face interview

## **Recruitment**

MMP Staff: *Hi, my name is \_\_\_\_\_ and I'm calling to see if you would be interested in participating in the Medical Monitoring Project, or MMP, a national project funded by the Centers for Disease Control and Prevention and conducted by the (Health Department). You and \_\_\_\_\_ (X number) of other participants were randomly chosen from local health care facilities to participate. We are collecting information to help target prevention efforts and improve services for people with your specific health care needs. If you choose to participate, you will provide informed consent and then complete a one-time 45-minute interview and your medical record will be reviewed. You will be given \$XX.00 as a token of appreciation.*

*This project is completely confidential. Neither your name nor your medical record number will appear on any project documents.*

*Would you be interested in participating?*

➤ **If YES:**

## **❖ Scenario 1: Telephone Interview Selected**

MMP Staff: *Great! I'd like to offer you the opportunity to complete the interview either over the phone or in person. Please keep in mind that the interview may take up to 45 minutes and may cover sensitive information. If you choose*

*to complete the interview over the phone, you'll need to have a phone and a private space that you can use for the time it takes to complete the interview. Would you like to complete the interview by phone or in person?*

Participant: *Well, I work during the day. Could we do it over the phone after work?*

MMP Staff: *Yes, that's no problem. Like I said, some of the questions can be sensitive in nature. Will you have a private place to do the interview?*

Participant: *Yes, at my sister's house.*

MMP Staff: *Do you have a landline or a cell phone?*

Participant: *I'll use my cell phone.*

MMP Staff: *Okay. The interview will take 45 minutes to complete and we won't be able to reimburse you specifically for the cell phone minutes used. We will only be able to provide you with \$\_\_\_ as a token of appreciation. Is that okay?*

Participant: *Yes, I have unlimited minutes.*

**Interviewer can proceed to schedule the telephone interview.**

### **❖ Scenario 2: Telephone Interview Selected: On the Spot**

Participant: *Can I take the interview right now?*

MMP Staff: *During the interview, there are some questions that have multiple choices or options to choose more than one answer, and seeing the answers in front of you may help you pick the best one. Also, some questions ask about specific dates, so it is helpful to have a calendar available. To complete the interview, you will need to have a set of response cards that list the choices for these questions and include a calendar. If you want to complete the interview right now, I can help you get the response cards off the internet. Do you have internet access right now?*

Participant: *Yes.\**

*\*MMP staff will direct the respondent to their local website to retrieve the response cards.*

➤ **IF NO:**

MMP Staff: *Okay. It's really important that you have the response cards with you when taking the interview. Let's schedule the interview for a few days from now. That will give me a chance to mail the cards out to you. The cards will have HIV-related information on them. Is it okay to send them to you through the mail?*

➤ **IF NO:** MMP staff should then follow protocol currently used to set up face-to-face interviews.

### **➤ Scenario 3: In-person Interview Selected**

MMP Staff: *Great! I'd like to offer you the opportunity to complete the interview either over the phone or in person. Please keep in mind that the interview may take up to 45 minutes and may cover sensitive information. If you choose*

*to complete the interview over the phone, you'll need to have a phone and a private space that you can use for the time it takes to complete the interview. Would you like to complete the interview by phone or in person?*

Participant: *I'd rather do it in person.*

**Interviewer should continue with regular MMP recruitment.**

## **Obtaining Informed Consent**

Verbal or written consent for participation must be obtained before conducting the interview. To obtain verbal consent, interviewers must read the informed consent form to the participant. To obtain written consent, interviewers can either mail the consent form or obtain consent in person when recruiting at a clinic. If obtaining consent through the mail, interviewers should read the consent form to the participant again prior to starting the interview.

### **❖ Verbal Consent**

MMP Staff: *Before we begin the interview, I need to get your consent to participate. In order to do that, I have to read you what is called an "Informed Consent" form. After I have read the form and answered your questions, you will have the opportunity to agree to the interview or to decline the interview.*

*Do you have any questions?*

### **❖ Written Consent via Mail**

MMP Staff: *Before we can schedule the interview, I need to obtain a signed form saying that you agree to participate. I will mail you the form, called an Informed Consent form, and ask you to read it over. If at any time you have questions about the form, please call me. If you agree to sign the form and participate, you'll send it back to me in the self-addressed envelope that I will provide. After I receive your signed form, I will contact you to schedule your appointment. The consent form will have HIV related information on it. Is it okay to send it to you through the mail?*

➤ **IF NO:** MMP staff should then follow protocol currently used to set up face-to-face interviews.

### **❖ Written Consent in Person**

MMP staff members may obtain written consent if they recruit participants in person at the clinic. If this scenario occurs, please follow the same procedures regularly used for MMP.

## Response Cards

Participants should obtain the response cards prior to participating in the interview. MMP staff will either mail the response card set to the participant prior to the interview, provide the response cards to the participant in-person at the time of recruitment at the clinic, or the cards will be posted to local MMP external websites. As a last resort, performing the interview without response cards is preferable to not getting the interview at all.

### ❖ Mail

MMP Staff: *During the interview, there are some questions that have multiple choices or options to select more than one answer. I will mail you a set of response cards before the interview that list the possible answers to these questions to make it easier for you to choose your answer. The cards will have HIV-related information on them. Is it okay to send them to you through the mail?*

- **IF NO:** MMP staff should then follow protocol currently used to set up face-to-face interviews.

### ❖ In-Person

If MMP staff members recruit participants in-person, they should provide the response cards to the participant when scheduling the interview.

### ❖ Internet

If participants agree to complete the survey during the initial contact, MMP staff should direct the respondent to the local MMP external website or the CDC website, accessible at 4mmp.com, so they can retrieve the response cards. If the respondent cannot access the cards, the interview will have to be rescheduled for a later date.

## Incentives

Interviewers should explain how the participant will receive the token of appreciation for completing the interview.

### ❖ Mail

MMP Staff: *As I explained earlier, you will be given \$\_\_\_ as a token of appreciation today. The \$\_\_\_ will be in the form of a \_\_\_\_\_. We will send this out by mail, but will need you to sign for it so that we can be sure you received it. Can I verify your address?*

### ❖ Medical Facility

MMP Staff: *As I explained earlier, you will be given \$\_\_\_ as a token of appreciation. The \$\_\_\_ will be in the form of a \_\_\_\_\_. You will be able to pick it up at your doctor's office at your next visit. When you pick it up, you will be asked to sign a receipt so that we can confirm that you received it.*