

Appendix 8b

MMP Recruitment Script, Project Area Staff Make Initial Contact

Medical Monitoring Project

Recruitment Model Script and Guidance MMP Staff Make Initial Contact

This document provides model scripts and guidance for staff making initial contact with a respondent over the phone. To minimize the chance of an adverse event, MMP staff must confirm the sampled person's identity before mentioning HIV or MMP. Staff should be aware that they may contact someone who does not know their HIV status, therefore staff should be informed of national and local procedures on how to address this before starting recruitment. After confirmation of identity, if a sampled person meets eligibility requirements and agrees to participate, the project area may conduct an immediate telephone interview or schedule an interview.

Note to MMP Staff: To confirm a sampled person's identity over the phone, MMP staff members should obtain the following information prior to calling the sampled person. When the sampled person is contacted, s/he will be required to provide the matching information. Two or more methods of confirming identity should be used. Examples include:

- Full first, middle, and last name (including suffix, if available)
- Date of birth (month, day, and year)
- Medical facility used
- Phone number
- Current or past address
- Social Security Number

In addition, MMP staff should ascertain whether the sampled person is aware of his/her status by looking into eHARS or other supplementary sources of information. For example, a single report in eHARS with no subsequent visits to an HIV provider, and no additional CD4 or viral load tests may indicate that somebody may not be aware of their status.



STEP 1: Confirm **IDENTITY**

If you are recruiting on the phone and are unable to verify the person's identity, try to schedule a face-to-face meeting and request that s/he bring an ID.

Sample Script

MMP Staff: ***“Hi, may I speak to [first name of person]?”***

If the person is not available and someone else answers:

MMP Staff: ***“When would be a good time to call back? My name is [interviewer’s name]. Please have them call me back at [phone number].”***

If you reach their voicemail:

MMP Staff: ***“Hi, this is [interviewer’s name] from the [health department]. I’m trying to reach [person’s first name]. You were chosen to take part in a confidential health survey. If you decide to do it, you’ll get [token of appreciation]. Please give me a call at [your phone number]. Thank you.”***

If you reach the person:

MMP Staff: ***“Hi, my name is [interviewer’s name] and I am calling from the [health department]. We are conducting a confidential health survey and you were chosen to participate. If you decide to do it, you’ll get [token of appreciation]. I want to tell you a little more about this survey, but first, I need to make sure I’m talking to the right person.”***

To confirm respondent’s identity, you could ask:

- What is your full name (including middle name and/or suffix)?
- What is your date of birth?
- I see you were born in July, can you tell me the year?
- 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 (**Note:** only for persons whose care is confirmed by facility)?
- I have in my records another phone number for John Doe that begins with (404) 639. Can you tell me the last four digits of that phone number?
- I have in my records an old address for John Doe with the street number 1437. Can you tell me what street goes with that number?
- I have the first 3 digits of your SS# as 123, can you tell me the last 4 digits?
- Would you please show me an ID card or a driver’s license so that I can make sure I am speaking with the right person (**face-to-face recruitment only**)?

AGE

STEP 2: Confirm **AGE ≥ 18 on or prior to [sampling date]**

If the person is younger than 18, s/he is ineligible and should be dispositioned as “Ineligible - <18 on sampling date.”

MMP Staff: ***“How old were you on [sampling date]?”***

**STEP 3: Confirm RESIDENCE was in an MMP jurisdiction on [sampling date]****MMP Jurisdictions**

California	Georgia	Los Angeles	New York City	Pennsylvania	Texas
Chicago	Houston	Michigan	New York State	Philadelphia	Virginia
Delaware	Illinois	Mississippi	North Carolina	Puerto Rico	Washington
Florida	Indiana	New Jersey	Oregon	San Francisco	

If the person resided outside of an MMP jurisdiction on the sampling date, s/he is **ineligible** and should be dispositioned as “Ineligible – Resided in a non-MMP jurisdiction on sampling date” OR “Ineligible - Resided outside of US on sampling date,” whichever is more appropriate.

MMP Staff: **“Where were you living on [sampling date]?”**

**STEP 4: Confirm person was DIAGNOSED WITH HIV at any time on or prior to [sampling date]**

If the person is not aware of his/her status, but tested HIV-positive on or prior to the sampling date, the person may be eligible and should be provided counseling and linkage referrals and/or services per your health department’s standard protocol. **Under no circumstances** should the person be recruited until s/he has been informed of his/her status.

If the person does not have an HIV diagnosis on or prior to the sampling date, s/he is **ineligible** and should be dispositioned as “Ineligible - No HIV diagnosis prior to sampling date.”

MMP Staff: **“Were you HIV positive on [sampling]?”**

If sampled person says they were not HIV positive on the sampling date:

Note to MMP Staff: If sampled person says they are not HIV-positive, it is possible that they are mistaken, unaware of their status, or that the surveillance data are incorrect. Do not proceed with recruitment.

- Follow local procedures for delivering positive HIV test results, post-test counseling, and linking persons to confirmatory testing and HIV care. If the investigation concludes that the person is HIV positive, the focus should be linkage to HIV care.
- Report to your CDC project officer the fact that you have contacted a person unaware of his/her HIV status and consider whether the event meets the criteria for adverse event reporting.
- Provide contact information so that the person can contact MMP staff if s/he wants to participate at a later date.

If sampled person is not eligible for participation:

MMP Staff: ***“Unfortunately, based on your answers, we cannot move forward with the survey. But thank you for your time and I hope you have a great day.”***

If **ANY** of the four steps above are **NOT** met, **STOP AT THIS POINT.**

If **ALL STEPS ABOVE** are confirmed, then the person is **ELIGIBLE** and you may proceed to the steps below.

If sample person is eligible for participation:

MMP Staff: ***“Please tell me in what city and state are you currently living?”***

(**Note:** Confirm via ORP decision sheet that the respondent does not currently live in a jurisdiction that does not allow data collection)

If living in a jurisdiction that does not allow data collection:

MMP Staff: ***“Thank you for this information. Based on where you live, we cannot move forward with the survey. But thank you for your time.”***

If living in a jurisdiction that allows data collection:

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- STEP 5: **Introduce** MMP
- STEP 6: Confirm **interest** and **willingness** to participate
- STEP 7: **Schedule** the interview **OR begin the informed consent process** for an on-the-spot interview

MMP Staff: ***“Thank you for allowing me to check that you are the right person. Our health survey is called the Medical Monitoring Project or MMP. It asks about things like your medical care and your ability to take care of yourself. Everything you tell us will be kept confidential. Our plan is to speak with about [sample size] people across [project area] to better understand what people living with HIV need and how we can improve programs and services. For example, ...[Add 1***

sentence example of how data from MMP has been applied]... And for taking part, we will give you [token of appreciation]. Does this sound like something you would be interested in doing?"

If interested in participating in MMP:

MMP Staff: "Great! The survey will take about 40 minutes. Do you have time to complete the survey now over the phone?"

If they have time for an on-the-spot interview:

MMP Staff: "Do you have access to internet?"

(Note: If they have internet access, help them locate the online response cards at <4mmp.cdc.gov>. If they do not have access to the internet, continue with the interview but read aloud responses as indicated.)

"I need to share a little more information about the survey and then we can begin."

(Note: Read aloud the informed consent, answer any questions the participant may have, obtain verbal or written consent per local protocols).

If they do not have time for an on-the-spot interview:

MMP Staff: "Ok, let's find a day and time when you are able to do the survey. We can do it over the phone or in-person. Which would you prefer?"

(Note: Schedule a future appointment. If appointment will be over the phone, ask for mailing or email address to send response cards.)

If not interested in participating in MMP:

MMP Staff: "May I ask why you are not interested? Knowing why you do not want to take part in the health survey is also very helpful to me."

(Note: Capture this information. Attempt to address concerns using refusal aversion techniques. If they still refuse, thank the person for his/her time and end recruitment.)