Attachment 3 – Telephone Screening Script – Respondent recruited from newspaper advertisement/flyer

Sample screening script for respondent contact by Collaborating Center for Questionnaire Design and Evaluation Research (CCQDER) Recruiter/CCQDER/RSS Staff for usability testing of a new US passport application form recruited through newspaper advertisement/flyer

Dial respondent's telephone number [hereafter referred to as *R*] as indicated on CCQDER voice mail system.

> **Note: Speak only to *R*. If the number is answered by voice mail, call back at another time.**

CCQDER Recruiter/CCQDER Staff: Good morning/afternoon, may I speak to (name)?

> **If *R* is not available or not at home, say, "Thank you" and try again at another time.**

If the person who answered the phone (NOT R) asks, "Who is calling?" or "What's this about?" say, "I am returning their call to me. I'll try to reach them at another time.

> **If *R* has been successfully contacted, continue...**

...Hello, my name is [CCQDER Recruiter/CCQDER/RSS Staff's name]. I am calling from the National Center for Health Statistics. You may remember that you responded to the advertisement we placed in the [name of newspaper or online platform] on [date] or flyer looking for adults who are interested in participating in a study to test a new version of the US passport application. Is this a safe time to talk? If you are driving, I will call you back. I can also call you back if you are too busy.

> **Wait for acknowledgment, such as, "This is a safe time to talk."**

...To determine if you are eligible for our study, I'll need a few minutes of your time to ask some background questions. Answering these questions is completely voluntary and takes about 5 minutes. We are required by law to use your information for statistical research only and to keep it confidential. The law prohibits us from giving anyone any information that may identify you without your consent. The OMB control number for this telephone screener is 0920-0222. Is this a good time to ask the questions or should I call back later?

> **If not a good time to talk, schedule a time to call back.**

> **If good time to talk, continue...**

1. Where did you see our advertisement/flyer?

   _____

1a. Each ad/email has a code on it. What code was on the advertisement/email that you saw/received?

    _____

If respondent does not know the code, ask 1b
1b. How much money did the ad/email say the study was paying?

    _____

2. How old are you? **[If under age 18, go to exit script 1]**

3. What is your gender?
    Woman
    Man
    Transgender
    Non-binary
    Something Else _____

4. What is the highest level of school you have completed?
        Less than High School (No Diploma or GED)
        High School Diploma or GED
        Associate Degree
        Some College
        Bachelor's Degree
        Graduate Degree

5. Are you Spanish, Hispanic or Latino?
        Yes
        No

6. What race or races do you consider yourself to be? You may indicate more than one race.
        American Indian or Alaska Native
        Asian
        Black or African American
        Native Hawaiian or Other Pacific Islander
        White

[If the recruitment needs for certain demographic groups have been achieved, go to exit script 3]. Otherwise continue.

7. FOR INTERVIEWS CONDUCTED ONSITE AT NCHS-- Are you a U.S. citizen? **[If No, go to exit script 4]**
   • Yes
   • No

8. FOR INTERVIEW CONDUCTED VIRTUALLY— Are you able to access a computer, tablet or cellphone with internet and video capability? **[If No, go to exit script 5]**
   • Yes
   • No

_____

Entry Script for interviews conducted virtually:
...Based on your answers to the questions so far, we would like you to take part in our study. For this study we'd like you to use a computer, tablet, or cellphone to have a video call via Zoom with an interviewer that works at the National Center for Health Statistics. Someone from NCHS will walk you through the process of downloading and setting up Zoom on your device. During the interview, the interviewer will ask you a variety of questions about your experiences filling out a draft version of a new US passport application form. Then the interviewer will ask you to explain what you were thinking

and any difficulties that you experienced. Your answers will help us find out if the application form will be easy for other people to answer. NCHS secures all information we collect, process and store on our systems as required by Federal regulations, Executive Orders, and NCHS confidentiality statutes. However, NCHS cannot secure and protect your personal computing devices, such as personal computer or smart phones, used to complete the NCHS interview.

With your permission, we would like to record your interview. The recording is a record of what we asked and what you said about the questions. Do you give permission to have your interview video recorded? *Yes/No*. **[If no, go to exit script 6. At a minimum video recording is essential for this project].**

After we talk today, you will be sent a confirmation email with the date and time of your interview. Can we have your email address to send the confirmation email? *Get e-mail*. Attached with the confirmation email will be a consent form. To take part in the study you must read the entire consent form. The consent form tells you about the study and what you will be asked to do. If you have any questions about confidentiality, identity protection, procedures or other topics related to the study please contact me [name] at [phone number/email] any time before your interview.

Do you have any questions at this point? *Pause to answer questions.* If (not/you have no other questions), then let's get you on the schedule, ok? We will be interviewing (Day, Month/Date) through (Day, Month/Date) from (time to time). Looking at your schedule, when would you be available to participate? *Schedule.* **[If date/times not available go to exit script 7.]**

> What is your mailing address? We will use this address to send you $50 cash via FedEx after the completion of the interview. Packages typically take 5 business days to arrive.

Do you have 5 minutes right now to set up Zoom on the device you will be using for the interview? If not, we can schedule another time to do it prior to the interview.

We ask that you be in a quiet, private space, alone with minimal distractions during your interview. To protect your identity, we ask that no photos or personable identifiable items be visible during the interview. To minimize movement and distractions during the interview please place your device on a stable surface.

A reminder call will be made to you a few days in advance. Should you have any questions or need to change your appointment, please feel free to contact me [name] at [phone number]. Thank you for responding to our ad, and I look forward to seeing you through Zoom on (DATE/TIME) *Get respondent to cite date & time if possible.*

Entry Script for interviews conducted in-person in a private location:
...Based on your answers to the questions so far, we would like you to take part in our study. For this study we'd like you to come to an agreed upon mutual location. the interviewer will ask you a variety of questions about your experiences filling out a draft version of a new US passport application form. Then the interviewer will ask you to explain what you were thinking and any difficulties that you experienced. Your answers will help us find out if the application form will be easy for other people to answer. Everything you say will be kept private. With your permission, we would like to record your interview. The recording is a record of what we asked and what you said about the questions. Do you give permission to have your interview video recorded? *Yes/No*. [**If no, ask if for permission to audio record].** Do you give permission to have your interview audio recorded? *Yes/No*. **[If no, go to exit script 6. At a minimum audio recording is essential for this project].**

Do you have any questions at this point? *Pause to answer questions.* If (not/you have no other questions), then let's get you on the schedule, ok? We will be interviewing (Day, Month/Date) through (Day, Month/Date) from 8 a.m. to 6 p.m. Looking at your schedule, when would you be available to participate? *Schedule.* **[If date/times not available go to exit script 7.]**

A reminder call and email will be made to you a few days in advance. Should you have any questions or need to change your appointment, please feel free to contact me [name] at [phone number]. Thank you for responding to our ad, and I look forward to seeing you here at (DATE/TIME) *Get respondent to cite date & time if possible.*

Exit script 1: I'm sorry, you must be 18 years of age or older take part in this study and therefore we won't be able to use you at this time. We appreciate your call and thank you for your interest in our study.

Exit script 2: I'm sorry, you have not met one of the eligibility requirements for this study. However, I would like to put your name and the information you gave me into our database so that I can contact you about other studies coming up in the future. Is that ok? *If yes, record name & number. If no:* OK, thank you for your time.

Exit script 3: Based upon your answers, it seems that we may already have a number of volunteers with very similar answers to yours. At this point we need to talk with people with some different characteristics. However, if we have cancellations or other slots open up, I may wish to call you back. Would it be okay if I kept your name, telephone number, and the information you provided in response to the eligibility questions until the end of this study? *If yes,* make notation. *If no:* Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Exit Script 4*:* I'm sorry, all Federal Government facilities require screening procedures for non-U.S. citizens. This process can take more than 30 days. Unfortunately, our study must be completed before your screening process would be complete. Would you be agreeable to having your interview conducted at an offsite location? *If yes,* discuss off-site interviewing locations. *If no:* Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Exit script 5: I'm sorry, these interviews will be conducted over video chat and you need a computer, tablet or cellphone with internet to participate; therefore, we won't be able to schedule you at this time. Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Exit script 6: I'm sorry, willingness to be [FOR VIRTUAL: video/ FOR INTERVIEWS TO BE CONDUCTED AT NCHS: audio] recorded is required to take part in this study and therefore we won't be able to schedule you at this time. Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Exit script 7: I see...ok, we were hoping to complete this particular study between (Month/Date) and (Month/Date), so it looks like we won't be able to schedule you at this time. Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Attachment 3 – Telephone Screening Script – Respondent recruited from CCQDER Respondent Database

Sample screening script for respondent contact by CCQDER Recruiter/CCQDER Staff
Person for usability testing of a new US passport application form recruited through CCQDER Respondent Database

Dial respondent's telephone number [hereafter referred to as R] as indicated in the CCQDER Respondent Database.

- **Note: Speak only to R. If the number is answered by voice mail, call back at another time.**

- **CCQDER Recruiter/CCQDER/RSS Staff:** Good morning/afternoon, may I speak to (name)?

- **If R is not available or not at home, say, "Thank you" and try again at another time.**

- **If the person who answered the phone (NOT R) asks,** "Who is calling?" or "What's this about?" say, "I am returning their call to me. I'll try to reach them at another time.

- **If R has been successfully contacted, continue...**

...Hello, my name is [CCQDER Recruiter/CCQDER/RSS Staff name]. I am calling from the National Center for Health Statistics. You may remember that you participated in a research study back in [date] testing questions on [topic]. Is this a safe time to talk? If you are driving, I will call you back. I can also call you back if you are too busy.

- **Wait for acknowledgment, such as, "This is a safe time to talk."**

…We are in the process of testing a new version of the US passport application form and wondered if you might be interested in participating.

- **If R indicates they are interested in participating continue…**

- **If R indicates they are NOT interested in participating, go to exit script 1.**

- ...To determine if you are eligible for our study, I'll need about 5 minutes of your time to ask some background questions. Answering these questions is completely voluntary. We are required by law to use your information for statistical research only and to keep it confidential. The law prohibits us from giving anyone any information that may identify you without your consent. The OMB control number for this telephone screener is 0920-0222. Is this a good time to ask the questions or should I call back later?

- **If not a good time to talk, schedule a time to call back.**
- **If good time to talk, continue...**

1. How old are you now? **[if under age 18, go to exit script 2]**

   _____

3. What is your gender?
   Woman
   Man
   Transgender
   Non-binary
   Something Else _____

4. What is the highest level of school you have completed?
   Less than High School (No Diploma or GED)
   High School Diploma or GED
   Associate Degree
   Some College
   Bachelor's Degree
   Graduate Degree

5. Are you Spanish, Hispanic or Latino?
   Yes
   No

6. What race or races do you consider yourself to be? You may indicate more than one race.
   American Indian or Alaska Native
   Asian
   Black or African American
   Native Hawaiian or Other Pacific Islander
   White

[If the recruitment needs for certain demographic groups have been achieved, go to exit script 4.] Otherwise continue.

7. FOR INTERVIEWS CONDUCTED ONSITE AT NCHS-- Are you a U.S. citizen? **[If No, go to exit script 5]**
   • Yes
   • No

8. FOR INTERVIEW CONDUCTED VIRTUALLY— Are you able to access a computer, tablet or cellphone with internet and video capability? **[If No, go to exit script 6]**
   • Yes
   • No

_____

Entry Script for interviews conducted virtually:
...Based on your answers to the questions so far, we would like you to take part in our study. For this study we'd like you to use a computer, tablet, or cellphone to have a video call via Zoom with an interviewer that works at the National Center for Health Statistics. Someone from NCHS will walk you through the process of downloading and setting up Zoom on your device. During the interview, the interviewer will ask you a variety of questions about your experiences filling out a draft version of a new US passport application form. Then the interviewer will ask you to explain what you were thinking and any difficulties that you experienced. Your answers will help us find out if the application form will be easy for other people to answer. NCHS secures all information we collect, process and store on our systems as required by Federal regulations, Executive Orders, and NCHS confidentiality statutes. However, NCHS cannot secure and protect your personal computing devices, such as personal computer or smart phones, used to complete the NCHS interview.

With your permission, we would like to record your interview. The recording is a record of what we asked and what you said about the questions. Do you give permission to have your interview video recorded? *Yes/No*. **[If no, go to exit script 7. At a minimum video recording is essential for this project].**

After we talk today, you will be sent a confirmation email with the date and time of your interview. Can we have your email address to send the confirmation email? *Get e-mail*. Attached with the confirmation email will be a consent form. To take part in the study you must read the entire consent form. The consent form tells you about the study and what you will be asked to do. If you have any questions about confidentiality, identity protection, procedures or other topics related to the study please contact me [name] at [phone number/email] any time before your interview.

Do you have any questions at this point? *Pause to answer questions.* If (not/you have no other questions), then let's get you on the schedule, ok? We will be interviewing (Day, Month/Date) through (Day, Month/Date) from (time to time). Looking at your schedule, when would you be available to participate? *Schedule.* **[If date/times not available go to exit script 8.]**

> What is your mailing address? We will use this address to send you $50 cash via FedEx after the completion of the interview. Packages typically take 5 business days to arrive.

Do you have 5 minutes right now to set up Zoom on the device you will be using for the interview? I f not, we can schedule another time to do it prior to the interview.

We ask that you be in a quiet, private space, alone with minimal distractions during your interview. To protect your identity, we ask that no photos or personable identifiable items be visible during the interview. To minimize movement and distractions during the interview please place your device on a stable surface.

A reminder call will be made to you a few days in advance. Should you have any questions or need to change your appointment, please feel free to contact me [name] at [phone number]. Thank you for responding to our ad, and I look forward to seeing you through Zoom on (DATE/TIME) *Get respondent to cite date & time if possible.*

Entry Script for interviews conducted onsite at NCHS or off-site:
...Based on your answers to the questions so far, we would like you to take part in our study. For this study we'd like you to come here to the National Center for Health Statistics in Hyattsville, Maryland/agreed mutual location. An interviewer will ask you a variety of questions about your experiences with filling out a new version of the US passport application. Then the interviewer will ask you to explain what you were thinking as you answered the questions. The interviewer will also ask you about your opinions of the questions. Your answers will help us find out if the survey questions will be easy for other people to answer. Everything you say will be kept private. With your permission, we would like to record your interview. The recording is a record of what we asked and what you said about the questions. Do you give permission to have your interview video recorded? *Yes/No*. **[If no, ask if for permission to audio record].** Do you give permission to have your interview audio recorded? *Yes/No*. **[If no, go to exit script 7. At a minimum audio recording is essential for this project].**

Do you have any questions at this point? *Pause to answer questions.* If (not/you have no other questions), then let's get you on the schedule, ok? We will be interviewing (Day, Month/Date) through (Day, Month/Date) from 8 a.m. to 6 p.m. Looking at your schedule, when would you be available to participate? *Schedule.* **[If date/times not available go to exit script 8]**.

A reminder call and email will be made to you a few days in advance. Should you have any questions or need to change your appointment, please feel free to contact me [name] at [phone number]. Thank you for responding to our ad, and I look forward to seeing you here at (DATE/TIME) *Get respondent to cite date & time if possible.*

Exit script 1: I see...ok. Would it be okay if I kept your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.

Exit script 2: I'm sorry, you must be 18 years of age or older to take part in this study and therefore we won't be able to use you at this time. We appreciate your call and thank you for your interest in our study.

Exit script 3: I'm sorry, you have not met one of the eligibility requirements for this particular study. Would it be okay if I kept your name, telephone number, age, educational level, and race in our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.

Exit script 4: Based upon your answers, it seems that we may already have numerous volunteers with very similar answers to yours. At this point we need to talk with people with some different characteristics. However, if we have cancellations or other slots open, I may wish to call you back. Would it be okay if I kept your name, telephone number, and the information you provided in response to the eligibility questions until the end of this study? *If yes*, make notation. *If no:* Would it be okay if I kept your name, telephone number, age, educational level, and race in our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.

Exit Script 5*:* I'm sorry, all Federal Government facilities require screening procedures for non-U.S. citizens. This process can take more than 30 days. Unfortunately, our study must be completed before your screening process would be complete. Would you be agreeable to having your interview conducted at an offsite location? *If yes*, discuss off-site interviewing locations. *If no,* would it be okay if I kept your name, telephone number, age, educational level, and race in our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.

Exit script 6: I'm sorry, these interviews will be conducted over video chat and you need a computer, tablet or cellphone with internet to participate; therefore, we won't be able to schedule you at this time. Would it be okay if I added your name, telephone number, age, educational level, and race to our database so that I can contact you about other studies coming up in the future? If yes, add to database. If no: OK, thank you for your time. Your name and any information you gave me will not be added to our database.

Exit script 7: I'm sorry, willingness to be [FOR VIRTUAL: video/ FOR INTERVIEWS TO BE CONDUCTED AT NCHS: audio] recorded is required to take part in this study and therefore we won't be able to use you at this time. Would it be okay if I kept your name, telephone number, age, educational level, and race in our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.

Exit script 8: I see...ok, we were hoping to complete this particular study between (Month/Date) and (Month/Date), so it looks like we won't be able to schedule you at this time. Would it be okay if I kept your name, telephone number, age, educational level, and race in our database so that I can contact you about other studies coming up in the future? If yes, keep in database. If no: OK, thank you for your time. Your name and any information you gave me will be deleted from our database.