PROTOCOL FOR MAIL VISIT

This protocol outlines the steps taken to run the Mailed Visit To-Do's; prepare packets containing welcome letters, questionnaires, and thank-you cards; receive, document and enter age specific questionnaires; and perform follow-up for questionnaires.

SECTION 1: RUNNING TO-DOS AND SENDING OUT PACKETS

This section outlines the To-Do's in ADEPT to send welcome letters, questionnaires, and thank-you cards for both mom and child. It also provides instruction on creating and sending out corresponding packets.

Welcome Letter and Contact Logs

The Welcome Letter is the first piece of correspondence mailed to participants and introduces the Age __ visit. Age __ Welcome Letter Labels are generated in ADEPT via a To-Do 3 weeks prior to the child's birthday. Once the Welcome Letter Label To-Do has been run, the Contact Logs are automatically generated. The RA will check the To Do's once a week.

Running the To-Do:

1. Log into ADEPT, and click on **To-Do's → Mailed Visit To-Do's**.
2. Select **Welcome Letter Labels** and click the **Run Selected Task** button.
3. A new window will open indicating the number of welcome letter labels. Click on the link to open a PDF containing a mail-merge template of address labels. Print one copy of the labels on a label sheet (Avery 5160).
4. If the labels printed correctly, close the label window and click the **Everything Printed OK** button. If this button is not clicked and the window is exited, ADEPT will not recognize this To Do as being run and these IDs will appear again the next time the To Do is selected.
5. The window will refresh and IDs will be added for which a label was created. **Be sure to wait for this screen to be updated!**
6. Once updated, a list of IDs will be generated for which a Welcome Letter Label has been generated. Another window will open indicating that Contact Logs are being generated.
7. After the Contact Log program finishes running, click the **Close** button for that window.
8. Navigate back to the **Age 11 To Do List** window and save a PDF copy in *Vivafile folder* with the name of the To Do and the date run (*e.g. Age 11 Mom Welcome Letter Labels 06-17-2010.pdf*).
   Note: *In rare cases, a glitch in ADEPT may prevent contact logs from automatically being generated. This may be caused by exiting out of ADEPT before the Welcome Letter Labels have been run, or an unexpected system crash. In such a case, run the Contact Log To Do to generate the contact logs. Select* ***Contact Logs for Age 11*** *and then* ***Run Selected Task*** *button. A window will open indicating the Contact Logs have been generated.*

Assembling and Mailing the Welcome Letter Packets:

1. Print out Age __ Welcome Letters
2. Stuff each envelope with the Welcome Letter.

3. Take all labels printed from ADEPT and adhere to Project Viva envelope.
4. Batch the packets and send in groups of no more than 25, with the department blank mail slip attached. Write the grant number on the slip.

Mom Questionnaires

The preferred method for mom's to complete the Age __ questionnaire is online. By default the link to the Mom Questionnaire will be emailed to participants who have a valid email address and have indicated it is okay to contact them via email. Only if there is no email address, if the participant has asked not to be contacted via email, or if the email bounces back will a mom be mailed a paper copy.
Note: *In instances where only the mother has been disenrolled (due to death, not having child custody, etc), correspondence will be directed to a person designated as the Key Contact. In these cases, no additional steps are necessary to ensure delivery to the Key Contact as long as the Locator Data System is up-to-date. See CIS/CUS protocol or Data Manager for more information.*

Mom Questionnaire E-Mails

The Mom Questionnaire E-Mails are generated three weeks after the Welcome Letter Labels are run for participants who have indicated that it is ok to send them e-mails and who have valid e-mail addresses. The RA will check the To-Do's once a week.
Note: *No questionnaire e-mails will be generated if a participant has refused the Age __ visit (EN11 status=3, 4, 5 or 6).*
Note: *A bug in the CASI/ADEPT system is randomly causing links sent in questionnaire e-mails to direct participants to a CASI Error Page. This bug is resolved by informing the participant to copy the link's URL (the link text) and paste it into the address bar of the participant's internet browser. Programmers at NERI are working on a more permanent solution.*
Note: *If a participant e-mails the Viva Inbox about an error occurring in the CASI system, inform the Data Manager.*

Running the To-Do:

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.
2. Select the **Mom Questionnaire E-Mails** and click the **Run Selected Task** button.
3. A new window will open containing a list of e-mails and associated IDs for which ADEPT has successfully sent an e-mail. A successful delivery will generate the following line in the list: "**Email sent to the Mom (xyz@yahoo.com) for ID C999999.**"
4. Scan this list to make sure no errors have occurred and all e-mails have been sent. If an error has occurred, follow the directions in the next section. An unsuccessful delivery will generate the following line in the list: **WARNING: Email to the Mom (abc.def@xxx.org abc123@yahoo.com) for ID C999999 FAILED.**
5. Save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (i.e. *Age 11 Mom E-Mail 06-17-2010.pdf*).
6. Paste the list of IDs in the *Age __ Mailed Visit Follow Up Tool.xls* to be used for follow-up. This is a separate Excel sheet that can be used to help the RA know when it is time to send another packet or email, or to follow-up with a phone call.

<u>If there is an Error Sending E-mails</u>:

1. Look for errors by scanning the printout ADEPT provides of all of the participants that an e-mail was sent to. Also, look in the Viva Inbox and check for any bounce-back e-mails from Age 11.
2. Record in the CL each participant that had an error or bounce back.
3. Check the CIS folder for that participant to make sure there were no errors when entering the e-mail address into ADEPT, such as missed punctuation, incorrect spellings, etc.
4. If unable to find an error on a CIS, call the participant to attempt to obtain the correct e-mail address. If the correct e-mail has been found create a CUS updating the information.
5. Have the RA responsible for entering CIS/CUS enter the CUS into the Locator System as soon as possible. Once the e-mail address is updated in ADEPT, use the Web-Survey Status e-mail tool to resend the e-mail with a standard e-mail message (see Section 3- Follow Up).
6. If a correct email address is not found, record paper copy as being sent (see Section 3- Follow Up).

<u>Mom Questionnaire E-mail Reminders:</u>

The Mom Questionnaire E-mail Reminders are generated 1 week after the Mom Questionnaire E-mails for participants that still have a valid e-mail address and have indicated that it is ok to send them an e-mail. The RA will check and run the To-Do's once a week.
Note: *No questionnaire e-mails will be generated if a participant has refused the Age __ visit (EN11 status=3, 4, 5, 6) or if a QU has been entered/logged. Also, no reminder e-mails will be sent if a* ***Paper Copy has been recorded*** *(see Section 3- Follow Up).*

<u>Running the To-Do:</u>

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.
2. Select the **Mom Questionnaire Reminder E-Mails** and click the **Run Selected Task** button.
3. A new window will open indicating e-mails are being sent to specific addresses and IDs. At the bottom, a list of IDs will be generated displaying all of the IDs that an e-mail was sent to. Scan this list to make sure no errors have occurred. If an error has occurred, see section above.
4. Save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (i.e. *Age 11 Mom E-Mail Reminders 06-17-2010.pdf*).

<u>Mom Questionnaire Labels</u>

The Mom Questionnaire Labels are generated 3 weeks after the Welcome Letter Labels are run for participants who have indicated they do not want to be contacted by e-mail, or who have an invalid or no e-mail address. The RA will check the To-Do's once a week. ***Note****: No questionnaire label will be generated if a participant has actively refused the Age 11 visit (EN11 status=3, 4, 5, 6). It is advisable to create packets as outlined below in preparation for large mailings.*

<u>Running the To-Do:</u>

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.

2. Select the **Mom Questionnaire Labels** button and click the **Run Selected Task** button.
3. A new window will open indicating the number of Mom Questionnaire Labels to be printed. Click on the link to open a PDF containing a mail-merge template of address labels. Print one copy of the labels on a label sheet (Avery 5160).
4. If the labels printed correctly, close the label window and click the **Everything Printed OK** button. If this button is not clicked and the window is exited, ADEPT will not recognize this To Do as being run and these IDs will appear again the next time the To Do is selected.
5. The window will refresh and IDs will be added for which a label was created. **<u>Be sure to wait for this screen to be updated</u>!**
5. Once updated, a list of IDs for which a questionnaire label was created. Save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (e.g. *Age 11 MQU 06-17-2010.pdf*).
6. Print the list. This list will be used when assembling and mailing the packets.
7. Paste the list of IDs in the *Age __ Mailed Visit Follow Up Tool.xls* to be used for follow-up. This is a separate Excel sheet that can be used to help the RA know when it is time to send another packet or email, or to follow-up with a phone call.

<u>Assembling and Mailing the Mom Questionnaire Labels</u>

1. For mailing the Mom Questionnaires, you will need the following materials:
   a. Large Viva Envelope
   b. Large Viva Business Reply Envelope
   c. Age __ Intro Letter for Moms
   d. LC
   e. QU
2. Next, use the printed ID list to pull labels from the label cabinet.
3. Each ID label must be put in the exact order of what is printed, as they will correspond to the name/address labels printed by ADEPT. The name/address labels from ADEPT go from left to right, and correspond with each ID starting from the top of the printed page.
4. Each packet will require 2 labels at this time- 1 child label for the QU, and 1 mom label for the LC. Four additional child labels will be required for the CQ, CE, EN and folder. It may be helpful to store extra ID labels at your desk in anticipation of the child mailing and the forms being received.
5. Use an **orange** highlighter to highlight the ID. Fill out the labels by writing **AG__** in the visit field (**notice**- no 'e'), the day the **To Do was run** in the date field, and **your initials** in the RA field. Affix the ID labels to the forms.
6. Write the **child's first name** on the first page of the QU. You can find the name by looking on the address label. It will be the second name listed.
7. Paper clip together, and place in the Large Viva Envelope **with the corresponding name/address label** of the ID.
8. Batch the packets and send in groups of no more than 25, with the department blank mail slip attached. Write the grant number on the slip.

<u>Mom Thank You Letters:</u>

The Age __ Mom Thank You Letters are generated when the QU has been entered or logged. The RA will check the To-Do's once a week.

<u>Running the To Do:</u>

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.
2. Select the **Mom Thank You Labels** button and click the **Run Selected Task** button.
3. A new window will open indicating the number of Mom Thank You Labels to be printed. Click on the link to open a PDF containing a mail-merge template of address labels. Print one copy of the labels on a label sheet (Avery 5160).
4. If the labels printed correctly, close the label window and click the **Everything Printed OK** button. If this button is not clicked and the window is exited, ADEPT will not recognize this To Do as being run and these IDs will appear again the next time the To Do is selected.
5. The window will refresh and IDs will be added for which a label was created. **<u>Be sure to wait for this screen to be updated</u>!**
6. Navigate back to the **Age __ To Do List** window and save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (e.g. *Age 11 Mom TYs 06-17-2010.pdf*).

<u>Assembling and Mailing the Thank You Letters:</u>

1. For mailing the Mom Thank You Letters, you will need:
   a. Small Viva Envelope
   b. Mom Thank You Letter
2. Affix the Thank You Letter Labels to envelopes.
3. Write the mother's first name on the Thank You Letter (her name can be found by referring to the Thank You Letter Labels).
4. Stuff each envelope with corresponding Thank You Letter. Make sure the address label matches the name on the letter.
5. Batch the packets and send in groups of no more than 25, with the department blank mail slip attached. Write the grant number on the slip.

<u>Child Questionnaires</u>

All children receive the Age __ Child Questionnaire via mail. It is 2 pages front and back and pre-printed in color. ***<u>There are separate questionnaires for boys and girls. It is very important that the correct gender is sent to each child.</u>***

<u>Child Questionnaire Labels</u>

The Child Questionnaire Labels are generated 1 week after the Mom Questionnaire Label or E-mail To- Do has been run. The RA will check the To-Do's once a week.

Note: *No label will be generated if a parent or child has refused the visit (CE11 status=3, 4, 5 or 6). It is advisable to create packets as outlined below in preparation for large mailings.*

<u>Running the To-Do:</u>

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.
2. Select the **Child Questionnaire Labels** button and click the **Run Selected Task** button.

3. A new window will open indicating the number of Mom Questionnaire Labels to be printed. Click on the link to open a PDF containing a mail-merge template of address labels. Print one copy of the labels on a label sheet (Avery 5160).
4. If the labels printed correctly, close the label window and click the **Everything Printed OK** button. If this button is not clicked and the window is exited, ADEPT will not recognize this To Do as being run and these IDs will appear again the next time the To Do is selected.
5. The window will refresh and IDs will be added for which a label was created. **Be sure to wait for this screen to be updated!**
6. Navigate back to the **Age __ To Do List** window and save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (e.g. *CQ11 Labels 06-17-2010.pdf*).
7. Print the list. This list will be used when assembling and mailing the packets.
8. Paste the list of IDs in the *Age __ Mailed Visit Follow Up Tool.xls* to be used for follow-up. This is a separate Excel sheet that can be used to help the RA know when it is time to send another questionnaire.

Assembling and Mailing the Child Questionnaire Labels

1. For mailing the Child Questionnaires, you will need the following materials:
   a. Large Viva Envelope
   b. Small Viva Business Reply Envelope
   c. Intro Letter for Child
   d. CQ__ *(These are pre-printed in color. Make sure an updated form label has been placed on each page of the footer of the CQ before mailing.)*
2. Next, use the printed ID list to pull labels from the label cabinet (if QU was emailed) or your desk (if QU was mailed). Each packet will require 1 child label at this time. Additional labels may be needed for the CE, EN, and folder. It may be helpful to store extra ID labels at your desk in anticipation the forms being received.
3. Each ID label must be put in the exact order of what is printed, as they will correspond to the name/address labels printed by ADEPT. The name/address labels from ADEPT go from left to right, and correspond with each ID starting from the top of the printed page.
4. Use an **orange** highlighter to highlight the ID. Fill out the label by writing **AG** in the visit field **(notice-** no 'e'), the day the **To Do was run** in the date field, and **your initials** in the RA field. **Affix the ID label to the appropriate version of the form (male or female). The address labels identify whether the participant is a boy or girl indicated with an 'F' or 'M' next to the date on the label. It is very important that children receive the correct version of the questionnaire.**
5. Remove the address labels and affix to the large Viva envelope.
6. Write the child's name on the Child Intro Letter and place on top of the CQ, paper clip together, and place in the Large Viva Envelope.
7. Batch the packets and send in groups of no more than 25, with the department blank mail slip attached. Write the grant number on the slip.

Child Thank You Letters:

The Child Thank You Letters are generated when the CQ has been entered or logged. The RA will check the To-Do's once a week.

Running the To Do:

1. Log into ADEPT, and click on **To-Do's → Age __ To-Do's**.
2. Select the **Child Thank You Labels** button and click the **Run Selected Task** button.
3. A new window will open indicating the number of Child Thank You Labels to be printed. Click on the link to open a PDF containing a mail-merge template of address labels. Print one copy of the labels on a label sheet (Avery 5160).
4. If the labels printed correctly, close the label window and click the **Everything Printed OK** button. If this button is not clicked and the window is exited, ADEPT will not recognize this To Do as being run and these IDs will appear again the next time the To Do is selected.
5. The window will refresh and IDs will be added for which a label was created. **Be sure to wait for this screen to be updated!**
6. Navigate back to the **Age __ To Do List** window and save the list of IDs as a PDF in *J:\vivafile* with the name of the To Do and the date run (i.e. *Age 11 Child TYs 06-17-2010.pdf*).

Assembling and Mailing the Thank You Letters:

1. For mailing the Child Thank You Letters, you will need:
   a. Small Viva Envelope
   b. Child Thank You Letter (*J:\vivafile\Age 11\Child Questionnaires\Age 11 child thank you_ CLEAN 11-2-10.doc)*
2. Affix the Thank You Letter Labels to envelopes.
3. Write the child's first name on the Thank You Letter (his/her name can be found by referring to the Thank You Letter Labels).
4. Stuff each envelope with corresponding Thank You Letter. Make sure the address label matches the name on the letter.
5. Batch the packets and send in groups of no more than 25, with the department blank mail slip attached. Write the grant number on the slip.

SECTION 2: RECEIVING AND RECORDING FORMS

This section provides instruction for receiving and recording incoming questionnaires from mom and child participants.

Online Questionnaires:

Parent forms are completed online via CASI (including the enrollment form) and stored in ADEPT's database. Participants who complete the Age __ visit online do not require any forms to be filed, with the exception of the Contact Info Sheet. The CI's should be printed and entered weekly to ensure up-to-date information is stored in ADEPT.

Printing CI for Data Entry:

Generate and print a list of CI's to be entered:

   a. Log into ADEPT and click on **Reports → Form Reports → Detail Form Status**
   b. In the first three boxes, make sure **Participant Data**, **Age __ Visit** and **CI__** are selected.

   c. In the box titled “Include forms that are,” check **completed.**
   d. Hit OK. A window will open generating the report.
   e. Copy the generated table and paste into Excel (**Note**: only select the table, not heading information, otherwise the table will not paste correctly. You also may have to select “paste special” and then paste as text because excel may default to HTML formatting) Once the data has been pasted, sort by Date by selecting the data, clicking on the **Data tab**, and then the ‘**Sort’** button. Delete cells where the date matches those already logged in the “CI Forms Logging” tab of the *Age __ Mailed Visit Follow Up Tool.*
   f. Print out this list.
2. Print and log the CI’s entered via CASI:
   a. Work in batches of no more than 10.
   b. For each ID, you will have to go into the CI11 form in the Age 11 Event. Go in under **“browse”** mode (the light blue button).
   c. Print the CI from browse mode and exit from the Data Entry Screen.
   d. Log the forms that have been printed by going to **Main Menu → Forms Logging →Log Forms by Form**. Select the CI11 and log up to 5 IDs at a time. (**Note:** if you accidently log an incorrect ID, see the Data Manager to un-log the form. **Use care when logging forms, as ADEPT will not generate an error if a form that does not exist is logged**)
3. Delete the IDs from appropriate tab on the *Age __ Mailed Visit Follow Up Tool.xls* if the QU was received.

   Note: *If you log a form incorrectly, please inform the Data Manager so he/she may unlog the form (currently can only be performed by DM). If multiple copies of the CI10 form appear in the Form Summary screen in ADEPT, this is due to the CI10 being logged on multiple occasions. If you notice this, inform the DM that the form needs to be unlogged, and then re-logged. This will resolve the problem.*

Receiving Paper Copies of the Mom Questionnaire and Locator Form/Contact Info Sheet:

Participants ideally will return forms within 2 weeks of receiving them. If forms have not been received after one month of sending, the RA should proceed with follow-up (see next section). Additionally, follow-up should be conducted if the LC was received, but not the QU. Follow-up is not necessary if the QU was received but the LC was not returned.

Note: *Do not create separate folders for the child and mom questionnaires. All Age __ forms should be filed in the same place.*

1. Clean forms to locate missing or illegible answers according to the data entry protocol.
   a. Follow-up with participants if there are multiple missing answers.
   b. Go to Data Manager to resolve multiple responses and invalid ranges (e.g. 40 hours of sleep a night).
2. Record in the Contact Log the forms that were received. If both mom and child questionnaires have been received, submit the CL for approval.
3. Complete an enrollment form for each ID, EN. Child ID labels should be saved by the RA from when questionnaires were sent. Indicate status on the enrollment form:

   a. If QU was received (even if Locator Form/Contact Information Sheet was not): Status= 1, Full participation.
   b. If anything but QU was received (i.e. Locator Form/Contact Info Sheet): Status=2, Partial participation. Follow-up with participant as outlined below.
4. Enter the questions on LC's that pertain to the Locator Sheet in the LK forms in ADEPT. These are questions B1 and D2 and are identified with boxes around the question number.
5. File LC's in the CUS/CIS **To-Be entered folder**. These forms will be filed in CUS/CIS folders by the RA responsible for entering CUS/CIS forms. The LC will not be filed in the folder with the questionnaires.
6. Sort QU's by ID, and enter data into ADEPT.
7. Only one folder is needed for each ID; the child and mom questionnaires go in the same folder. You can determine if a folder has already been made when entering the forms into ADEPT.
   a. If the CQ has been entered, put the QU aside to be filed later. This means there is a folder already created for that ID.
   b. If the CQ has not been completed, you will need to create a folder.
      i. Gather manila folders and Child ID labels. Child ID labels should be saved at your desk, but if not pull the label from the cabinet.
      ii. Use **an orange** highlighter to highlight the ID. Fill out the label by writing **AG** in the visit field **(notice**- no 'e'), the day th**e To Do was run** (this will be found on the label of the QU) in the date field, and **your initials** in the RA field.
      iii. Affix the label to the folder.
8. File all forms into the appropriate folder and file in the visit folder cabinets. The folders should be placed **behind** the most recent visit folder.
9. Place any extra labels in the **Labels to Be Filed folder**.
10. Delete the IDs from appropriate tab on the *Age __ Mailed Visit Follow Up Tool.xls*.

<u>Receiving the Child Questionnaire:</u>
Participants ideally will return forms within 2 weeks of receiving them. If forms have not been received after one month of sending, the RA should proceed with follow-up (see next section). ***Note:*** *Do not create separate folders for the child and mom questionnaires. All Age __ forms should be filed in the same place.*

1. Clean forms to locate missing or illegible answers according to the data entry protocol.
   a. Do not follow-up on missing information.
   b. Go to Data Manager to resolve multiple responses and invalid ranges.
2. Record in the Contact Log that the CQ was received. If both mom and child questionnaires have been received, submit the CL for approval.
3. Complete an enrollment form for each ID, CE.
4. Child ID labels should be saved by the RA from when questionnaires were sent. Indicate status on the enrollment form: If CQ11 was received: Status= 1, Full participation.
5. Sort CQ by ID, and enter into ADEPT. (**Note:** For Question 1, the only "check all that apply" question, answers should be entered down the first column and then down the second column.)

6. Only one folder is needed for each ID, the child and mom questionnaires go in the same folder. You can determine if a folder has already been made when entering the forms into ADEPT.
    a. If the QU has been entered from a paper copy put the CQ aside to file later.
    b. If the QU has not been completed or was done online via CASI, you will need to create a folder.
        i. Gather manila folders and Child ID labels. Child ID labels should be saved at your desk, but if not pull the label from the cabinet.
        ii. Use an **orange** highlighter to highlight the ID. Fill out the label by writing **AG__** in the visit field **(notice**- no 'e'), the day the **To Do was run** (this will be found on the label of the CQ) in the date field, and **your initials** in the RA field.
        iii. Affix the label to the folder.
7. File all forms into the appropriate folder and file in the visit folder cabinets. The folders should be placed **behind** the most recent visit folder.
8. Place any extra labels in the **Labels to Be Filed folder**.
9. Delete the IDs from appropriate tab on the *Age __ Mailed Visit Follow Up Tool.xls*.

SECTION 3: PERFORMING FOLLOW-UP

This section provides instruction for following-up on questionnaires for mom and child participants.

Mailed Visit Follow Up Tool

If the CQ and/or QU are not received within one month the RA will begin follow-up. Follow-up should be guided by the dates on Age __ Mailed Visit Follow Up Tool.xls*, which are also outlined below and depicted graphically at the end of the section. The tracking tool allows the RA to track the follow-up for each participant. The IDs are pasted into the Excel sheet when the first questionnaire is mailed or emailed along with the date. The spreadsheet auto-populates the follow-up dates based on the below guidelines. After a questionnaire is completed, the ID can be deleted from the list. We follow-up with each participant approximately once a month for 9 months from the date the original questionnaire was sent. If a participant chooses to not participate in the Age __ visit, the RA will follow the protocol for 'Active Refusal' below. All follow-up will be noted in the contact logs.*

Follow-up for mom email participants:

- One week after original email – Run Reminder E-mail To Do
- Three weeks later – 1st Phone Call / Message (See script below.)
- One month later – 3rd Email with Personal Message (See script below.)
- One month later – 1st Paper Copy
- One month later – 2nd Phone Call / Message (See script below.)
- One month later – 2nd Paper Copy
- One month later – 3rd Phone Call / Message (See script below.)
- One month later – 4th Email with Personal Message (See script below.)

- Two months later – Set to Passive Refusal or Unable to Trace

Follow-up for mom mail participants:

- One month later – 2nd Paper Copy
- One month later – 1st Phone Call / Message (See script below.)
- One month later – 3rd Paper Copy
- One month later – 2nd Phone Call / Message (See script below.)
- One month later – 4th Paper Copy
- Two months later – 3rd Phone Call / Message (See script below.)
- Two months later – Set to Passive Refusal or Unable to Trace

Follow-up for child mail participants:

- One month later – 2nd Paper Copy
- Two months later – 3rd Paper Copy
- Three months later – 4th Paper Copy
- Three months later – Set to Passive Refusal or Unable to Trace

Sending Paper Copies

Participants who have indicated they would like to receive an electronic copy of questionnaires may change their mind. If this occurs, an RA can record a PC form in ADEPT. When this is done, a questionnaire label will be generated in the To Do's while further e-mails will be prevented. In order to record a PC form, the Age __ Event must be initialized, therefore, if a participant responds to the Welcome Letter Label indicating they would like a paper copy, an enrollment form should be completed indicating a status of 7- intent to complete. Note that only one PC form may be recorded for a participant (i.e. recording multiple will not create multiple questionnaire labels) and recording a PC form will not generate a second questionnaire label for participants who have originally received a questionnaire.

Recording a PC Form

1. Log into ADEPT and click on **Participant Data Entry**.
2. Enter child ID.
3. If the Age 11 Event has not been initialized, enter in the EN with a status of 7.
4. Click on the button at the bottom of the screen **'Record Paper Copy Sent'**.
5. A window will pop-up asking for confirmation to record the paper copy. Click **'Ok'**. Another window will pop-up indicating the PC form was recorded.

Phone Follow-up:

Calls should be made on different days at different times. Evening and weekend calls will also be helpful. Be sure to try all numbers when calling and leave a message when possible. If we do not have accurate contact information for a participant the tracking protocol should be followed. Every attempt should be made by the RA to find updated contact information before putting the participant in tracking; this includes but is not limited to calling alternate contacts and White Pages searches. The below scripts can be used as a guide when making follow-up calls for mom questionnaires.

Note: *Phone follow-up should be performed only for mom questionnaires. RAs should not call participants to follow-up regarding child questionnaires. Follow-up for child questionnaires only consists of re-mailing child packets.*

Script for leaving a message:
Hi, this message is for [PART'S NAME]. [PART'S NAME], this is [RA] calling from Project Viva. I'm calling to see if you received the Age __ Questionnaires I sent out a few weeks ago and if you have any questions about it. Your participation is greatly appreciated and we hope you'll send it in at your earliest convenience. If you need another copy or have questions, please contact me at [RA's number]. We look forward to hearing from you soon! Thank you and have a great day!

Script if participant answers:
Hi, may I please speak to [PART'S NAME]. This is [RA] calling from Project Viva. I'm calling to see if you received the Age 11 Questionnaires I sent out a few weeks ago and if you've had time to fill them out?

If YES – Participant mailed QU: Okay great! Thank you very much. We look forward to receiving them soon. Have a great day!

If YES – Received but not completed and/or mailed: Okay great! If you can take some time to fill them out and send them back to us, we would greatly appreciate it. It should only take about twenty minutes to complete them. Thank you and have a great day!

If NO—Not Received: Okay, I will send you another email/packet in the mail. Please let me verify your email/mailing address first to make sure we have the correct information for you. [RA Confirms address]

> *[If we don't have an email address:* We also offer the option of completing the questionnaire online. If you'd like to fill it out online I just need your email address and we can email you the link. *(**Note:** To send an email to someone who was originally sent a paper copy, please see the Data Manager.)]*

Thank you very much for your time. I will get this out to you as soon as possible.

Email Follow-up:
ADEPT automatically generates a reminder e-mail to participants one week after the original e-mail has been sent. After that, e-mail follow-up is performed using the Web Survey Status E-mail Tool. Using this tool, RAs may re-send the original e-mail in a standard format or appended to a personalized message (see script below). It is preferred for participants to complete questionnaires online to improve participant and RA convenience.

Note: *While the Web Survey Status E-mail Tool provides information about the progress of a survey and whether a PC form has been recorded, it was not designed as a follow-up tool, only as a means to resend e-mails.*

Note: *If a participant was originally sent a paper copy of the questionnaire and would like to receive an electronic version, inform the Data Manager. At this time, after the e-mail address has been entered, the DM must delete the item-history for the original questionnaire label, and then run the e-mail To Do. See DM for details.*

Using the Web Survey Status E-Mail Tool

1. Log into ADEPT and click on **Contact Logs → Web Survey Status/Email**.
2. Select the Age __ Visit under 'Web Survey Type' and enter desired search criteria (including name, ID, status, and sent by). Click the OK button.
3. Locate the desired ID and click on the blue **'Send E-mail'** link.
4. Select the radio button designating either standard text, or personalized message and standard text. If selecting the latter, enter in the text in the space provided.
5. Click on the **'Send Email Now'** button.
6. A record that a personalized or standard e-mail was sent is recorded in the item history.

Standard Personalized Email:
Dear [PART],

We are looking forward to receiving your completed Age __ Questionnaires! If you are experiencing difficulties with the online version and would prefer to receive a paper copy, please let me know. Just include your full name and mailing address in either an email or phone message.

Thank you,
[RA & RA Contact Info]

Setting Participants to Active & Passive Refusal, and Unable to Trace or Locate: *All participants must have an enrollment form created and entered into ADEPT for both the child and mom questionnaires. Participants are set to Active Refusal if they chose to opt-out of the Age __ visit, i.e. when making a follow-up call the mom says she will not be completing the questionnaire, but may be willing to participate in the future. If after 9 months of follow-up the questionnaire is not received, participants are set either to Passive Refusal or Unable to Trace or Locate. Unable to Trace or Locate should only be used if the participant is **in tracking**.*

Active Refusal: (only if they ask to opt-out of the visit**)**

1. Collect the labels and complete an enrollment form and folder as noted above. The enrollment form status should be 3: Active Refusal.
2. Enter the enrollment form into ADEPT.
3. Document in the contact log that the participant has refused the visit and submit for approval.
4. File the folder in the large filing cabinets ***behind*** the most recent visit completed folders.

Passive Refusal: (only after 9 months of follow-up)

1. Collect the labels and complete an enrollment form and folder as noted above. The enrollment form status should be 4: Passive Refusal.

2. Enter the enrollment form into ADEPT.
3. Document in the contact log that the participant has been set to passive refusal and submit for approval.
4. File the folder in the large filing cabinets ***behind*** the most recent visit completed folders.

Unable to Trace or Locate: (only after 9 months of follow-up and tracking have been attempted)

1. Only participants **in tracking**, as noted in the contact log, should be set to this status. See tracking protocol for more details on what it means to be **in tracking**.
2. Collect the labels and complete an enrollment form and folder as noted above. The enrollment form status should be 5: Unable to Trace/Locate.
3. Enter the enrollment form into ADEPT.
4. Document in the contact log that the participant has been set to unable to trace/locate and submit for approval.
5. File the folder in the large filing cabinets **behind** the most recent visit completed folders.

Child Questionnaire Follow Up Guidelines

Child Questionnaire Sent

↓ 1 month

2nd Child Questionnaire Sent

↓ 2months

3rd Child Questionnaire Sent

↓ 3 months

4th Child Questionnaire Sent

↓ 3 months

Set to Passive Refusal/ Unable to Trace

Mom Questionnaire Follow Up Guidelines

Mom Questionnaire E-mail Sent

↓ 1 week

Mom Reminder E-mail Sent

↓ 3 weeks

1st Phone Call Reminder

↓ 1 month

3rd E-mail (w/Personal Message) Reminder

↓ 1 month

1st Paper Questionnaire Sent

↓ 1 month

2nd Phone Call Reminder

↓ 1 month

2nd Paper Questionnaire Sent

↓ 1 month

3rd Phone Call Reminder

↓ 1 month

4th E-mail (w/Personal Message) Reminder

↓ 2 months

Set to Passive Refusal/ Unable to Trace

Mom Questionnaire Packet Sent

↓ 1 month

2nd Questionnaire Sent

↓ 1 month

1st Phone Call Reminder

↓ 1 month

3rd Questionnaire Sent

↓ 1 month

2nd Phone Call Reminder

↓ 1 month

4th Questionnaire Sent

↓ 2 months

3rd Phone Call Reminder

↓ 2 months

Set to Passive Refusal/ Unable to Trace