



INSTRUCTIONS FOR THE RECRUITMENT TRACKING AND SCHEDULING (RSF) FORM

I. General Instructions

The Recruitment Tracking and Scheduling Form is completed by the interviewers in conjunction with the Recruiters (if separate staff) to track the screening and baseline appointments of eligible participants. **Complete for ALL participants who are eligible as shown on the Telephone Screening Form (TSF).** If the participant is eligible based on the in-person screening visit, update this form with the baseline appointment date and time. The form also records the ID of an eligible partner. A separate RSF is required for partners who are eligible based on the TSF. Only one occurrence of the form per participant is allowed in CDART.

The Recruitment Committee decided at their June meeting to use the RSF to record when an ARIC participant is eligible to be pre-screened for ACHIEVE, but has no interest in any screening, including answering the questions on the TSF. In this instance, no TSF will be present for the participant. See section II.A.1 for further instructions.

II. Detailed Instructions for Each Item

0a. Enter the date the initial screening appointment was made. This date will not be updated, even if items 2 and/or 6 are changed. See QxQ for item 2 for managing return screening candidates. See QxQ for item 6 when a screened participant needs to reschedule the baseline visit.

0b. Enter the staff ID of the person who did the scheduling. Update the staff ID if necessary for within-site tracking of data collection.

A. Screening Date and Time

Screening Script:

“The answers you gave during the telephone screening interview indicate that you may be eligible to have further testing to determine if you are eligible to participate in the ACHIEVE study. Would you be interested in coming in for further testing?”

1 and 1a. If the participant agrees to be screened, either now or at a later time, answer question 1 with a ‘Yes’. If they are not prepared to set an appointment at that time, still answer yes, so that the Recruitment and Enrollment Scheduling Report in CDART tracks the ID. Answer no if the participant refuses. Record the reason in 1a. Once item 1 is ‘No’, the ID will not be tracked in the Recruitment and Enrollment Scheduling Report.

Special Use of RSF for ARIC Participants Not Interested in ACHIEVE

An ARIC participant who had been identified as ACHIEVE-eligible on the V6V7 Ancillary Study report may not be interested in being screened; they may not want to answer questions on the

TSF. In this case, record 'No' to Q1. Record 'No interest' in Q1a. No TSF will be required for these ARIC participants.

2 and 3. Record the appointment date and time for the in-person Screening visit. Ideally, the time between telephone screening and in-person screening will be brief. Update the date and time of the screening appointment when a prescreened participant either doesn't show for their appointment or they reschedule the screening appointment.

4 [and 5 if indicated]. Field 4 is auto-populated from TSF12. Field 5 is completed when Field 4 is 'Yes'.

If TSF12 is 'Yes', then CDART will populate item 4 with a 'yes' and will open up field 5 to record the Partner ID. **NOTE: the partner must have an ID and a corresponding TSF.** The TSF for the partner should already be completed in CDART. This partner may or may not be eligible based on his/her TSF. Record the Partner ID regardless. Then, save and close the form for now, until the **screening eligibility** has been determined. If the participant is eligible based on the screening visit, open the RSF and start with item 6. "If the value is 'yes', then CDART will open up field 5.

If TSF12 is 'No', then CDART will populate item 4 with a 'no'. Save and close the form for now, until the **screening eligibility** has been determined. If the participant is eligible based on the screening visit, open the RSF and answer question 6."

If TSF12 is [missing], then CDART will leave item 4 blank. This means that the TSF needs to be updated to include the answer to TSF12.

Note: '**screening eligibility**' means that the participant is eligible based on the in-person screening criteria recorded on the HVS, MME6, and AAF. Also to be eligible, a participant must be interested in completing the study.

B. Baseline Visit Date and Time

Baseline Script:

"The screening test results indicate you are eligible to be further tested to participate in the ACHIEVE study. If these test results match the inclusion criteria for enrolling, you will be invited to enroll in the study." [If the participant has an eligible partner pair, say: "You and your partner must come to the baseline appointment together."

6. To answer this question, run the eligibility link in the RAN form in CDART to determine eligibility for baseline. Select 'N' when 1) a screened participant is ineligible as deemed by the eligibility report from the RAN form, or 2) the prescreened participant refuses the study at any time during the screening or baseline exam. You may record a reason for refusal in a notelog on the RSF6 field if one is given.

7 and 8. Record the appointment date and time for the in-person Baseline visit. This must be within 30 days of the in-person screening visit. Update the date and time of the baseline appointment when a screened participant either doesn't show for their baseline appointment or they reschedule the baseline appointment.