**Recruitment Phone Calls:**

***Guidance and Best Practices for Research Coordinators***

The purpose of this SOP is to provide guidance and best practices for recruiting research participants to clinical research studies. It is crucial to remember that telephone communication is the “first impression” that a potential research participant will have with your study team. Based on this call, the participant will draw conclusions about the professionalism of the research team, the quality of the research study, the attention to safety and privacy, and the commitment to customer service. You are representing both your own research study, and the entire VA research program. Therefore, each and every call deserves your full attention.

General guidance for phone screening:

* Use plain language. Avoid technical terms, acronyms, and abbreviations when possible.
* Use neutral wording to avoid biasing responses. For example, ask “Have you ever had a heart attack?” instead of “You’ve never had a heart attack, right?”
* Adapt your wording, rate of speaking, volume, etc. to accommodate the participant’s knowledge, language proficiency, hearing, etc.
* When reading from a script, it is helpful to explain this to participants. For example, you might say something like “*I want you to know that I am going to be reading from a script. I apologize if I sound robotic, but it’s important to ensure that I don’t miss any important points, and that I am consistent with the information that I provide to each caller.*”
* Don’t offer medical advice other than saying that it would be best for them to contact their own doctor for medical questions.
* Handle ineligibility with care. Never tell someone that they “failed” a screen. Simply explain that research studies have specific eligibility criteria, and they did not match with this particular study.
* If a participant discloses concerning mental health information (e.g., thoughts of suicide or violence) or has complaints about their VA healthcare, be prepared to refer them to appropriate sources for help.
* People participating in scientific research are doing a service, and often are agreeing to participate in procedures that are unfamiliar, difficult, and/or potentially uncomfortable (from a physical or mental perspective).They deserve your undivided attention.

# Creating a Recruitment Call Spreadsheet

1. Create a Recruitment Calls Spreadsheet using excel. (see spreadsheet on Research Service Webpage titled “Recruitment Call Example Spreadsheet” for a basic example that can be tailored your study needs)
   1. Name the spreadsheet clearly identifying the PI and the study.
      1. Example: Recruitment\_Sriram\_1234567
   2. Save spreadsheet in appropriate study folder in R: Drive
      1. Example: R:\Investigators\PI Name
   3. Specific to your study needs, create necessary tags and tabs to collect needed potential subject information and track mailings/calls
2. Subjects will be added to the first page of this spreadsheet when they are identified via pre-screening methods, study-provided recruitment lists, or physician referrals.
3. Recruitment letter mailing should be completed based on this list and per study protocol timelines
   1. Studies allowing for multiple mailings will require all mailing dates to be entered, whether this is done on the same page or individual pages will be up to your study team.
   2. Once a letter is mailed, enter the “Date Follow-up Call Needed” in the respective column for each participant.
      1. The timing of the initial follow-up call will depend upon study timelines and study team determinations. As a baseline, it is recommended to wait at least a week (7 days) to allow for the letter to arrive to subject and for them to respond.

# Preparing to Make Recruitment Calls

1. Navigate to your study directory
   1. E.g., Path: R:\Investigators\<PI Name>\<Study Name>
2. Open the Recruitment Call Spreadsheet for the study you will be completing calls for
3. Have a phone script ready for both if a potential subject answers the phone or if you will need to leave a voicemail.
4. Have any documentation needed for scheduling consent visits. For example, addresses of where to meet, instructions on how to get there, etc.
5. Unless necessary, put your cell phone, laptop, and anything else that could be distracting away while making calls.
   1. Your presence is communicated through your voice (tone, cadence, etc.) and people can tell if you’re being present with them.

# While Making Calls

* + - 1. For all calls you must dial 9 before the phone number.
  1. If the number is a 352-number then you dial the phone number after you press 9
  2. If the number is not a 352-number, you dial 91 and then the phone number

1. This is the flow of making calls:
   1. Call the person, they answer, and you go through the script
   2. Call the person, they do not answer you leave a message per the script
   3. Call the person, they do not answer, you cannot leave a message
   4. Regardless of the outcome, enter any relevant notes (e.g., “Call back someday after 5 pm, “Not interested”, “Interested, call back”, etc.”)
2. If someone is interested in coming to the site to attend an Informed Consent Visit:
   1. Let them know roughly how long the visit will take.
   2. Ask what the person’s weekly schedule is like.
   3. Check the calendars and room schedules to find times that works
      1. If there is only one time that works for the participant and the person running the visits, then schedule that time.
         1. If there are multiple potential times, offer the participant two choices. Many research participants have trouble with open ended questions and response better when given concrete options.
   4. Give people detailed instructions of who they will be meeting, where to meet them, what to bring, etc. If applicable, mail the participant a pre-visit informational packet (requires IRB approval).
   5. Let people know they will receive a reminder call/text before their informed consent visit containing the time and place and that they can call/text that number if they have any questions. This will vary by study.
   6. Fill out the time and date on the appropriate page of the screening form
   7. If someone else is running the study visits and/or you are using shared space, add the visit to that person’s calendar and reserve the shared space. Otherwise do this after you are done with all your calls.
3. If someone fails to meet all inclusion criteria or meet an exclusion criterion, stop at the question they failed at and thank them for their time. Follow the script.
4. If someone says something like “Can you call me after 5 pm?” and you know that a study team member will be available to make calls around that time, then say yes and contact the study team member to instruct them to make the call. Use closed loop communication to ensure that the call is completed, and that no potential participants fall through the cracks due to failure to follow up with them. Ensure to encrypt any emails when sending PHI.
   1. Otherwise say something like, “Nobody will be in at that time, is there a good time to try and reach you during our normal business hours?

# After Making Calls

1. If they passed pre-screening and an Informed Consent Visit was scheduled, enter the date scheduled on the call spreadsheet and enter any relevant notes.
   1. If someone screen failed, put why in the notes
2. Enter the Informed Consent Visit to the shared calendar your study team uses to track visits.
   1. Make sure if you are using the calendar through Outlook/Teams, you do not enter any PHI into the invite.
   2. Send the calendar invite to any staff members who will be required to attend the study visit.