



HCHS/SOL V2- Individual Eligibility form

ELE- QxQ

General Instructions

Individual Eligibility Form (ELE) is completed at the time of initial contact or on subsequent contact occasions with SOL-visit 2 participants. This form is designed to identify factors that may affect the participant's ability to complete a study visit 2. The ELE form will be used to document the scheduled appointment date and time for the second exam and will be used by the coordinating center to track recruitment at each center.

Each form should then be entered into the HCHS/SOL study data management system within 48-72 hours after collection. Note that weekly recruitment and scheduling reports that are being shared with the Steering Committee are generated every Monday based on data entered into the DMS by 9:00 a.m. PST.

When to complete the ELE

- Complete ELE at time of screening and V2 Scheduled call
- If participant reschedules, continue to update the ELE. If at some point they do not provide a new scheduling date, then leave the last scheduled date on the ELE and proceed to create an occurrence of ETF =3 '**Screened, Eligible, but V2 Not Scheduled**'.
- Participants invited to V2 that: Refused to participate=1, Ineligible=3, Agrees to participate=4.
- Participants who have Year 6 window closed and are lost to follow-up =2 (Unable to contact, status unknown). If you find them in the future you can update the ELE accordingly.

Refusal at time of V2 Scenarios

a) **No Forms or Procedures completed**

1. Complete **ELE** and **ETF** as V2 refused.
2. In **ETF** use code Letter(s) in Notes field to identify barriers to participation (see ETF QxQ for details).
3. Code **CHK31a=3** Refusal, use comment field for further clarification.
4. If participant would like to continue participating in AFU's or would like to be contacted in the future for related studies DO NOT complete **ICT**. See ICT QxQ for details.
5. If participant makes a hard refusal at time of V2, complete the **ICT** accordingly. See ICT QxQ for details.

b) **Some Forms or Procedures completed**

If participant refuses to continue participation after some questionnaires and/or procedures have been completed, it would be coded as a partial.

1. Complete **ICT**, See ICT QxQ for details.
2. Code **CHK31a=2** (Partial)

Questions 1 – 2 obtain information on reasons why a person is not eligible. In order to assess multiple reasons for ineligibility all questions are asked of each respondent, regardless of the response given. Actual individual participation status is recorded in Question 3 for administrative purposes. This question is not to be read to participants. The date and time of the scheduled clinic visit for those respondents who are eligible and agree to participate are noted in Questions 4a and 4b

QxQ Instructions

Q1 Do you prefer to communicate in **Spanish or English?**

This question asks the respondent his/her language of preference. Mark language of preference.

If the respondent does not feel comfortable communicating in either Spanish or English, the person is ineligible (select "0" for neither language). Thank them for their time, ineligible closing script. Code Q3= "3" (ineligible).

If a person responds, "It does not matter", probe further to determine his/her language of preference. Mark either Spanish or English. Continue to Q2.

- Q2** Do you have any **plans to move away** from this area in the next 6 months (more than 100 miles at San Diego and Chicago, or more than 250 miles at Bronx and Miami)?

The definition of "out of area" differs for each site (see form for specific details). Record "yes" or "no". If the person reports that he/she has plans to move out of the defined area, the person can still participate. Mark the appropriate response and continue to Q3.

- Q3** Individual **Participation Status:**

This question is for administrative purposes only. It is a status code for the individual level eligibility.

Code	Description
1.	Refused screen, eligibility not confirmed – respondent is a hard refusal and will not agree to the eligibility screen so that their status can be confirmed. Respondent has completed the ELE fully and is considered eligible, but the person refuses to participate.
2.	Unable to contact, eligibility not confirmed – NO contact has been made after the required number of attempts to contact this individual and his/her individual eligibility status is unknown.
3.	Ineligible- completed screen, but ineligible – respondent is ineligible due to a response on Q1 – Q2 that has established that the individual does not fully meet eligibility criteria.
4.	Eligible, agrees to participate – Respondent is eligible at the individual level and agrees to participate. If person is eligible and agrees to participate, go to 4a to schedule clinic visit.

All FINAL CODES in the **ELE** should pair correctly with final codes in the **ETF**. Use reference table below for correct pairing of final codes in these forms.

Final Code reference table for ELE and ETF

ELE Codes	ETF Codes
1=Refuses to participate	5=Contacted, Refused to participate
2=Unable to contact, status unknown	7=Unknown
3=Ineligible	4=Screened and Not eligible for V2
4=Agrees to participate	2=Screened, Eligible, and V2 Exam Scheduled

Q4a Appointment **Date** (mm/dd/yyyy):

Set appointment date and record with two digit month, two digit day, and four digit year.

Note: If participant reschedules, continue to update the ELE. If at some point they do not provide a new scheduling date, then leave the last scheduled date on the ELE and proceed to create an occurrence of ETF =3 '**Screened, Eligible, but V2 Not Scheduled**'.

Q4b Appointment **Time**:

Set appointment time and record with two digit hour and two digit minute. Record "am/pm" in the spaces provided.

Note: If participant reschedules, continue to update the ELE. If at some point they do not provide a new scheduling date/time, then leave the last scheduled date/time on the ELE and proceed to create an occurrence of ETF =3 '**Screened, Eligible, but V2 Not Scheduled**'.