HCHS/SOL Phone Eligibility & Enrollment Report Guide

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General Instructions

The HCHS/SOL Phone Eligibility & Enrollment Report is a multi-purpose tool designed to assist project staff. Key capabilities of the report include the following.

1. Generating a list of participants who need to be contacted for one or more phone-based assessments (see Scenario One).
2. Generating a list of participants who need to be contacted for a specific phone-based assessment (see Scenario Two).
3. Identifying which phone-based assessments need to be administered to a specific participant (see Scenario Three).

Each of these options will generate a report which consists of (1) Participant Information, (2) Recruitment Information, and (3) Assessment Information (see sections below for details).

Scenario One

To generate a list of participants who need to be contacted for one or more phone-based assessments complete the following steps.

1. Select 'Phone Eligibility & Enrollment Report'.
2. Click 'Ok' to generate the report.

Scenario Two

To generate a list of participants who need to be contacted for a specific phone-based assessment complete the following steps.

1. Select 'Phone Eligibility & Enrollment Report'.
2. Select the appropriate assessment underneath the *Select Assessment of Interest* menu option.
3. Click 'Ok' to generate the report.

Scenario Three

Prior to contacting a participant, it may help to identify which phone-based assessments need to be administered. This can be accomplished by completing the following steps.

1. Select 'Phone Eligibility & Enrollment Report'.
2. Select 'Yes' underneath the *Run Report for Single Participant* menu option.
3. Enter the ID of the participant underneath the *Enter ID* menu option.
4. Click 'Ok' to generate the report.

Participant Information

The first set of fields in the report provide information about the participant.

- ID – The Subject ID of the participant. If the participant has been transferred between field sites, the transfer ID will be provided and the transition between sites will be described.
- Last Names – The last names of the participant. The paternal, maternal, and legal last name will be provided when available.
- First Name – The first name of the participant.
- Gender – The gender of the participant.
- Current Age – The age of the participant on the day the report was generated.
- Language – The preferred language of the participant based on information from Visit 2 and Visit 1.

- Date of Death – If the participant is known to be deceased and their date of death has been cataloged that date will be listed.
- Phone – The most recently recorded phone numbers of the participant.
- Proxy at V2 – An indicator specifying whether a proxy was required during Visit 2.

Recruitment Information

The next set of fields provide information about which participants should be contacted and the order in which phone-based assessment should be completed. In most situations, these fields will be blank so that each site can develop a customized approach.

- Priority – If there are specific groups of participants that should be prioritized then pertinent information will be listed.
- Sequence – If there is a specific sequence in which the phone-based assessments should be conducted then that sequence will be listed.

Assessment Information

The final set of fields provide information about each assessment.

- AFU – Information about the annual follow-up. This includes (1) the most recent AFU attempted, (2) the date of the most recent AFU contact attempt, (3) the status of the most recent AFU contact attempt, and (4) whether the AFU was performed over the phone, at a clinic, or during a home visit.
- COVID-19 – Information about the COVID-19 check-in calls. This includes (1) whether the participant or a respondent need to be called, (2) the status of the COVID-19 Psychosocial Check-In, (3) the date and time of the COVID-19 Psychosocial Check-In if an appointment has been scheduled, (4) the status of the COVID-19 Questionnaire, and (5) the date and time of the COVID-19 Questionnaire if an appointment has been scheduled.
- Visit 3 Call – Information about the Visit 3 phone assessments. This includes (1) the wave the participant was assigned to for Visit 3, (2) the status of the phone assessment, and (3) the date and time of the assessment if an appointment has been scheduled.