



# HCHS/SOL Question by Question Instructions, Household Screening Form (HSR), Version B

## General Instructions

The household screening and roster information for HSR version B is available through hand held devices. Each device has the capability to manage field recruitment efforts electronically without using paper forms. Household addresses and Household ID Numbers are provided by the Coordinating Center directly to each Field Center. In addition, numbers for *selection p* and *cut-point c* are calculated via a sampling algorithm in real time during screening. These values are automatically filled into the appropriate fields on the HSRB record (see HCHS Recruitment Data Management System Users Guide). Both English and Spanish language scripts that are to be used when completing this form can be found in the Recruiter's Manual. Note the scripts have been modified from the first version to use with this form.

The screening questions refer to individuals who are living in the household at the time and date of the recruitment visit or call. Please record all responses by respondent directly on the hand held device. All information should be uploaded to the HCHS/SOL study data management system within 48-72 hours after collection. When a wireless internet connection is available, data will automatically upload to the study DMS. To insure data is uploading properly, it is suggested that recruitment staff review the study DMS after upload to check on the status report for the latest transfer of household screening information to the forms server.

Note that weekly screening and recruitment reports that are being shared with the Steering Committee are generated every Monday based on data that is in the DMS by 9:00 a.m. PST (noon Eastern).

## Question by Question Instructions

Q1 This question asks if anyone lives in the household who is Hispanic or Latino. The populations of interest for HCHS/SOL are persons or descendants of persons from Cuba, Mexico, Puerto Rico, and Spanish speaking countries in the Caribbean and Central and South America. A complete list of countries of interest is provided in Appendix I. This list is provided as a reference tool for recruiters and is NOT to be read during actual recruitment visits nor shown to respondents.

If a person states that he/she is not Hispanic or Latino but states that he/she is from or a descendant of one of the countries of interest for HCHS/SOL, the recruiter can further define the population of interest to HCHS/SOL to the respondent with the following statement: "The focus of HCHS/SOL is on persons or descendants of persons from Cuba, Mexico, Puerto Rico, and Spanish speaking countries in the Caribbean and Central and South America. According to this, does anyone live in this household who is Hispanic/Latino?"

"Living in the household" is defined as anyone who resides at the sampled address and considers the address their permanent residence, regardless of their relationship to others who may be living at the same address. College students who still consider the address their permanent residence meet this eligibility recruitment. An exception to this definition is individuals on active military duty. Persons on active military duty who still consider the sampled address their permanent

residence do not meet this eligibility requirement and are NOT eligible for participation in HCHS/SOL.

If there are not any Hispanic/Latino persons living in the household, read closing script and end recruitment. If there are 1 or more Hispanic/Latino persons living in the household, continue to Q2.

- Q2 The question asks for the TOTAL number of people who live in the household who are Hispanic/Latino. This number should include all individuals, and not just those who meet the age requirements to be eligible to participate in HCHS/SOL. Enter the number of persons as a two digit value, i.e. 01, 05, etc...

If the respondent reports that there are no, zero (00), persons of Hispanic/Latino origin living in the household, read closing script and end recruitment. If the respondent reports 01 person or more, then continue to Q3.

- Q3 The question asks the respondent to report how many of the Hispanic/Latino people living in the household are between the ages of 18 – 74 years. Age is determined at the actual time and date of the initial contact. For example, if someone is going to turn 18 in 1 week, he/she is not eligible to participate. Likewise if someone is going to be 75 in a week, at the time of the screening interview he/she is 74 and is considered to be eligible. Enter number in a two digit value, i.e. 01, 05, etc...

If respondent reports that none of the Hispanic/Latino individuals living in the household are between the ages of 18 – 74, read closing script and end recruitment. If the person reports 1 or more Hispanic/Latino persons between the ages of 18-74, continue to Q3a.

- Q3a The text for this question is NOT intended to be read to the respondent, but rather contains instructions for the interviewer. To determine the random selection value when using the handheld device, pass your stylus through (stroke or slash) the box labeled Calculate Selection. The display only selection and cut point text boxes will automatically fill. Also, the checkbox for question 3a, the result of  $p < c$ , will be filled with the correct response by the computer. A message box showing the selection status of this household will be displayed. Press OK on the message box to clear it from the screen. The appropriate script to use for Q4, the roster, will appear on the screen and guide the interviewer as to who in the HH should be invited to participate.

If *selection p* is LESS THAN *cut-point c*, the whole Hispanic/Latino household has been selected to participate. The interviewer will read script B and continue to the roster. If *selection p* is GREATER THAN or EQUAL TO *cut-point c*, only those individuals between the ages of 45 and 74 are invited to participate. The interviewer will read script A and continue to the roster. Here are the selection rules and scripts to use:

If  $p < c$ , whole HH is invited to participate (script B)

If  $p \geq c$ , only 45 – 74 year olds are invited to participate (script A)

Roster Read the script exactly as it appears on the screen. When completing the roster make sure to capture the information on all eligible persons living in the household who are Hispanic/Latino and are in the appropriate age group (based on Q3a). The respondent is the first person rostered, person A.

First Name: Enter one letter in each box. It is not necessary to record each letter of the first name; interviewers may record only the first 4 letters of the first name. However, it is important to record enough information so that when the person is contacted for scheduling or goes to the clinic, he/she can be correctly identified. (If the full name is not entered here, the sites will need to update these records later in their local tracking system. If the use wants to enter the information only once, then the full name should be captured. This data is encrypted and does not become part of the collaborative study database)

Last Name: Enter one letter in each box. It is not necessary to record each letter of the last name; interviewers may record only the first 5 letters of the last name. As with the first name, it is important to record enough information so that when the person is contacted for scheduling or goes to the clinic, he/she can be correctly identified.

Gender: Enter either M (male) or F (female).

Age: Enter the two digit age.

Relationship to respondent: Ask respondent for the relationship that he/she has with each person that is being rostered. With the drop down menu, use the numerical codes to identify each type of relationship. The respondent is the first person rostered, and has the numerical code "01". Choose the appropriate two digit numerical code from the drop down list for other rostered individuals. Please note the list of relationships is not exhaustive. If the relationship is not listed, it is considered "other".

Telephone number: Ask the respondent for his/her telephone number (including area code). If other members of the household who are being rostered are present at the time of contact, obtain their phone numbers also.

It is possible that households will have a "general" household phone number and household members will have individual cell phone numbers. If this is the case, ask the person for the number that is the best one to reach them. Record this number as the main contact phone number on the roster.

Case code: This number is used for information obtained on the person being rostered at the time of initial contact. This information may or may not be captured at the time of initial recruitment. If information is captured, use the drop down menu to select the numerical code for the situation/status listed.

Non-English AND non-Spanish speaker – Refers to a person who is unable to verbally communicate in either English or Spanish. Note: this does not include the hearing impaired.

Active military – Refers to a person who is currently in active military duty.

Moving away – Refers to a person who has plans to move out of the recruitment area within the next 6 months. Distances are: more than 100 miles/160 kilometers at San

Diego and Chicago, more than 250 miles/400 kilometers at Bronx, or out of Miami -Dade County in Miami.

Homebound – Refers to a person who is unable to leave the home for a clinic visit.

Refusal – Refers to a person who at the time of initial contact states that he/she does not want to participate in the HCHS/SOL study.

Individual eligibility pending – Code is used if eligibility for the person is yet to be determined at initial contact.

Individual eligibility determined – Code is used if eligibility for the person was determined at initial contact. This means that the Individual Eligibility Form (ELE) was completed.

## Appendix I – HCHS/SOL Countries of Interest

### **Caribbean**

Cuba  
Dominican Republic  
Puerto Rico

### **Central America**

Costa Rica  
Guatemala  
Honduras  
El Salvador  
Nicaragua  
Panama

### **North America**

Mexico

### **South America**

Argentina  
Bolivia  
Chile  
Colombia  
Ecuador  
Paraguay  
Peru  
Uruguay  
Venezuela