

Annual Interview and Finger Poke Protocol Kit Procedure

Annual Interview

1. Mass text the identified Past Due participants, to notify they will be contacted to complete the Annual Update Interview by phone
2. Add Clinic Track to those participants
3. Time frame for first contact to schedule or conduct the Interview-1 week
4. Number of contacts, time frame to get a response-3 attempts over 1 month
5. If **Unable to Complete** Annual Interview, update in Web App:
 - a. Look up participant, select "Scheduling" tab
 - b. Scroll down to Date Due section
 - c. Enter detail into Visit Comment box
 - 1) "Unable to complete Annual Intvw 2020, update Date Due to "date" (which should be same month/day as current Date Due but year 2021)
 - d. Enter date into "Take off Sched Due List until" , date should be 1 month prior to date just indicated in the Visit Comment box
 - e. Enter date into "Take Off Mass Scheduling Until", date should be same as "Take off Sched Due List Until" date
 - f. Click "Save Reminder Call and Visit Comment" button
 - g. Participant should come off the Subject Past Due list
 - h. Go on to the next participant on your list
 - i. Return all "incomplete" paper interview documents to Kathy Waugh
6. If **Annual Interview Completed**, update Web App:
 - a. Notify participant/parent of Finger Poke option, ask about interest
 - 1) If **not interested**:
 - a) Go to Subject tab and Select "No" from the Finger Stick Protocol dropdown
 - b) Go to the Scheduling tab and enter detail into Visit Comment box:
 1. "Annual Intvw completed 2020, update Date Due to "date" (which should be same month/day as current Date Due but year 2021)
 2. Enter date into "Take off Sched Due List until" , date should be 1 month prior to date just indicated in the Visit Comment box
 3. Enter date into "Take Off Mass Scheduling Until", date should be same as "Take off Sched Due List Until" date
 4. Click "Save Reminder Call and Visit Comment" button
 5. Enter into the Call Record, date interview was completed and initials who conducted interview
 - c) Participant should come off the Subject Past Due list
 - 2) If **Interested in FPP**:
 - a) Go to Subject tab and Select "Yes" from the Finger Stick Protocol dropdown
 - b) Send email with Finger Poke Video to participant and/or parent email address
 - c) Initiate Finger Poke Kit
 1. Go to FFQ/Filter Paper tab

2. Select the New Blood Kits subtab to create finger poke kit request
3. Select "Finger Poke" from the Kit Type dropdown
4. Enter the date
5. Select the Visit Type (Every year if Ab-Neg)
6. Select "Yes" from the FFQ Sent? Dropdown
7. Select "YAQ" from the FFQ Type dropdown
8. Click the "Send New Blood Kit" button
- d) Enter into the Call Record, date interview was completed and initials who conducted interview
- e) Participant will remain on the Subject Past Due list, but the Finger Stick field will be "Yes" and the Max Interview date should reflect the date of the interview just completed

Finger Poke Kit & Diet Forms Tracking

1. Open Subject Past Due report
 - a. From DAISY web app Home page, select Scheduling from the left menu, then Subjects Due
 - b. Select Past Due from the list of report options
 - c. Enter Yes in the blank field under the Finger Stick column-you can also search for a specific Subject ID by entering the ID number in the blank field of the ID column heading-this generates a Date Due
 - d. Click on a specific Subject ID number to go to the Subject's records
 - e. Select the FFQ/Filter Paper tab and select the LD/FFQ Outcome Data Entry subtab
 - f. RED Banner will show up if subject has turned 18 yrs old since last consent was signed-
include a consent with the FPP kit
 - g. Enter all the appropriate data in order to track the kit to be sent out:
 - 1) Date Sent (update to current date)
 - 2) FedEx Tracking Number (outgoing)
 - 3) Kit Expiration (approximately 4 weeks after send date-can be changed if WE don't do our follow-up in a timely manner)
 - 4) FedEx Return Number (incoming)
 - 5) You can still add the FFQ if not added during the request
 - 6) Click Save Blood Collection Changes and Save FFQ Changes (if added)
2. Prepare and send Finger Poke Kit and appropriate paperwork (see DAISY Finger Poke Protocol)
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3. Tracking contact attempts
 - a. Go to the subject's FFQ/Filter Paper tab, select the Call Tracking subtab
 - b. To add a contact attempt for the Finger Poke kit select the Long Distance Call option
 - c. #Called: select which number you tried in order to contact or email
 - d. Call Outcome: select texted, sent email, machine message (if called)-ONLY select CONTACTED if you received some direct response
 - e. LD/FFQ Call Result: Reminder message
 - f. Enter any specific details in the Comments field, such as if date to send indicated

- g. Click on the Save Contact Attempt button
 - 1) Your initials will automatically be saved
 - 2) This update the "All Outstanding Blood Kits" report under the Last Call column
- 4. Tracking Outstanding Finger Poke kits
 - a. Go to DAISY Home page
 - b. Scroll down to Long Distance/FFQ from the left menu, then select Call Tracking
 - c. Select "All Outstanding Blood Kits" from the Calls Needed options
 - d. Filter the report by entering Finger poke in the blank field under Kit Type
 - e. If there is no LD Tracking Number entered, the kit has not been sent (the request has only been completed)
 - f. Important information to check:
 - 1) Date sent
 - 2) Date Due
 - 3) Last Call
 - g. If past the Date Due and 3 contact attempts have been made, the kit Outcome and FFQ Outcome should be updated to Not Received
 - 1) Not sure if the Subject's Date Due will be updated or if the Take Off Sched Due List needs to be updated
- 5. Finger Poke Kits received
 - a. Go to the Subject's page in the web app
 - b. Select the FFQ/Filter Paper tab and select the LD/FFQ Outcome Data Entry subtab
 - c. Enter the blood kits Outcome from dropdown-Received and Outcome Date (a clinic visit sheet print prompt will pop up)
 - d. Enter the FFQ Received and Date if YAQ included in the returned kit
 - e. Process the blood sample and add a Clinic Visit, complete appropriate data, including height, weight, and consent.
 - f. FFQ and Diet Survey go to basket in Records Room
 - g. W9 goes to DAISY Project manager mailbox