



Guidelines and Strategies for Maximizing Follow-up Form

04/01/2009

Attempt at follow-up should begin on the follow-up window open date. If the data collector cannot reach a subject after 2 weeks of attempted contact, methods 1-9 are to be employed until the subject is reached or until the window closes. Methods 1-9 are the minimum expectations to be employed to find and interview participants. These methods can be applied in any sequence to best fit the circumstances of each center. As of 1/1/07, this form must be completed and kept on file at the center for every participant that is entered into the National Database as lost to follow-up. The "Additional Strategies" on pages 4 & 5 are recommended for each site to consider as it applies to them, but are not required.

PROCEDURE for FOLLOW UP CONTACT

Window Opens: ___/___/___ **Window Closes:** ___/___/___ **Subject ID #:** _____

1. PHONE CONTACT Not Applicable No Good Phone Numbers Success?

| | Staff initials | Date completed |
|--|----------------|----------------|
| 4 attempts during normal business hours (at different times of the day) | _____ | _____ |
| 4 attempts during weekday evenings (on different days of the week) | _____ | _____ |
| 4 attempts during weekends | _____ | _____ |

2. DIRECTORY ASSISTANCE Success?

Call directory assistance (411) in last known city of residence, and surrounding areas, to obtain updated information about subject and contacts.

3. INTERNET SITES Success?

Superpages.com, Anywho.com, theultimates.com

Search engines (ex., Google and Yahoo)



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4. SEND LETTER TO SUBJECT and CONTACTS Success?

Letter to subject at last known address _____

Letter to contacts at last known address _____

Send all letters via first class mail, marked 'Forwarding & Address Correction Requested', so that you can make note of any address changes.

5. HOSPITAL INFORMATION/MEDICAL RECORDS Success?

| | | |
|---|----------------|----------------|
| | Staff initials | Date completed |
| Check for post-discharge contact and updated information in the outpatient section of medical record. | _____ | _____ |
| Check appointment schedules, outpatient clinic lists, and/or other hospital database for new information. | _____ | _____ |

6. CONSULT HOSPITAL STAFF INVOLVED WITH PATIENT Success?

Ask social workers, clinic staff, and other hospital employees involved with the subject's care for additional or updated information. _____

7. DEATH SEARCH Success?

Contact Social Security Administration at (800) 772-1213 _____
or <http://ssdi.rootsweb.ancestry.com/>

- need SS #
- Determine subject's living status

Local online newspaper obituary search _____

8. INMATE SEARCH Success?

County Jail _____

State Prison – Department of Corrections

- See appendix L, Online Offender Databases _____
- Info required: full name and either SS# or DOB

Federal Prison System

- (202) 307-3126
- Call 10:30am to 4:30PM EST
- Info required: full name, DOB, and SS# _____



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9. LOCATION SERVICES

Success?

Accurint and/or Comserv are recommended by many sites (there is a fee involved for these services). _____

UPDATED CONTACT INFORMATION

PATIENT INFORMATION

Street Address: _____

City, State, Zip: _____

Home #: _____ Cell #: _____ Work #: _____

Email address: _____

Additional Comments/Information: _____

CONTACT INFORMATION

Name/Relation to subject: _____

Street Address: _____

City, State, Zip: _____

Home #: _____ Cell #: _____ Work #: _____

Email address: _____

Additional Comments/Information: _____



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CONTACT INFORMATION

Name/Relation to subject: _____

Street Address: _____

City, State, Zip: _____

Home #: _____ Cell #: _____ Work #: _____

Email address: _____

AdditionalComments/Info: _____

ADDITIONAL STRATEGIES FOR MAXIMIZING FOLLOW UP CONTACT

Before Discharge from Rehabilitation Facility

- Ask participant to tell his/her contacts that the study site has been given their name, the reasons why, and that they may be contacted in the future.
- Give business cards, magnet, or pens with logo/name of site to participant and/or contacts.
- Note the participant's professional organizations (bar associations, licensures, etc.)
- Ask for a current list of healthcare providers for participant, especially primary care physician. Obtain permission/signed release forms from the subject if assistance in information gathering is needed in the future.

Hospital Contacts

- Contact billing office and/or hospital pharmacy for recent contact information and address changes.
- Work with doctors to schedule rehab appointments that will coincide with follow up windows.
- Regularly check clinic appointment schedules for opportunities to make contact with subject. Even if window is not open at the time of the clinic visit, this is a good time to confirm current contact information and just say hello.



Possible Contact Updates

- **Contact Voter Registration/Electoral Registries**
- **Contact Public Health Nurses in last known county of residence.**
- **Contact VNA (Visiting Nurse Association) or CCS (California Children's Services – participant must be 18 or under at time of injury) if available in your area.**
- **Check nursing homes in last known area of residence.**
- **Contact the Vital Statistics Department/Registry of Births, Deaths, and Marriages (there is a fee to obtain this information) <http://www.vitalrec.com/>**

Phone/Mail Contact

- **Mail reminder cards a few weeks before window opens, to let them know they will be hearing from you soon.**
- **Send 'attempt to contact' letters via Certified mail.**
- **Ask rehab doctor for updated contact information, and/or have doctor contact via mail/phone.**
- **During follow up calls, ask participant if they have plans to move, or any new contact information, such as a new work, cell phone number, or email address.**
- **When attempting to reach participant by phone for follow up data collection, use a land line with a TBI Model System Identifier, rather than using a cell phone or a blocked identifier (as is the case with many hospital lines).**
- **Have the same staff member complete all follow up calls, in the interest of building rapport and trust between the data collector and the subject. If possible, have the person who consented the subject also complete that subject's follow up.**

Other methods

- **Develop monthly or quarterly newsletters for distribution to all the subjects enrolled in your site. Send these via first class mail, so that they will be returned to your site with changed address information.**
- **Send birthday and/or holiday cards (also sent first class).**
- **Give gift certificates or monetary rewards for completing follow up data collection, or for notifying site of an address/phone number change.**
- **Discuss status of subject tracking at weekly/monthly meetings. Review call attempts, lost subjects, open and closed windows, and additional strategies for data collection.**
- **Call on a rainy day (especially Saturday)!**