California Precision Medicine Consortium

🏠 **Project Home**   ☰ **Project Setup**   ✍ **Online Designer**   📊 **Data Dictionary**   📖 **Codebook**

📷 Create snapshot of instruments   🎞 VIDEO: How to use this page

Last snapshot: never ?

This page allows you to build and customize your data collection instruments one field at a time. You may add new fields or edit existing ones. New fields may be added by clicking the Add Field buttons. You can begin editing an existing field by clicking on the ✏ **Edit** icon. If you decide that you do not want to keep a field, you can simply delete it by clicking on the ❌ **Delete** icon. To reorder the fields, simply **drag and drop** a field to a different position within the form below. NOTE: While in development status, all field changes will take effect immediately in real time. Are you using Action Tags yet? If not, learn about Action Tags here.

◀ Return to list of instruments

Current instrument: **12. Retention Contacts**

Preview instrument

Add Field   Add Matrix of Fields

✏ ❌

CONTACT #1

PARTICIPANT NAME: [last_name], [first_name]

DATE OF BIRTH: [dob]

PREFERRED METHOD(S) OF CONTACT: [preferred_methods_of_contact]

PHONE NUMBER: [phone_number]

NEW/CORRECTED PHONE NUMBER: [new_phone_number]

EMAIL ADDRESS: [email_address]

NEW/CORRECTED EMAIL ADDRESS: [new_email_address]

PREFERRED LANGUAGE: [preferred_language]

UPDATED LANGUAGE PREFERENCE: [new_preferred_language]

STUDY COMPLETED ON: [gift_card_participant_signature_date]

UPCOMING CLINIC APPOINTMENT: [appointment_clinic], [appointment_date] [appointment_time]

Email Instructions in English to [email_address], or to [new_email_address] (if new email is available)

Email Instructions in Spanish to [email_address], or to [new_email_address] (if new email is available)

Add Field   Add Matrix of Fields

✏ 📋 🌿 📑 ❌   *Variable:* retention_contact_1_date_time

Retention contact #1 date and time

[   ] 📅🕐 [Now] M-D-Y H:M

Add Field   Add Matrix of Fields

Variable: retention_contact_1_crc

Who made retention contact #1?

- ○ Aimee Nguyen
- ○ Antonio Salgado
- ○ Ashley Athanas
- ○ Emily Hur
- ○ Eric Gonzalez
- ○ Erin Saltmarsh
- ○ Irena Chuchev
- ○ Joel Flores
- ○ Justin Choi
- ○ Justin Lopez
- ○ Linda Wright
- ○ Maribel Perez
- ○ Nicolas Gonzalez

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_1_outcomes

Retention contact #1 outcomes

- ○ Called, spoke with the prospective participant
- ○ Called, spoke with someone else
- ○ Called, no answer, left voicemail
- ○ Called, no answer, and no voicemail or voicemail full
- ○ Called, wrong # (if available, specify alternative phone # in "new or corrected phone number" on Form 3)
- ○ Retention instruction email sent
- ○ Email rejected (if available, specify alternative email address in "new or corrected email address" on Form 3)
- ○ Neither phone # nor email address is available
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_1_request

Retention contact #2 request (if applicable)

- ○ To be contacted later by text
- ○ Busy, but interested and wished to be called back later
- ○ To have a password reset email sent and will complete the surveys later on their own
- ○ To update their email
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_1_decision   *Branching logic:* [retention_contact_1_outcomes] = 'called_spoke_with_participant...

Retention contact #1 decision

- ○ Agreed to complete followup surveys on their own
- ○ Agreed to schedule an appointment to complete followup surveys
- ○ Declined to do
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_1_notes

Retention contact #1 notes

> [text area box]
>
> Expand

Add Field   Add Matrix of Fields

🖉 📋 ⌑ 📑 ✖   *Variable:* retention_contact_2   *Branching logic:* [retention_contact_1_date_time] <> ''

Add retention contact #2?

☐ Yes

Add Field   Add Matrix of Fields

🖉 ✖

CONTACT #2

PARTICIPANT NAME: [last_name], [first_name]

DATE OF BIRTH: [dob]

PREFERRED METHOD(S) OF CONTACT: [preferred_methods_of_contact]

PHONE NUMBER: [phone_number]

NEW/CORRECTED PHONE NUMBER: [new_phone_number]

EMAIL ADDRESS: [email_address]

NEW/CORRECTED EMAIL ADDRESS: [new_email_address]

PREFERRED LANGUAGE: [preferred_language]

UPDATED LANGUAGE PREFERENCE: [new_preferred_language]

STUDY COMPLETED ON: [gift_card_participant_signature_date]

UPCOMING CLINIC APPOINTMENT: [appointment_clinic], [appointment_date] [appointment_time]

Email Instructions in English to [email_address], or to [new_email_address] (if new email is available)

Email Instructions in Spanish to [email_address], or to [new_email_address] (if new email is available)

Add Field   Add Matrix of Fields

🖉 📋 ⌑ 📑 ✖   *Variable:* retention_contact_2_date_time   *Branching logic:* [retention_contact_2(yes)] = 1

Retention contact #2 date and time

[   ] 📅🕐 [Now]   M-D-Y H:M

Add Field   Add Matrix of Fields

🖉 📋 ⌑ 📑 ✖   *Variable:* retention_contact_2_crc   *Branching logic:* [retention_contact_2(yes)] = 1

Who made retention contact #2?

○ Aimee Nguyen
○ Antonio Salgado

- ○ Ashley Athanas
- ○ Emily Hur
- ○ Eric Gonzalez
- ○ Erin Saltmarsh
- ○ Irena Chuchev
- ○ Joel Flores
- ○ Justin Choi
- ○ Justin Lopez
- ○ Linda Wright
- ○ Maribel Perez
- ○ Nicolas Gonzalez

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_2_outcomes   *Branching logic:* [retention_contact_2(yes)] = 1

Retention contact #2 outcomes

- ○ Called, spoke with the prospective participant
- ○ Called, spoke with someone else
- ○ Called, no answer, left voicemail
- ○ Called, no answer, and no voicemail or voicemail full
- ○ Called, wrong # (if available, specify alternative phone # in "new or corrected phone number" on Form 3)
- ○ Retention instruction email sent
- ○ Email rejected (if available, specify alternative email address in "new or corrected email address" on Form 3)
- ○ Neither phone # nor email address is available
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_2_request   *Branching logic:* [retention_contact_2(yes)] = 1 AND ([retention_contact_2_outcom…

Retention contact #2 request (if applicable)

- ○ To be contacted later by text
- ○ Busy, but interested and wished to be called back later
- ○ To have a password reset email sent and will complete the surveys later on their own
- ○ To update their email
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_2_decision   *Branching logic:* [retention_contact_2(yes)] = 1 AND ([retention_contact_2_outcom…

Retention contact #2 decision

- ○ Agreed to complete followup surveys on their own
- ○ Agreed to schedule an appointment to complete followup surveys
- ○ Declined to do
- ○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_2_notes   *Branching logic:* [retention_contact_2(yes)] = 1

Retention contact #2 notes

Expand

Add Field   Add Matrix of Fields

Variable: retention_contact_3   *Branching logic:* [retention_contact_2_date_time] <> ''

Add retention contact #3?

☐ Yes

[Add Field] [Add Matrix of Fields]

CONTACT #3

PARTICIPANT NAME: [last_name], [first_name]

DATE OF BIRTH: [dob]

PREFERRED METHOD(S) OF CONTACT: [preferred_methods_of_contact]

PHONE NUMBER: [phone_number]

NEW/CORRECTED PHONE NUMBER: [new_phone_number]

EMAIL ADDRESS: [email_address]

NEW/CORRECTED EMAIL ADDRESS: [new_email_address]

PREFERRED LANGUAGE: [preferred_language]

UPDATED LANGUAGE PREFERENCE: [new_preferred_language]

STUDY COMPLETED ON: [gift_card_participant_signature_date]

UPCOMING CLINIC APPOINTMENT: [appointment_clinic], [appointment_date] [appointment_time]

Email Instructions in English to [email_address], or to [new_email_address] (if new email is available)

Email Instructions in Spanish to [email_address], or to [new_email_address] (if new email is available)

[Add Field] [Add Matrix of Fields]

Variable: retention_contact_3_date_time   *Branching logic:* [retention_contact_3(yes)] = 1

Retention contact #3 date and time

[_____] 📅🕐 [Now] M-D-Y H:M

[Add Field] [Add Matrix of Fields]

Variable: retention_contact_3_crc   *Branching logic:* [retention_contact_3(yes)] = 1

Who made retention contact #3?

○ Aimee Nguyen
○ Antonio Salgado
○ Ashley Athanas
○ Emily Hur
○ Eric Gonzalez
○ Erin Saltmarsh
○ Irena Chuchev
○ Joel Flores
○ Justin Choi
○ Justin Lopez
○ Linda Wright

○ Maribel Perez
○ Nicolas Gonzalez

reset

[Add Field] [Add Matrix of Fields]

🖉 📋 ⌐ 🗗 ✖ *Variable:* retention_contact_3_outcomes *Branching logic:* [retention_contact_3(yes)] = 1

Retention contact #3 outcomes

○ Called, spoke with the prospective participant
○ Called, spoke with someone else
○ Called, no answer, left voicemail
○ Called, no answer, and no voicemail or voicemail full
○ Called, wrong # (if available, specify alternative phone # in "new or corrected phone number" on Form 3)
○ Retention instruction email sent
○ Email rejected (if available, specify alternative email address in "new or corrected email address" on Form 3)
○ Neither phone # nor email address is available
○ Other (specify in notes below)

reset

[Add Field] [Add Matrix of Fields]

🖉 📋 ⌐ 🗗 ✖ *Variable:* retention_contact_3_request *Branching logic:* [retention_contact_3(yes)] = 1

Retention contact #3 request (if applicable)

○ To be contacted later by text
○ Busy, but interested and wished to be called back later
○ To have a password reset email sent and will complete the surveys later on their own
○ To update their email
○ Other (specify in notes below)

reset

[Add Field] [Add Matrix of Fields]

🖉 📋 ⌐ 🗗 ✖ *Variable:* retention_contact_3_decision *Branching logic:* [retention_contact_3(yes)] = 1 AND ([retention_contact_3_outcom…

Retention contact #3 decision

○ Agreed to complete followup surveys on their own
○ Agreed to schedule an appointment to complete followup surveys
○ Declined to do
○ Other (specify in notes below)

reset

[Add Field] [Add Matrix of Fields]

🖉 📋 ⌐ 🗗 ✖ *Variable:* retention_contact_3_notes *Branching logic:* [retention_contact_3(yes)] = 1

Retention contact #3 notes

Expand

[Add Field] [Add Matrix of Fields]

🖉 📋 ⌐ 🗗 ✖ *Variable:* retention_contact_4 *Branching logic:* [retention_contact_3_date_time] <> ''

Add retention contact #4?

☐ Yes

[Add Field] [Add Matrix of Fields]

🖉 ✖

CONTACT #4

PARTICIPANT NAME: [last_name], [first_name]

DATE OF BIRTH: [dob]

PREFERRED METHOD(S) OF CONTACT: [preferred_methods_of_contact]

PHONE NUMBER: [phone_number]

NEW/CORRECTED PHONE NUMBER: [new_phone_number]

EMAIL ADDRESS: [email_address]

NEW/CORRECTED EMAIL ADDRESS: [new_email_address]

PREFERRED LANGUAGE: [preferred_language]

UPDATED LANGUAGE PREFERENCE: [new_preferred_language]

STUDY COMPLETED ON: [gift_card_participant_signature_date]

UPCOMING CLINIC APPOINTMENT: [appointment_clinic], [appointment_date] [appointment_time]

Email Instructions in English to [email_address], or to [new_email_address] (if new email is available)

Email Instructions in Spanish to [email_address], or to [new_email_address] (if new email is available)

Add Field   Add Matrix of Fields

Variable: retention_contact_4_date_time   *Branching logic:* [retention_contact_4(yes)] = 1

Retention contact #4 date and time

| | Now | M-D-Y H:M |

Add Field   Add Matrix of Fields

Variable: retention_contact_4_crc   *Branching logic:* [retention_contact_4(yes)] = 1

Who made retention contact #4?

- ◯ Aimee Nguyen
- ◯ Antonio Salgado
- ◯ Ashley Athanas
- ◯ Emily Hur
- ◯ Eric Gonzalez
- ◯ Erin Saltmarsh
- ◯ Irena Chuchev
- ◯ Joel Flores
- ◯ Justin Choi
- ◯ Justin Lopez
- ◯ Linda Wright
- ◯ Maribel Perez
- ◯ Nicolas Gonzalez

reset

Add Field   Add Matrix of Fields

Variable: retention_contact_4_outcomes   *Branching logic:* [retention_contact_4(yes)] = 1 AND ([retention_contact_4_outcom...

Retention contact #4 outcomes

- ◯ Called, spoke with the prospective participant

○ Called, spoke with someone else
○ Called, no answer, left voicemail
○ Called, no answer, and no voicemail or voicemail full
○ Called, wrong # (if available, specify alternative phone # in "new or corrected phone number" on Form 3)
○ Retention instruction email sent
○ Email rejected (if available, specify alternative email address in "new or corrected email address" on Form 3)
○ Neither phone # nor email address is available
○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

🖉 📄 ⊤ 📑 ✖   *Variable:* retention_contact_4_request   *Branching logic:* [retention_contact_4(yes)] = 1 AND ([retention_contact_4_outcom...

Retention contact #4 request (if applicable)

○ To be contacted later by text
○ Busy, but interested and wished to be called back later
○ To have a password reset email sent and will complete the surveys later on their own
○ To update their email
○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

🖉 📄 ⊤ 📑 ✖   *Variable:* retention_contact_4_decision   *Branching logic:* [retention_contact_4(yes)] = 1

Retention contact #4 decision

○ Agreed to complete followup surveys on their own
○ Agreed to schedule an appointment to complete followup surveys
○ Declined to do
○ Other (specify in notes below)

reset

Add Field   Add Matrix of Fields

🖉 📄 ⊤ 📑 ✖   *Variable:* retention_contact_4_notes   *Branching logic:* [retention_contact_4(yes)] = 1

Retention contact #4 notes

Expand

Add Field   Add Matrix of Fields