Header

Is this a real participant or pilot/test/training session?

- ○ Real data
- ○ Fake data

Who were the research assistants today? Enter RA last name and separate RAs with a semicolon.

- ☐ JohnsonHurwitz
- ☐ Keiser
- ☐ Nagler
- ☐ Schneck
- ☐ Other ______

SubID

______

SOP Start

RISK Intake Session SOP
Location: P:\StudyData\RISK\Methods\SOPs\Session SOPs\RISK Intake Session SOP

STUDY TEAM

Principal Investigator	John Curtin	608-217-6221
Study Coordinator	Candace Johnson-Hurwitz	314-899-3276
Research Specialist/RA	Jill Nagler	608-220-2631
Research Specialist/RA	Kerry Keiser	608-333-6741
Lab Manager	Susan Schneck	608-293-2412
Assistant Director of PRTC	Chris Gioia	608-235-3659

Prior to participant arrival (please arrive 45 min early):

1. Go to Room #195 to access the RISK file cabinet which is where the participant's study folder is stored. In addition to the participant's folder you will need the following items:

is stored. In addition to the participant's folder you will need the following items:

   - Responding to Daily Audio Surveys Handout
   - Participant's RISK mHealth payment form
   - Participant Payment Form
   - Interview Form
   - Contact Logs
   - Location Logs
   - Take-Home Informational Study Brochure
   - Bus Pass (as needed)
   - Check (Stored in the RISK file cabinet in Room #187)
   - Note the date of their last reported drink
   -

2. Collect the following items from room #187
   - 2 iPads

Items below are only for participants using a study iPhone

- iPhone
- iPhone Charger
- iPhone Battery Case

Clinical Crises
Clinical Crises SOPs are stored in the RISK file cabinet. If you are leading a session you have already been trained on each of the lab's clinical crises SOPs. Consult them as needed.
Please **NEVER** hesitate to contact a member of the study team, especially clinical support (Chris Gioia), for guidance on how to address a crisis situation.

Dates to Know-Date of participant's last reported drink
You will need to reference this date during the intake session to confirm that it is still accurate. This date can be found in the participant's ID screen battery or on the study folder face sheet.

At Scheduled Session Time:
Meet participants in the Psychology Research Waiting Room, Rm. #151 OR the Psychology Research and Training Clinic, Rm#351. Greet participant, introduce yourself and take them to the assigned room.

If the participant has not yet arrived, wait for 5 min.

- After 5 min, check for a voicemail from the participant: Mailbox: 8904796 Password: 12769#

- After checking the voicemail, return to the waiting room to see if the participant has arrived.

If the participant has still not arrived, wait an additional 5 minutes.

- If after 15 minutes there's no call from the missing participant, check voicemail again. Additionally, check email if you have ever corresponded with the participant via email: Go to wiscmail.wisc.edu (Study Email: arl4_psych@wisc.edu)

  NetID: arl4_psych
  Pass: Curtin@rl

- If you still haven't heard from the participant call them to verify that they cannot make it and/or reschedule.

- Remember to update the participant's appointment outcome in the enrollment database (no-show/canceled/rescheduled). If the appointment was rescheduled, enter in the new appointment time. If the participant canceled the visit and does not intend to schedule a new appointment, be sure to "dispose" of the participant in the enrollment database.

Did the participant arrive? (if yes, note what time they arrived (e.g. 4:00 pm))

- No
- Yes ______

Sobriety Date

Sobriety Date Check-In
Before we get started I just need to do a quick check-in about the last time you had a drink of alcohol. The last time we met, you reported that you hadn't drunk any alcohol since ______. Has this date changed since I last saw you? ****Participant's sobriety date can be found on a sheet of paper stapled to the inside of the participant's study folder, looking in Qualtrics at participant's screening battery, or the session note completed at participant's screening visit.***

Enter participant's sobriety date. The sobriety date should be the day after the participant had their last drink. Show participant a calendar if needed.

	Month	Day	Year
Please Select Date	▼	▼	▼

Has the participant drunk alcohol since you last saw them?

- No (or more than 7 days since last drink of alcohol)

◯ Yes (or less than 7 days since last drink of alcohol)

If No (or more than 7 days since last drink)-Read:

Thanks for sharing with me the last date you drank alcohol.

Each time you come to a session, I will verify the date you last drank alcohol. Please know there are no consequences to your participation in our study if you do drink alcohol. Knowing when participants begin drinking again, even if it is only one drink, helps us accomplish our study goals. As you know one of the main goals of our study is to create a resource that people trying to recover from alcoholism can use. Knowing when people in our study have had a lapse will contribute to this resource because we will be able to see what circumstances may lead an individual in recovery to begin drinking again.

Do you have any questions?

If Yes-Read:

Thanks for sharing with me the last date you drank alcohol. As you know one of the main goals of our study is to create a resource that people trying to recover from alcoholism can use. Knowing when participants begin drinking again, even if it is only one drink, helps us accomplish our study goals. Knowing when people in our study have had a lapse will contribute to this resource because we will be able to see what circumstances lead an individual in recovery to begin drinking alcohol again.

Because we need to know, in real-time, what circumstances may lead to the use of alcohol, we can't enroll participants who have been without alcohol for less than one week. However, once you complete your second study visit and are fully enrolled in the study there will be absolutely no consequences to your study participation if you lapse and begin to drink alcohol again.

If you would like, we can reschedule this visit for a time when you think you will be at least one week without alcohol. We can do that today, or I can call you later in the week to reschedule. What would you like to do?

If the participant is not enrolled in AODA treatment, ask them if they would like another list of mental health and substance use resources.

Is the participant able to continue the session?

◯ No

◯ Yes

Participant must be sober for a minimum of 1 week when they enroll in the study. Participants who have not reached one week of sobriety will need to be rescheduled.

How many weeks has the participant gone without alcohol?

- Under 1 Week-Session must be rescheduled
- Between 1 and 8 Weeks-Continue with session
- Over 8 Weeks-Consult with Candace/Susan/John before continuing

Who did you consult with?

- Candace
- John
- Susan
- Other

After consultation re: participant over 8 weeks sober, it was determined that participant can...

- Continue with Session
- Discontinue Session, Participant is no longer eligible

Intake Completion

Did participant complete the intake session?

- No
- Yes

Why was the session incomplete?

Please note any additional concerns or issues with intake session.

Ineligible Participants

Debrief If No Longer Eligible:

1. If the participant is no longer eligible for the study, debrief the participant. **Do not tell participants why they are ineligible. If they ask tell them that unfortunately, we are not able to tell them that information.**

Thank you for taking the time to come to our lab today. Unfortunately, you are not eligible to continue to the next phase of this research study. We truly appreciate you taking the time to come to our lab today. As discussed earlier, you will be compensated at the rate of $20 per hour for all the time you have spent in our office today.

Do you mind completing a feedback form before you leave today? It is your chance to let us know about your experience here today.

1) If the participant decides to complete the feedback form:

Set up the participant with the iPad and open the feedback form Qualtrics survey (Feedback Form Battery-RISK). Ask the participant to tell you when they are finished with the survey.

2) Payment (regardless of whether they fill out the Feedback form):
Pay participant for the time in the lab ($20/hr.) with a check (round up to the next closest half hour) from the green checkbook and read this script:

As discussed today, you will be compensated at the rate of $20 per hour for all the time you have spent in our lab. Please complete this "participant payment form."

Did participant complete feedback form?

- No
- Yes

Please explain below why feedback from was not completed.

Payment for today's session

- Ineligible Participant-Paid Now (e.g., 20.00)

Check below when you have updated the enrollment database with the participant's status.

- Completed

Please note any additional issues or concerns below.

Check below when you have completed the session notes.

- Completed

Ineligible Participant-Less than one week sober

Participant has been sober for less than one week and is ineligible to participate at this time. Does participant want to reschedule intake session?

- No
- Yes

How and when will session be rescheduled?

- Participant will call RA to reschedule
- RA will call participant to reschedule
- Participant can reschedule now

The participant's rescheduled appointment is... Insert Date (mm/dd/yyyy) and time (e.g., 1:00 pm):

Participant Payment

- ◯ Participant Paid for Screen and Intake Hours (Will not Reschedule Intake)
- ◯ Participant Paid for Screen Only-(Intake will be Rescheduled)

Check below when participant mHealth payment form is completed?

- ◯ Completed

Additional Notes or Concerns

Please write any additional notes or concerns below.

Check when you have finished the session notes.

- ◯ Completed

Session Order

Order

- ◯ Interview
- ◯ Tech
- ◯ EMA section

Let's start by giving you a quick rundown of what we are going to do today.

Today's visit will last between 2-3 hours
The first thing you are going to do in today's visit is complete an interview where you will be asked to share information about people, places, and events that have an impact on your recovery efforts.

You will complete another series of questionnaires. These questionnaires will ask about your recovery efforts, your personal support network, your current life situation, and your emotions.

Finally, I will show you how to use each of the apps for the study and how to respond to the daily surveys so that you feel comfortable with how they work before you leave today's visit.

You will be paid today for the time your spent with us during your last visit. You will receive payment for today's visit, and the take-home assignment you completed, at your next visit to our office.

Do you have any questions before we get started?

Will participant continue with study today?

- No
- Yes

Phone Type

Is participant using their own phone?

- No
- Yes

IF APPLICABLE: Phone Release Agreement Form
Participants who are temporarily releasing their phones for study staff to hold until they complete study participation must complete a Phone Release Agreement form. Review form with participant and have them sign form.

IF APPLICABLE: Help Participant set up their iPhone. This is only needed for participants who transfer their SIM card to a study iPhone. Instructions on how to set-up the iPhone can be found here: **P:\StudyData\RISK\Methods\SOPs\Session SOPs\Mobile and Wireless SOPs**

- Help Participant set-up an email address (as needed).
- Encourage participant to remember their email and password.
- Help Participant set-up their Apple ID (as needed)
- Encourage participant to remember their ID and password. Inform them that they will need this to access their account on line and to obtain apps from the app store (even free apps).
- Encourage them to turn on the Find my iPhone app in case they misplace their phone.
- Encourage participant to set up the Touch ID feature and help them do so as needed.
- Help participant set up their voicemail
- Make sure essential program numbers have been saved as contacts into phone:

- Mobile Health Study: 608-890-4796
- Survey Number: (Depends on what number they get their surveys from, have them save the number as a contact starting on their first day of data collection and follow up with them at check in regarding what number they are getting their surveys from)
- Audio Survey: 608-572-2496

Was participant's SIM put into the study iPhone?

- No
- Yes

Was the participant shown how to use the study iPhone?

- No
- Yes

Study iPhone Notes
Please describe in detail if there were there any concerns or issues with the study iPhone. In particular, please describe any task that was not completed.

Technology Use Agreement Form

- Review form with participant and have them sign it.
- Make sure all items participant takes home are tracked on technology agreement form

Was the technology use agreement reviewed and signed by participant?

- No
- Yes

Please describe in detail if there were any concerns or issues with completing the technology use agreement. In particular, please explain if the use agreement was not completed.

Is the Participant using an iPhone or an Android?

- Android
- iPhone

<u>If the participant cannot get a good mobile connection in the building on their phone, participants can access the free University Wi-Fi:</u>

1. Ask the participant to choose ‘UWNet’ from the list of available Wi-Fi network on their phone.
2. Ask the participant to open a new tab in the web browser, and try to go to a webpage such as Google.com. It will automatically redirect to the University’s wireless sign-in page.
3. Tell the participant to click ‘Request Guest Access.’
4. Participant will be asked to provide their name, email address, reason for visiting (use ‘Guest of the University’), and check a box indicating that the participant agrees to the terms and condition. After the participant, has filled in all required fields, they should click ‘Log In.’
5. Participant will see a page reading ‘Registration Successful’ and then the page will redirect to the participant’s original destination webpage. Have the participant write down the credentials they used and the password they were given to set up the guest account, in case they get disconnected and need to reconnect to the wi-fi. These credentials only last 2 weeks so they may need to request guest access again at their next office visit.

If the participant has problem connecting to the university’s free Wi-Fi, make sure that the participant’s phone has the Wi-Fi is turned on. If the participant’s phone does not automatically find open Wi-Fi connections, suggest that the participant check the settings on their phone.

Is the participant able to continue the session?

- No
- Yes

Tech iPhone

Please record name of staff member completing the tech setup below.

iPhone users:
We're going to start by having you log into the UWNet WIFI. Next we will be putting the **FollowMee** app *on your phone. You can download the app on your phone and then hand me/my assistant your phone to set up the study account or we can download the app for you.*

connect to the WIFI network and download the app

Instructions for connecting to the WIFI network:

1. Ask the participant to choose 'UWNet' from the list of available Wi-Fi network on their phone.
2. IF needed: Ask the participant to open a new tab in the web browser, and try to go to a webpage such as Google.com. It will automatically redirect to the University's wireless sign-in page.
3. Tell the participant to click 'Request Guest Access.'
4. Participant will be asked to provide their name and email address and check a box indicating that the participant agrees to the terms and condition. Then they should select "Create Guest Account," which will direct them to another screen with their credentials. Have the participant write down the credentials they used and the password they were given to set up the guest account, in case they get disconnected and need to reconnect to the wi-fi. These credentials only last 2 weeks so they may need to request guest access again at their next office visit. They should then click 'Log In.'
5. Participant will see a page reading 'Registration Successful.'

FollowMee

FollowMee is a commercially available app that we will use to track your GPS location. You will not go into the FollowMee app to complete any tasks as you won't have access to the app itself, however, it will passively collect location data in the background. We want you to share as much information with us as you feel comfortable sharing, but we want you to be in control of what you share with us, so if you don't want us tracking you for any period of time for any reason we will show you how to disable Location services.

1. Download the FollowMee app from the app store
2. Open the app - click ok for allowances that pop up
3. Start Tracking
4. Click on Menu and go to Settings
5. Click on Login Token and enter **ARCRISKAPPLE**

6. Make sure tracking power is set to High

7. Change the participant's device name in the FollowMee settings to the participant's SubId

8. Make sure to swipe FollowMee screen away so that lock screen appears

9. Make sure to check the phone settings to ensure that FollowMee has Location set to Always, Motion & Fitness is turned on, background app refresh is turned on, and cellular data should be turned on

See Tech Set-up SOP for full instructions

Did staff review FollowMee app with participant? Make sure participant knows how to turn off location services.

- No
- Yes

FollowMee Notes
Please describe in detail if there were any issues or concerns. In particular, please describe any task that was not completed.

<u>Deleting Phone and Text Logs</u>

I want to remind you that as part of the study at your follow up visits we will be collecting your phone and text logs. You are free to delete any text messages or calls made if you do not want us to see them for any reason. However, we encourage you not to delete texts or call logs that you don't mind sharing with us as the information contained in your phone and text logs provides us with useful study information. We do not have access to pictures or attachments contained in text messages.

*If the participant is using their own device, confirm with them that they know to delete call and text logs.
*For participant's who are using our iPhone, show them how to delete call and text logs as needed.

Deleting Phone Calls <u>(iPhone)</u>:

- From the home screen, tap **Phone**
- Select Recents at the bottom of the screen
- Select **Edit** in the top right hand corner of the screen
- A minus sign will appear in a red circle next to each call entry
- Select the minus sign for any call log you would like to delete and select **Delete**
- When you complete selecting phone calls you want to delete, select done in the top right hand corner of the screen

Deleting Text Messages (iPhone):

- From the home screen, tap **Messages**.
- Tap the message thread as needed.
- Tap and hold the preferred message within the thread.
- Tap **More**.
- The preferred message should have a check mark next to it. If it doesn't, tap to check the preferred message(s).
- Tap the **trash can** icon in the bottom left hand corner of the screen.
- Tap **Delete Message**.
- You've now deleted the message.

Was participant shown how to delete phone logs?

○ No

○ Yes

Was participant shown how to delete text messages?

○ No

○ Yes

Notes-Phone Call Logs and Text Messages
Please describe in detail if there were any concerns or issues. In particular, please describe any task that was not completed.

EMA

EMA Procedure

As mentioned during your last visit, as part of your participation in this study, we will ask you to respond to text messages with questions about your recovery efforts and emotions four times a day for a three-month period.

Starting tomorrow, you will begin receiving text messages on your phone. Every day you will receive four text messages throughout the day, for three months, directing you to complete a survey. You can expect to receive one message at your earliest reported wake time, one message one hour before your reported bedtime, and two messages during the middle of the day.

Each text message will contain a link to an online survey. You should click on the link in the text message and complete the survey that pops up as soon as possible. You should answer all the questions using the touch screen on your phone.

The questions ask about different time frames. Some questions ask about the present, some ask about events that have occurred in the recent past, and other questions will ask about future events.

Registering Participants for their surveys-*See Tech Set-up SOP for full instructions*
Participants surveys should be set up before their intake appointment. They will have for surveys to register for, each designated by their Sub ID. The 4 surveys will be titled: RISK – Morning (Sub ID), RISK – Audio (Sub ID), RISK – Randomized (Sub ID), and RISK – Evening (Sub ID). In order to register the participant, click on the appropriate survey, and there will be a **Participant Signup Link.** Click on the link and you will get a page that asks for a first name, last name, email and phone number. Use the designation RISK and the participant's assigned Sub ID as their first name, last name, and email address (e.g., RISK 001), and then enter their cell phone number. Participants will have to open all four links in order to be registered. You can verify that they have registered by clicking on each of their surveys and clicking the Participants icon.
It should say **YES** under **SMS Verified** and under **Active.**
Participants may be sent registration links before the tech part of the visit, just make sure that the RA running the interview alerts the participant not to open the links until instructed to.

Survey Practice
Now we are going to practice completing a survey. In a moment, a text message will appear on your phone.
***Project staff will arrange for this text to be sent.**

Next, select the link to the Qualtrics survey and verify that the EMA Qualtrics survey formats correctly. Ask the participant to practice completing the EMA survey.

Many of the questions will ask about events that have occurred since you completed your last survey. You can count this practice survey as your last survey, so when responding to your first survey after you complete this visit, you can reference since completing this practice survey.

Steps for setting up test Morning EMA:

1. Open Survey Signal on the lab laptop.
2. Go to the participant's Morning Survey and click on the participants icon
3. Click on **Send Message**
    a. Subject is "SurveySignal>"
    b. Body is "It's time to take your survey. Here is the URL: https://goo.gl/Xst8uc
4. There are templates for each test survey set up in Survey Signal. You can open Survey Signal in two windows on the lab laptop and copy and paste the test survey links from the templates.

Go over the EMA-Morning Survey:
EMA-Morning (share the information below while participant reviews the survey on their phone).

You will receive this survey once a day. This survey will be your first survey of the day. There are 10 questions on this survey.

The first question asks you to report on your use of alcohol. The specific question asks "Have you drank any alcohol that you have not yet reported?" If you have had anything to drink that you have not reported to us, we would like you to report it here.

When reporting any alcohol that you have drank you will be asked to indicate the date of the first drink that you have not yet reported, and the hour of the first drink that you have not yet reported. The hour of the first drink simply means to give us an approximate time of when you had the drink.

You will then be asked to indicate the date of the last drink that you have not yet reported, and the hour of the last drink that you have not yet reported. If you only had one drink, the date and hour for your first and last drink will be the same. Example; if you had a drink at 11:00 p.m., and no other drinks before completing a survey you would indicate the same date and time for your first and last drink.

Again, it is very important for us to know when participants begin drinking again, even if it is only one drink. As you know one of the main goals of our study is to create a resource that people trying to recover from alcohol addiction can use. Knowing when people in our study have had a drink will contribute to this resource because we will be able to see what circumstances may lead an individual in recovery to begin drinking again.

Please note that if you have used any alcohol since completing your last survey and you forget to report this when completing a survey, you can report it at any time. You can report use of alcohol whenever you remember.

Once you report the date and hour of your last drink, you will be asked- Is your goal still to remain abstinent in the future? You can respond no/uncertain/yes to this question.

Next, you will be asked to report on your greatest urge to drink since your last survey. This question is what we call a slider question. There are a few of these on the survey. You must move the slider to record a response, even if it is already under the response you want to select (No Risks/No Urges). Move the slider, then move it back. The circle will be faint, if you did not move the slider to select a response. You will also be unable to complete the survey if you do not move the slider.

Next, you will be asked to report on any "risky situation" you experienced since your last survey. A risky situation is an event that put you at risk to drink alcohol.

The next question asks about whether a hassle or stressful event has occurred since your last survey. The following question asks you whether a pleasant or positive event has occurred since your last survey. We want you to report the intensity of any hassle or positive event that you have experienced since your last survey, even if you would consider the event to be more of a daily *hassle or a mildly pleasant experience.*

Examples of hassles or stressful events might include being late to work, missing the bus, having an argument, noticing your bank account balance is low, receiving a large bill, and you or a family member falling ill.

Examples of pleasant or positive events might include having a pleasant conversation with a friend, getting a raise or bonus at work, eating a delicious meal, or going to the movies.
If more than one negative or positive event occurred since your last text message response, then rate the most intense event. If no negative or positive event occurred, then respond 'No Events'.

The next question asks you to rate your mood.

You will then be asked to rate the likelihood that you will experience a risky or stressful event in the next week.

Finally, you will be asked to rate the likelihood that you will drink alcohol in the next week.

Verify that the participant did not have any issues completing the EMA survey and inquire if they have any questions.
Remind participants that when they get to the bottom of the Qualtrics survey, they will need to click the submit button. You have completed the survey when you get a message that says, "We thank you for your time spent taking this survey. Your response has been recorded."

Review EMA-Later Survey:

Steps for setting up test Later EMA:

1. Go to the Participant's Evening Survey and click on the participants icon
2. Click on Send Message
    a. Subject is: SurveySignal>
    b. Body is: It's time to take your survey. Here is the URL: https://goo.gl/Mb1XSQ

There are 7 questions on this survey and all the questions on this survey are also on the morning survey. You will complete this survey three times a day.

For additional practice, have participant complete this survey on their own.

Did staff complete EMA survey demo and practice with participant?

- No
- Yes

Audio Response to Daily Recovery Check-In Question

Steps for setting up test Audio EMA:

1. Next set up the participant's Audio survey and click on the participants icon

2. Click on Send Message
    a. Subject is: SurveySignal>
    b. Body is: Please send your daily audio msg to 608-572-2496 now. https://uwmadison.co1.qualtrics.com/jfe/form/SV_00X6MBp2i6CPozP
3. Show the participant how to send the audio message AND give them the instructional handout.

Now, let's talk about the daily audio message that you will complete. This message will come from the same number as the survey links: Each day you will receive a text that says: ***Please send your daily audio msg to 608-572-2496 now.*** *Your daily audio message should be in response to the prompt "How are you feeling about your recovery today?" There will be a survey link attached to the text message, however the survey link will instruct you to complete your audio text message as we will instruct you. Now, let's practice receiving and sending an audio voice note. This message will come about 5 minutes after your morning survey. Feel free to complete it then, or* ***<u>any other time before the end of the day(midnight).</u>***

Did staff complete Audio EMA demo and practice with participant?

- No
- Yes

<u>EMA Form</u>
Next, I am going to go over your wake/sleep times form that was completed at your screening session. Messages are sent at your earliest reported wake time and an hour before your earliest reported bed time. And as a reminder, surveys are counted as completed for bonus purposes if they are completed within the survey window, please do your best to complete them within an hour of notification. The audio text message is counted as complete if it is done the same day it is sent.

Go over the RISK EMA Form reporting their wake and bed time for every day during the week. Make sure that they report their sleep/wake schedule. If there are issues regarding early wake time.

Was EMA form (wake and bed times) completed?

- No
- Yes

<u>Add Essential Study Numbers</u>
Make sure essential program numbers have been saved as contacts into participant's phone:

- Mobile Health Study: 608-890-4796
- Survey Number: (Depends on what number they get their surveys from, have them save the number as a contact starting on their first day of data collection and follow up with them at check in regarding what number they are getting their surveys from)
- Audio Survey: 608-572-2496

*The study phone number-**Mobile Health Study**- (608)-890-4796 is the best way to get in contact with us.*

The phone number from which you can expect to receive text messages with links to complete the surveys save as Daily Surveys. This will be the number you get your surveys from starting tomorrow.

*The number where you will be sending your audio response to the daily recovery check-in question **Audio Survey Number**-(608)-572-2496*

*As a reminder, you **cannot** reach us by calling or texting the Daily Surveys number or the Audio Survey number. If you call that number, you won't reach anyone.*

*It is **extremely** important that if you need to get in touch with us, you call the (608)-890-4796 number listed in your Contacts as Mobile Health Study.*

Never leave request to respond to crises on the study line or via the voice note. The voice notes are not checked daily. If you need urgent mental health or medical attention, call 911 or take yourself to the emergency room immediately. Our project is not equipped to respond to crises.

Do you have any questions about this?

***Make sure vibrate is activated when phone is silent by checking settings. Instruct participant to leave this feature on so that they will always be notified when a new survey is delivered and ready to be completed.**

EMA Notes
Please describe in detail if there were there any concerns or issues with EMA demo and practice. In particular, please describe any task that was not completed.

ID Intake battery-Risk

Qualtrics Procedure: Individual Differences Questionnaires
Next, I am going to have you complete some questionnaires. Each questionnaire will have instructions. Please let me know if you have any questions as you work on completing them.

- Set-up all participants with an iPad and open the individual difference questionnaires in Qualtrics survey labeled: ID Intake Battery-RISK

Make sure participant feels comfortable completing surveys on iPad before you leave them alone.

Did participant complete the ID Intake battery?

- No
- Yes

If no, please explain below:

Interview

Please record name of staff member completing the Recovery Environment Interview below.

Interview Script-Intake Session

Now you are going to take part in the interview about your recovery environment. The purpose of this interview is to discuss people, places, and events that have an impact on your recovery efforts. In this interview, we will review the forms that you completed over the last week. During the interview, we will primarily focus on the information contained in these forms. I will review the information you recorded and then I will ask you some additional questions about each location and person.

Do you have any questions before we begin?

Can you please hand me the location and contact forms you completed?

***If participant did not complete the take-home location and contact forms, give them time now to complete the forms**.

Participant Information
Blank copies of the interview form are in the RISK filing cabinet or on the shared drive:
P:\StudyData\RISK\Methods\Measures\Interview\RISK_IntakeInterviewForm_2017_0912

Interviewer will begin by completing the participant information section of the interview form. At this time, interviewer will only enter in the following information on the interview form:

- SubID
- Mobile Number
- Interview Type

- Home Address
- Is your home a place that you used to spend time drinking? Yes/No
- In the future, do you generally expect to have alcohol in your home? Yes/No

People/Contacts
Now we are going to review the people with whom you communicate with regularly.

During this part of the interview you will think about the individuals in your life who you can count on to support you in your efforts to maintain sobriety, as well as those who are unsupportive of your goal of sobriety.

Hand the participant the laminated question card.

I will ask you the following questions about each person you have identified:

- Have you drank alcohol with this person?

  Never/Almost Never, Occasionally, Almost Always/Always

  You should select the **never/almost never** response if you never or rarely drank with the person when spending time with them. **Occasionally** means that you drank alcohol with them up to 49% of the time that you spent time with them. **Almost Always/Always** means that you drank alcohol with them 50% or more of the time that you spent with them.

  What is the drinking status of the contact? Drinker/Non-Drinker/Don't Know

  Would you expect them to drink in your presence? Yes/Uncertain/No

  Are they currently in recovery from alcohol or other substances? Yes/No/Don't Know

  Do they know of your recovery efforts, and if so are they supportive/unsupportive/mixed/neutral/?
  ****Select don't know if they do not know about the participant's recovery goals***.

Are your interactions with them typically Pleasant/Unpleasant/Mixed/Neutral?

A pleasant person is a person that you enjoy spending time with. It is a person that you look forward to communicating with.

An unpleasant person is a person whom you don't enjoy spending time. You don't look forward to communicating with this person.

A neutral person is a person that you have no emotional connection to. In other words, you wouldn't define them as a pleasant or unpleasant.

You may find that an individual fits into more than one category. For example, maybe you have a friend that is generally supportive of your recovery, however sometimes they say or do things that are not supportive. In this instance, you can identify the individual as sometimes supportive and sometimes unsupportive, or mixed. Ultimately, we seek to understand how you view the individuals in your life, so if it is not possible to assign them to one category because their support varies, you can put them into the mixed category.

Next, the interviewer will collect all the contact forms from the participant. Make sure to indicate kin relationship if a family member is checked. The kin categories are as follows: Parent ,Sibling, Child,Aunt/Uncle, Cousin, Grandparent, or Family-Other

The interviewer will then record the answers to the follow-up questions on the contact log by circling the abbreviated response next to the numbered question being *asked.*
After you have reviewed all the contacts recorded on the forms, ask the participant:
Are there any other people who you communicate with on a weekly or monthly basis (phone call or text message only) that you have not recorded on these forms? ***Record additional people as needed.***
You will also have the opportunity to tell us about any additional contacts at your next office visit, if you find that there are people with whom you speak with/text with often that you have not yet reported.

Locations

Now we are going to review the places you go regularly. For each place, you have recorded, I will ask you to categorize the place as either pleasant/unpleasant/mixed or neutral. Additionally, I will ask you to identify the place as high risk, medium risk, low risk, or no risk. Before we begin, I am going to take a minute to explain the categories to you.

A pleasant place is a location that you enjoy spending time. It is a place that you look forward to visiting. You can consider this a fun place, or a place that makes you feel happy, joyful, peaceful, or carefree.

An unpleasant place is a place where you don't enjoy spending time. You don't look forward to going to this place. This may be a place that leads to you feeling sad, stressed, anxious, or angry.

A neutral place is a place that you have no emotional connection to. In other words, you wouldn't define it as a pleasant or unpleasant place to spend time.

When trying to categorize a place as pleasant or unpleasant you may find that a place may fit into more than one category. In that case, you can identify the place as mixed.

Do you have any questions about the categories pleasant/unpleasant/mixed/neutral?

After you have identified a location as pleasant/unpleasant/mixed/or neutral, I will ask you to identify the likelihood that you will drink, or have a desire to drink, when visiting each location. You will categorize the place as high risk if you anticipate having a strong urge or desire to drink before, during or after visiting the location. You will identify a place as medium risk if you have a moderate urge or desire to drink before, during, or after visiting the location. You will identify the place as low-risk if you have a minor urge or desire to drink before, during or after visiting the location. If you anticipate no urge or desire to drink when thinking of a location, you will identify the place as no risk.

Now that you have explained the response categories, you can complete the remaining follow-up questions about the participant's home under the Participant Information section of the interview form.

- Participant's experience here is typically…Pleasant/Unpleasant/Mixed/Neutral
- Participant's RISK in this location: High, Medium, Low, No Risk Neutral

Now, review each location participant documented on the location logs by stating aloud the information they have recorded on each form. Once you have confirmed the information recorded on the form, ask the participant to categorize the place as pleasant/unpleasant/mixed/neutral. Additionally, ask the participant to identify each location as high, medium, low, or no risk.

After you have reviewed all the locations the participant recorded, ask the participant:
*Are there any other locations that you go to on a weekly or monthly basis that you have **not** recorded on these forms?* **Record additional locations as needed.**

You will also have the opportunity to tell us about any additional locations at your next office visit, if you find that there are locations you frequent that you have not yet reported.

<u>Risky Locations</u>
Ask participant to share addresses of places they are trying to avoid as they seek to maintain sobriety. Record this information on the interview form. Additionally, record:

- **Type of place**
- **If participant has drank alcohol here**
- **If alcohol is available here**
- **If the place is pleasant/unpleasant/mixed/neutral**

<u>Emotionally Important Days-Recurrent</u>
Ask the participant to identify "emotionally important" days that put them at-risk to begin drinking again. The days participant identifies are recurrent days. Have participant identify days that will occur during their participation in the study (Next 90 Days).
Next, I would like you to think about the next three months. Are there any upcoming days that you would identify as "emotionally important," meaning they put you at-risk to begin drinking again? I can pull up a calendar on the iPad OR feel free to look at your calendar on your phone. We are only looking at the 90 days that you will be on-study. **Give examples here.**

Example Days:

- **Holidays**
- **Birthdays**
- **Anniversaries (In particular, anniversaries that mark traumatic events-death of a loved one, major car accident, etc.…)**
- **Sobriety Anniversary (from substance other than alcohol)**

Let's look at each month one by one. Are there any upcoming emotionally important days for month 1...month 2… month 3?

Time-Periods
Ask the participant to think about their typical week. Have the participant list each time-period during the day that puts them at increased risk to drink. These times are "risky" time-periods. In turn, are there any specific time-periods during the participant's week that they can identify as protective, meaning they are confident that they would not drink during this time. Be sure to specify the time-period and day of the week for each time-period identified by participant.

Next, I would like you to think about your typical week to look at days and times that may be identified as risky, meaning you are at an increased risk to begin drinking alcohol again, and days and times that you identify as protective, meaning you are confident that you would not drink during this time

Review average day with participant, then ask them to identify any risky or protective time-periods. Record each time-period identified on the interview form.

Now that we have gone over your typical week, are there any time-periods during the day, or during particular days, of the week, that you would identify as risky, meaning you are at an increased risk to begin drinking alcohol again. In turn, are there any specific time-periods during the week that you can identify as protective, meaning you are confident that you would not drink during this time?

Give examples here. Examples:

- **Work Hours**
- **After Work Hours**
- **School Hours**
- **Weekends**
- **Volunteer Activities**
- **Fitness Activities**
- **Church/Other Weekly Religious or Spiritual Event**

Planned Vacations
Ask the participant if they have any vacations planned while they will be participating in the study. Record each vacation period. Indicate the start and end date for each vacation period. Also, indicate if the vacation is in town or out of town. If the location is out of town, indicate the city and state/country if they are traveling outside of the United States.

Next, I would like to ask you about any upcoming vacations you may have planned in the next three *months. If you have any vacations planned let us know the start and end dates of the vacations and whether the vacation is in town or out of town. We're especially interested in knowing about any traveling you might do that may interfere with your ability to use any of the study devices or complete any study related tasks.*

Did participant complete recovery environment interview?

- No
- Yes

If no, please explain below:

Scheduling Follow-Up #1

Schedule Follow-up Interviews

Now, let's schedule your follow-up interviews.

Schedule the interviews 30, 60, and 90 days from the intake date (+ or – a few days).

Allot 2-2.5 hours for follow-up #1 and #2. Allot 2 hours for follow-up #3.

Let participant know that we will also mail/email them an appointment reminder letter outlining all of the scheduled follow-up sessions. Also, let participant know that you will call them a day prior to their scheduled appointment.

Schedule Check-in Time with Participant
Let participant know that you will be contacting them during their first week of data collection to make sure that they feel comfortable using the study technology.

- To occur the first day of data collection (If Intake occurs on a Friday, schedule check-in for Monday)

Schedule the first check-in with the participant before they leave today.

Let participant know that they can contact you at any time outside of the scheduled calls during business hours (9-5) if they are having any issues using the technology.

Did you schedule followup appointment #1 with participant?

- No
- Yes

Why was follow-up #1 not scheduled?

Insert date of follow-up#1 appointment below (mm/dd/yyyy).

Insert time of scheduled follow-up #1 appointment

Feedback Form

Feedback Form

We are very interested in getting your feedback about your experience participating in this study. The last questionnaire that you will complete today is a feedback form. This questionnaire will help us learn the things that are working well in our study and the things that we need to look in to further *to improve.*

Set-up participant with an iPad and open the individual difference questionnaires in Qualtrics survey labeled: Feedback Battery-RISK

Did the participant complete a feedback form?

- No
- Yes

Please explain why participant did not complete a feedback form.

Payment and Departure

Payment for Today's Session

As discussed in previous sessions, you will be compensated at the rate of $20 per hour for all the time you spend in our office. Today you will be paid for the time you spent in our office during your last visit (screen visit). You will receive payment for today's visit, and for completing the take-home assignment, at your next appointment.

1. Complete mHealth payment form for today's visit.

   Always round up to the next closest half hour

2. Review the participant's mHealth payment form for their intake session.
3. Pay participant for the time they spent in the lab during their screening appointment ($20/hr) with a check from the green checkbook. Write down the check # date paid, and total earned and paid on the participant's payment form.
4. Present check to the participant.

Have the participant complete and sign the participant payment form.

Check below when participant has been paid. Participant is to be paid for completion of the screening session.

- [ ] Completed

What time did the participant depart from the lab? (e.g. 4:00 p.m.)

____

Check below when mHealth payment form has been completed.

- [ ] Completed

Documenting Scheduled Follow-up#1 Appointment

Documenting Scheduled Follow-Up Interview #1:

On the RISK calendar enter in the follow-up #1 appointment time you scheduled with the participant.

How to create events on RISK Google calendar: Click the time on the calendar.
Title: Follow-up #1 followed by their SubID. Always include name of RA running the session. Allot 2.5 hours for the appointment. Enter in any important notes (ex: the participant may be 10 minutes late), and reminder notifications.

Check when you have updated the Enrollment database with participant's follow-up #1 appointment.

- [ ] Completed

Check when you have updated the RISK Google Calendar with participant's follow-up #1 date.

- [ ] Completed

Have you have emailed the individuals on the RISK list serve of the scheduled follow-up #1 appointment?

- No - Please Remember to send this email ASAP
- Yes
- Not Applicable

Confirmation Letter

Email/Mail the participant a confirmation letter. A sample letter can be found at: P:\StudyData\RISK\Administration\Participants\SchedulingDocuments\Mail and Email Correspondence*Appointment Reminder Letters\Letters (or Emails)*-**Select appropriate letter**

Study Email: arl4@psych.wisc.edu, Use the NetID: arl4_psych

1. Password: Curtin@rl
2. Email text from the selected file with details specific to the participant.
3. Attach this file as needed: Parking and Bus Map-Word
   P:\StudyData\RISK\Administration\Participants\SchedulingDocuments\Mail and Email Correspondence*Parking and Bus map2017_0120*

Reserve Parking
If participant needs a parking spot:

1. Go to http://psych.wisc.edu/RoomsAndEquipment/ and log in:
   Email: arc_psych@wisc.edu, Password: CurtinLab
2. Click Bookings in left hand menu
3. Change “View Schedule” to “Parking Schedule”
4. Click at the start time of an available slot. Change the end time to reserve for the correct amount of time
5. Under Summary type “RISK”
6. Go to the main office in room 238. Gary or Susan can help you with this process: take a green parking pass and stamp the session date twice.
7. Mail the participant his or her parking pass along with a reminder letter for the date and time of their screening visit and a map showing how to find the Psychology building and the spaces that are available to them.

Have you have booked parking/sent confirmation letter/email?

- No - Please Remember to Book parking/Send participant Confirmation letter/email
- Yes

RA Wrap up

Once the Participant is Finished (Important):

1. Be sure to log off all computers logged into and clear the search history on the study iPads.

2. Clean up any trash that may have been left by participants.

3. Enter in any scheduled visit dates into the RISK Google calendar, and Titanium if the visit will be held in the clinic.

4. **Update the participant's information in the Enrollment Database. Mark the intake visit as completed and enter in the scheduled follow-up#1 visit**:

5. On the P drive create a folder for the participant in the RISK RawData folder, labeled with their Sub ID. In the participants raw data folder create an Audio folder.

6. Use the VisitDates template located in **P:/StudyData/RISK/Administration/Templates** and create a document of the subject's Visit Dates (or projected Follow Up visit dates if they haven't scheduled all 3 follow-up visits). Save this file in the participant's raw data folder.

7. Enter completed EMA form into Qualtrics-Sleep Schedule Battery. Remember to use military time. After the information is entered, store form in the participant's study folder. If the participant changed their sleep-wake times from screen make sure that the times in Survey Signal are accurate.

8. Add Interview to the Interview Data Entry Tracking spreadsheet located here: **P:/StudyData/RISK/Administration/Participants/Compliance/Interview Data Entry Tracking.** Interview Entry will be completed by an undergraduate research assistant. The hard copy of the interview form will be stored in the RISK filing cabinet in the participant's study file. SEE STUDY PROTOCOL FOR ENTERING INTERVIEW DATA HERE: **P:/StudyData/RISK/Methods/SOPs/RA SOPs/RISK_SOP_Interview Data Entry_2018_0524**

9. Enter information from participant payment form into the RISK payment spreadsheet, found here: **P:/StudyData/RISK/Administration/Participants/Participant Payment/RISK Participant Payment Tracker**

10. Update participant's mHealth payment form and file it alphabetically in the mHealth payment folder in the main filing cabinet-Room #195 (second drawer)

11. File the participant's folder in numeric order in the RISK filing cabinet in Room #195A (second drawer).

12. File the completed participant payment form in the folder labeled 'Completed RISK participant payment forms' located in main lab filing cabinet in Room #195A (second drawer).

13. Return iPads to the charging station in Room #187.

Check below when session notes are complete.

○ Completed

Tech Android

Please record name of staff member completing the tech setup below.

Android users:

Next we will be putting a few apps on your phone. The first app is called FollowMee. The second app is SMS Backup and Restore by SyncTech. FollowMee and the SMS Backup app should be available through the Google Play Store. We're going to start by downloading these apps on your phone and then we will set up the study accounts.

download the apps

FollowMee

FollowMee is a commercially available app that we will use to track your GPS location. You will not go into the FollowMee app to complete any tasks as you won't have access to the app itself, however, it will passively collect location data in the background. We want you to share as much information with us as you feel comfortable sharing, however, we want you to be in control of what you share with us, so if you don't want us tracking you for any period of time for any reason we will show you how to disable Location services.

1. Download the app from the Google Play store
2. Open the app and allow the app access (location, phone calls, contacts)
3. Go to the **Settings** tab and change the **Track Interval** setting to **1 minute**, change the **Forced Update Interval** to **2 hours**, change the **Device Name** to the participant's sub id, then enter the **Login Token**: ARCRISKANDRO
4. Go back to the Main screen and click on the **Menu** tab - select **Ignore Battery Optimization**
5. Close out of the app and make sure that the participant is locked out of the app
6. Go to the phone settings and check that app has all the necessary permissions checked, then check that the Battery settings for FollowMee are not optimized, and check to make sure that Location accuracy is set to High.

Did staff review FollowMee app with participant? Make sure participant knows how to turn off location services.

- No
- Yes

FollowMee Notes
Please describe in detail if there were any issues or concerns. In particular, please describe any task that was not completed.

App Installation for Participant's Using their Own Android Device
This is necessary to obtain phone and text logs from non-iPhone users

1. Search the app store for "SMS Backup & Restore" by SyncTech.
2. Follow installation instructions.
3. After installation, you will be prompted to select a backup location. Choose "Local backup" and leave "default app folder" selected as the location choice

Deleting Phone and Text Logs

I want to remind you that as part of the study at your follow up visits we will be collecting your phone and text logs. You are free to delete any text messages or calls made if you do not want us to see them for any reason. However, we encourage you not to delete texts or call logs that you don't mind sharing with us as the information contained in your phone and text logs provides us with useful study information. We do not have access to pictures or attachments contained in text messages.

*If the participant is using their own device, confirm with them that they know to delete call and text logs.

Was participant shown how to delete phone logs?

- ○ No
- ○ Yes

Was participant shown how to delete text messages?

- ○ No
- ○ Yes

Notes-Phone Call Logs and Text Messages

Please describe in detail if there were any concerns or issues. In particular, please describe any task that was not completed.

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