INSTRUCTIONS FOR THE CALL TRACKING LOG (CTL) FORM

I.   General Instructions

This form has been developed for use by sites who need a mechanism to track telephone contacts to the participants. The intention was for tracking telephone contacts when more than 1 ACHIEVE staff is contacting the participants, particularly during the period of remote data collection. Each time any staff attempts to OR contacts participants, a record should be added to the form that describes the contact attempt or actual contact. Completion of this form is NOT mandatory for those sites who have other processes for tracking telephone contacts, e.g. Ripple.

Please note that CDART allows multiple users to open and edit a form at the same time. If one user saves their changes, CDART will record their changes. However, if there are two users editing at the same time, when the second user saves their changes to the form, they will overwrite any changes made and saved by the first user. Moreover, if a user opens the form but does not enter any data, CDART will still periodically save the empty form. This can cause data entered by other users to be overwritten by blanks.

To minimize problems with CDART saving when multiple users are trying to access the form at one time, please open form in read-only mode, except when editing. This can be done by selecting the "View Form" option which is represented by the magnifying glass icon. In this view, one can see any data or notes entered in the form but no changes can be made. Once the user has figured out which record to add to the form, open the form using the pencil icon and make the edits, minimizing the time spent with the form open. Select "Save and Close" when finished to make the form available for other users to edit.

This form allows multiple occurrences. If additional space is needed beyond the 120 records available in the form, create a new occurrence to track additional call attempts. Multiple occurrences may be added using the + icon on the form grid.

II.   Detailed Instructions for each Item

1.   Enter the Staff ID for the person making the call attempt. This ID is a 3-digit number.

1a.   Select the study visit for which the participant is being contacted.

1b.   Enter the date on which the call attempt was made.

1c.   Enter the time at which the call attempt was made.

1d.   Select the day of the week on which the call attempt.

1e.   Select the option that best describes the outcome for the call attempt.

1f.   Enter anything that would be helpful for the recruiter/caller to know prior to calling the participant.

Items 2-120. Repeat as performed for Item 1.