Ohio's State Opioid and Stimulant Response (SOS) Grant

SAMHSA CSAT Sample Scripts for Telephone Locating

<u>Directions</u>: Feel free to use the following scripts as guides for contacting participants by telephone or in person at their places of residence. Customize them to suit the needs of your agency with the following two basic rules from SAMHSA:

1. Never mention drugs, substance use treatment, mental health treatment, or mental health until you have validated the participant's identity.
2. Never leave messages that may identify you or your agency as part of a mental health or substance use treatment program.

Scripts for Locating Participants by Telephone

- Script #1: Reaching the Participant
- Script #2: Reaching a Family Member, Roommate, or Other Contact
- Script #3: Leaving a Voice Mail

Scripts for Locating Participants by Telephone

Script #1: Reaching the Participant

- **Interviewer**: "Hello, my name is _____ and I am calling from [name of project]." [Make certain the project name does not reference drugs or substance use treatment, or mental health or mental health treatment.]
- **Interviewer**: "May I speak with [participant's name]?"
- **Participant**: "This is [name]."
- **Interviewer**: "You may remember that you took part in a health study with us about [time] ago. It's time for the follow-up interview that we discussed, and we would like to schedule the interview at a time that's convenient for you."

    [At this point, the participant may volunteer information about the previous interview, such as the location or interviewer's name, or may mention receiving correspondence from the project.]

- **Interviewer**: "In order to protect confidentiality, I need to confirm that I'm speaking to the right [name]. Can you please tell me your date of birth?"
- [Participant responds].
- **Interviewer**: "Thank you, and can you also tell me the location of our intake [or last] interview?"
- [Participant responds].
- **Interviewer**: "Thank you." [Proceed to provide details about the follow-up and schedule the interview.]

    [If participants are unable to provide adequate validation of their identity, stop the conversation at this point. Explain that you can only discuss the study with an identified participant. You can provide a phone number for the participant to call for more information.]

Script #2: Reaching a Family Member, Roommate, or Other Contact

Important: Many participants are hesitant to respond to unsolicited phone calls and may use household members as gatekeepers over the phone. If the participant is available, refer to script #1. Record on the Client Contact Attempt Log any relevant information that arises during a telephone conversation, such as work hours, the name of someone who might know the participant's location, the amount of time since the participant moved away, and other details.

Scenario A – Client still lives at location called

- **Interviewer**: "Hello, my name is _____ and I am calling from [name of project]. [Make certain the project name does not reference drugs or substance use treatment, or mental health or mental health treatment.]
- **Interviewer**: "May I speak with [participant's name]?"
- **Answer**: "What's this about?"
- **Interviewer**: "[Name] has been participating in a health study and we are trying to contact him for a follow-up interview. Is he available?"
- **Answer**: "No, he's not here."
- **Interviewer**: "Can you tell me when is the best time for me to call back and talk to him?"
- **Answer**: "I don't know when he'll be around."
- **Interviewer**: "Can I leave a message for him? He agreed to participate in our health study and it's important that we reach him. We will compensate him for his time." [Leave a message that only mentions the health study follow-up interview, the compensation that will be paid, and the number for the participant to call for more information.]
- **Interviewer**: "Thank you for your time."

Scenario B – Client no longer lives at location called

- **Interviewer**: "Hello, my name is _____ and I am calling from [name of project]. [Make certain the project name does not reference drugs or substance use treatment, or mental health or mental health treatment.]

- **Interviewer**: "May I speak with [participant's name]?"

- **Answer**: "He doesn't live here anymore." Interviewer: "Can you tell me how I might reach him? He gave us this number so we could get in touch with him."

- **Answer**: "I can't tell you anything more than that."

- **Interviewer**: "Could you please take a message for him? He agreed to continue to participate in our study and it's important that we reach him. We will compensate him for his time." [If the respondent still has contact with the participant, leave a message using the guidelines recommended above. If there is no longer any contact, refer to other phone numbers and sources on the Locator Form.]

Script # 3: Leaving a Voice Message

Often, the participant's locator phone number will be valid, but the participant is not home when called.

- **Interviewer**: "Hello, this message is for [name]. This is _____ and I'm calling from [name of project]. You participated in our health study about [time ago]. We would like to schedule the follow-up interview with you and we will pay you for your time. To schedule an interview, or to receive more information, please call us at [number]. That is a toll-free number and you can reach us between [hours]. Thank you, and we look forward to hearing from you."