

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

## **SAMHSA CSAT Sample Scripts for Telephone Locating**

Directions: 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

Source: SAMHSA. [Staying in Touch: A Fieldwork Manual of Tracking Procedures](https://ohiososevaluation.org/sites/grc_opioid_response/files/SAMHSA_Staying%20in%20Touch%20Manual_Third%20Edition.pdf) (Third Edition). Ref-604. Rockville, MD: SAMHSA, 2016, p. 144-48. Available at: [https://ohiososevaluation.org/sites/grc\\_opioid\\_response/files/SAMHSA\\_Staying%20in%20Touch%20Manual\\_Third%20Edition.pdf](https://ohiososevaluation.org/sites/grc_opioid_response/files/SAMHSA_Staying%20in%20Touch%20Manual_Third%20Edition.pdf)

# Scripts for Locating Participants by Telephone

## Script #1: Reaching the Participant

- **Data Collector:** “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.]
- **Data Collector:** “May I speak with [participant’s name]?”
- **Participant:** “This is [name].”
- **Data Collector:** “You may remember that you took part in a health study with us about [time] ago. It’s time for the follow-up assessment that we discussed, and we would like to schedule the assessment at a time that’s convenient for you.”

[At this point, the participant may volunteer information about the previous assessment, such as the location or data collector’s name, or may mention receiving correspondence from the project.]

- **Data Collector:** “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].
- **Data Collector:** “Thank you, and can you also tell me the location of our intake [or last] assessment?”
- [Participant responds].
- **Data Collector:** “Thank you.” [Proceed to provide details about the follow-up and schedule the assessment.]

[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

- **Data Collector:** "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.]
- **Data Collector:** "May I speak with [participant's name]?"
- **Answer:** "What's this about?"
- **Data Collector:** "[Name] has been participating in a health study and we are trying to contact him for a follow-up assessment. Is he available?"
- **Answer:** "No, he's not here."
- **Data Collector:** "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."
- **Data Collector:** "Can I leave a message for him? He agreed to participate in our health study and it's important that we reach him." [Leave a message that only mentions the health study follow-up assessment and the number for the participant to call for more information.]
- **Data Collector:** "Thank you for your time."

## Scenario B – Client no longer lives at location called

- **Data Collector:** “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.]
- **Data Collector:** “May I speak with [participant’s name]?”
- **Answer:** “He doesn’t live here anymore.”
- **Data Collector:** “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.”
- **Data Collector:** “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.” [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.

- **Data Collector:** “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 assessment with you. To schedule an assessment, 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.”