

- FORM:** 24 - RETENTION WORKSHEET
- Version:** 8 – October 1, 2005
- Description:** Completed by Field Center (FC) staff; 1-page form; key-entered at FC.
- When used:** Recommended for use when the FC has made a contact to conduct special retention activities with a participant who has a retention problem.
- Purpose:** To indicate that a FC contact has been made to encourage participants with retention problems to remain active in all follow-up aspects of WHI. To indicate the reason(s) for the problem, the result of the contact, and to identify which participants need further retention assistance. This form is a tool to help track and monitor FC efforts to address retention problems and is not required.

GENERAL INSTRUCTIONS

1. Use this form as needed when a contact has been made to negotiate continued participation of WHI Extension Study participants. See *Section 9.3.3 – Documenting and Tracking Special Activities for Follow-up Retention Challenge* for details of procedures. When the participant wants to reduce her participation in the WHI Extension Study, FC staff complete the “Follow-Up Contacts” section of this form to indicate that a retention contact has been made. You may record up to four contacts.
2. When the participant wants to reduce her participation in the WHI Extension Study, FC staff complete the “Follow-Up Contacts” section of this form to indicate that a retention contact has been made. You may record up to four contacts.
3. General retention activities (e.g., newsletters) are not included on this form. This form is for special retention activities that occur between a participant with a retention problem and the FC primary contact for that activity.
4. Complete the contact date, staff ID (ID of staff making the contact), contact type, reasons for retention problem, participation level, and re-contact information.
5. Record contact notes beneath key-entered boxes, as appropriate. It is recommended these notes be key-entered.
6. Review the form for completeness and forward to data entry.
7. Data Entry: Key-enter items in WHIX. Data entry staff may choose to initial or date the form after key-entry.
8. File the key-entered form in the participant's file.
9. Date for future contacts will appear on *WHIX1238 – The Member Adherence and Retention Activity Tracking Report* to help FCs keep track of the need for and timing of additional participant contacts.

Item Instructions

Contact Date	Date on which FC contacts the participant to discuss a problem with her level of retention.
Staff ID	Standard 5-digit WHI employee ID of staff person making the participant contacts(s).
Contact Type	Indicate if the contact is made by phone, mail, or by some other method.
Reason for Problem	<p>This item will assist the FC staff to identify and communicate the problem(s) addressed during the contact. Mark all that apply.</p> <p>Indicate the reasons (if known) that the participant has for reducing her participation. Mark all that apply. Write or key enter information that will help staff choose appropriate retention strategies, as appropriate, under Contact.</p> <p>Personal/Family Problems: Includes (not limited to) the following:</p> <ul style="list-style-type: none"> • Demands of work • Family or personal illness, emergency, or other family demands • Vision or hearing problems • Conflicting priorities other than work or family • Financial problems, including unemployment • Lack of cooperation/support from family/friends • Living in nursing homes/sheltered care setting <p>Travel/Scheduling Problems: Includes (not limited to) the following:</p> <ul style="list-style-type: none"> • Unable to schedule follow-up (e.g., phone interviews, mammograms) when convenient for participant • Transportation problems, traffic or parking concerns at mammogram facilities
Participation Level	<p>Record the result of the contact as initiated by the participant’s stated participation level. Mark “2-Full” if the participant agrees to participate in the appropriate full follow-up activities.</p> <p>Mark “1-Low” if the participant agrees to continue with some, but not all, of the appropriate follow-up activities.</p> <p>Mark “0-None” if the participant wants to stop all follow-up activities.</p>
Continue Contacts?	<p>Mark “0 – No” if FC staff do not plan any further retention contact with the participant.</p> <p>Mark “1 – Yes” if additional retention contacts are needed.</p>
Recontact Date	Date participant is to be recontacted.
Contact Note	<p>Record contact notes beneath key entered boxes as appropriate. These notes may be key entered (recommended).</p> <p>Use this area to describe the nature of the problem, the type of strategies used, the result of the contact, or plans for future contacts.</p> <p>For suggested retention strategies, refer to <i>Section 9.4 – Locating “Hard to Find” Participants</i>.</p>