

# MTN Annual Meeting : MTN 001

Retention Lessons Learnt  
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South African Medical Research Council

BUILDING A HEALTHY NATION THROUGH RESEARCH





# RETENTION

## Definition :

Completion of follow-up visits and procedures as specified by the protocol.

## During the study:

participants who complete all or some part of their scheduled visits in the allowable window considered retained.

## At the end of the study:

retention will be based on completion of the Week 21 visit at any time through the study end date.



## Site Specific Retention Strategies

- Retention of **100%** was targeted throughout the study.
- Participants were well educated on trial objectives and study procedures and were aware of the **commitment** required for study participation.
- Importance of obtaining very good **locator** information was emphasized
- Immediate **identification** and **response** to missed visits
- Timely **reminders** for follow-up visits
- Visits were scheduled for the **target date** whenever possible or within the target visit window.





## Follow-up Visit Scheduling and Reminder Methods

### 🚫 Participant Tracking Database

- 🚫 Entered screening date- date window closes for enrollment is calculated
- 🚫 Enter enrollment date - target dates and target visit windows for all follow-up visits are generated
- 🚫 Follow-up visit dates confirmed at prior visit, entered in chart notes and in reception diary
- 🚫 Highlighted in **green** for complete visits, **blue** for missed visits and **red** for participants out of the target and allowable window

### ✓ SCHARP Scheduling Tool

- 🚫 Useful in scheduling follow-up dates and tracking windows



## Follow-up Visit Scheduling and Reminder Methods

- **Appointment Cards**

- 🦏 Date of next scheduled visit entered.
- 🦏 Two month calendar- highlighted dates when times of doses to be recorded

- 🦏 **Phone calls**

- 🦏 Start calling participants 4 days before visit
- 🦏 reminder of visit dates
- 🦏 reminder to record last three doses before Mid and End of Study  
Period visits

# Missed Visits

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end of clinic day

list of participants who have missed visit

Same day

Phone contact –  
reschedule or  
arrange to pick up

Next day

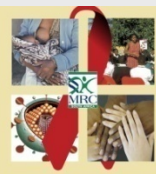
Field staff

Reschedule

Phone contact

Home visit

If participant is not reachable - move on to the next contact on the locator and so forth until a successful contact is made





## Conclusion

- 🚫 Successful retention of study participants is based on several factors
  - 🚫 Community support and trust of study participants
  - 🚫 Retention plan
  - 🚫 Staff commitment and respect for participants



## PARTICIPANT TRACKING DATABASE

Screen	Window Close	Enrol	Week 3 Open	Week 3 Target	Week 3 Close	Week 6 Open	Week 6 Target	Week 6 Close
02-Feb-09	03-Mar-09	13-Feb-09	03-Mar-09	06-Mar-09	09-Mar-09	24-Mar-09	27-Mar-09	30-Mar-09
20-Feb-09	21-Mar-09	23-Feb-09	13-Mar-09	16-Mar-09	19-Mar-09	03-Apr-09	06-Apr-09	09-Apr-09
21-Feb-09	22-Mar-09	23-Feb-09	13-Mar-09	16-Mar-09	19-Mar-09	03-Apr-09	06-Apr-09	09-Apr-09
25-Feb-09	26-Mar-09	02-Mar-09	20-Mar-09	23-Mar-09	26-Mar-09	10-Apr-09	13-Apr-09	16-Apr-09
27-Feb-09	28-Mar-09	14-Mar-09	01-Apr-09	04-Apr-09	07-Apr-09	22-Apr-09	25-Apr-09	28-Apr-09



# Appointment Cards

<b>Contact Details of MRC Staff</b>			Name :		
Tel @ MRC Clinic : 031-7771585			Surname :		
Toll free: 0800 205019					
<b>DETAILS FOR LAST 3 DOSING</b>			<b>VISIT SCHEDULE</b>		
No.	Dates	Time	Date	Visit	Time
-		:			
-		:			
3	3 days before target	:			
2	2 days before target	:			
1	Day before Target	:			



## Strategies to Encourage Women to Return for Follow up

- ⚡ **Clinic flow** was well thought out and planned
- ⚡ **Well trained staff** - smooth flow - visits completed in the minimum time. Staff were cognisant of
  - ⚡ Participants' needs
  - ⚡ Participants' problems and issues with study participation and tried to find solutions or answers to improve this.
- ⚡ **High standard of care** and treatment encouraged participants to return for their visits.
- ⚡ Many participants relied on the **support** of the nurses and counsellors for advice and medical and psychosocial referrals. Established a very good rapport with staff such that they now want to come back for VOICE.
- ⚡ **Reward system** (approved by ethics): Gifts at study exit .Slide 13





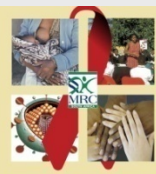
## Strategies to Facilitate Follow Up

- 🧣 **Weekend/after hour clinics:** for participants who have found employment since enrolment into the study. One participant was accommodated during afternoon clinics starting at 4pm. Transport provided- completed every visit on time.
- 🧣 **Appointment cards:** remind participants of visit dates
- 🧣 **Toll free phone line:** encourages participants to phone to reschedule or report problems at no cost to them



## Locator Information






- ⚡ Detailed locator information collected at screening visit and actively updated at all follow-up visits
- ⚡ **Definition of Adequate Locator:**
  - ⚡ Physical address for the participant with detailed directions for locating the residence (map may be drawn)
  - ⚡ Telephone number of the participant (land line or cellular)
  - ⚡ Physical address and contact number of **2** contacts who do not live with the participant
  - ⚡ If telephone numbers are not available for these 2 contacts, participant must provide physical address of third contact person.





## Locator Information

### In Addition:

-  **Contact details** for as many people as possible were collected: partner/neighbour/relative/friend.
  -  Workplace details
  -  Children's details and details of the **schools** that children attend
  -  Place of **worship**/Local **shopping** venues/**health care** facilities
-  Also asked participants how they will identify themselves when locator sources are contacted)



## Community Feedback

- ⚡ The HPRU provides community feedback on the status/progress made in the various studies to the community
  - ⚡ Bi-annual basis by the PI
  - ⚡ Three to six monthly basis by the project leaders based at the sites.
  - ⚡ Monthly basis by field staff (educators and CLOs may provide feedback to smaller groups of people).
  
- ⚡ Any rumours or misconceptions within the community are addressed as soon as possible.
  
- ⚡ Active presence in the community with continuous education and feedback sessions – our good relationship has ensured that participants have trust and faith in the MRC HPRU as well as the study staff that they deal with. [Slide 4](#)