

Evaluation of Recruitment Methods at the UC San Diego Shiley-Marcos ADRC

Christina Gigliotti, Ph.D.
Community Health Program Supervisor

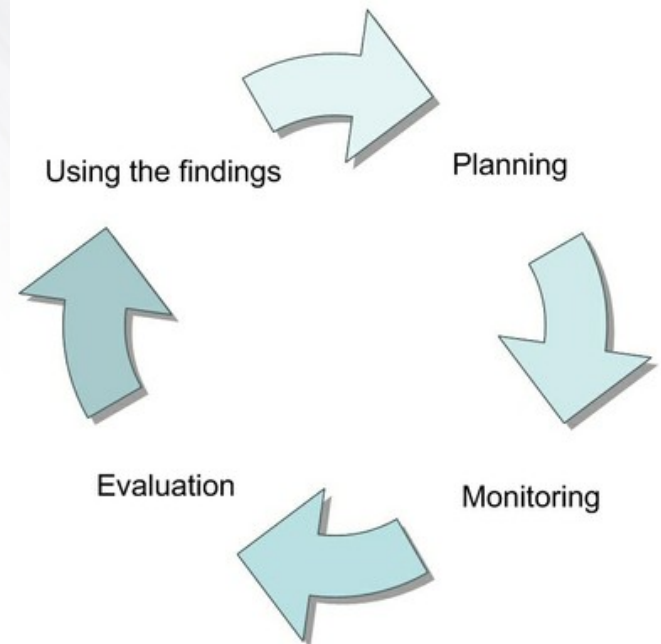
UC San Diego

SCHOOL OF MEDICINE

SHILEY-MARCOS ALZHEIMER'S DISEASE RESEARCH CENTER

The Task

- Evaluation is the ***systematic*** process of determining the value or worth of a program, course, or other initiative, toward the ultimate goal of making decisions about adopting, rejecting, or revising the innovation.



The Justification

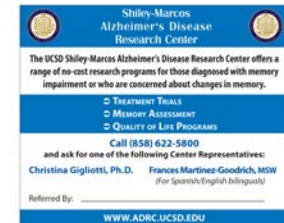
- Better manage limited resources
- Justify current program funding
- Support the need for increased levels of funding
- Document program accomplishments
- Document program development and activities to help ensure successful replication

The Process

- Tracking all potential participants' "referral source" by asking, ***"How did you hear about us?"***
 - Standardizing data entry by collapsing all qualitative entries into cohesive themes
 - Capturing direct and indirect referrals to assess the extent to which ADRC programs facilitate research enrollment
 - i.e. QOL programs, MAP, Memory Screening Days

The Process

- Attempts to assist potential participants in remembering the referral source
 - MD prescription pads
 - ADRC Community Tear Off Flyer with color coded stars that denote type of venue
 - Red = Medical office
 - Gold = Senior Living
 - Green = Library
 - Blue = Senior Centers



University of California, San Diego

DO YOU OR SOMEONE YOU KNOW HAVE CONCERNS ABOUT MEMORY?
We can help.

▼ PLEASE TAKE ONE ▼
MEMORY LOSS?

We need individuals concerned about mild-to-moderate changes in memory and those recently diagnosed with Alzheimer's disease, Lewy Body dementia, or Frontotemporal dementia to participate in important memory research.

WE OFFER THE FOLLOWING PROGRAMS AND SERVICES AT NO COST TO YOU:

- Thorough memory evaluations and annual neurologic and physical exams
- Clinical trials
- Community outreach and education
- Programs to enhance quality of life for people with memory loss and their families
- Bilingual*, bicultural staff to provide evaluations in English or Spanish

University of California, San Diego
Shiley-Marcos Alzheimer's Disease Research Center

For more information, contact:
Christina Gigliotti, Ph.D.
(858) 622-5800
**Bilingual (Spanish/English) are encouraged to ask for Frances Martinez-Goodrich, MSW*

Visit our website at <http://adrc.ucsd.edu>

The Process

- Documentation of all outreach efforts and media campaigns
 - Talk library and calendar
 - Community flyer placement spreadsheet
 - Physician outreach spreadsheet
 - Document capturing monthly media coverage and community event participation

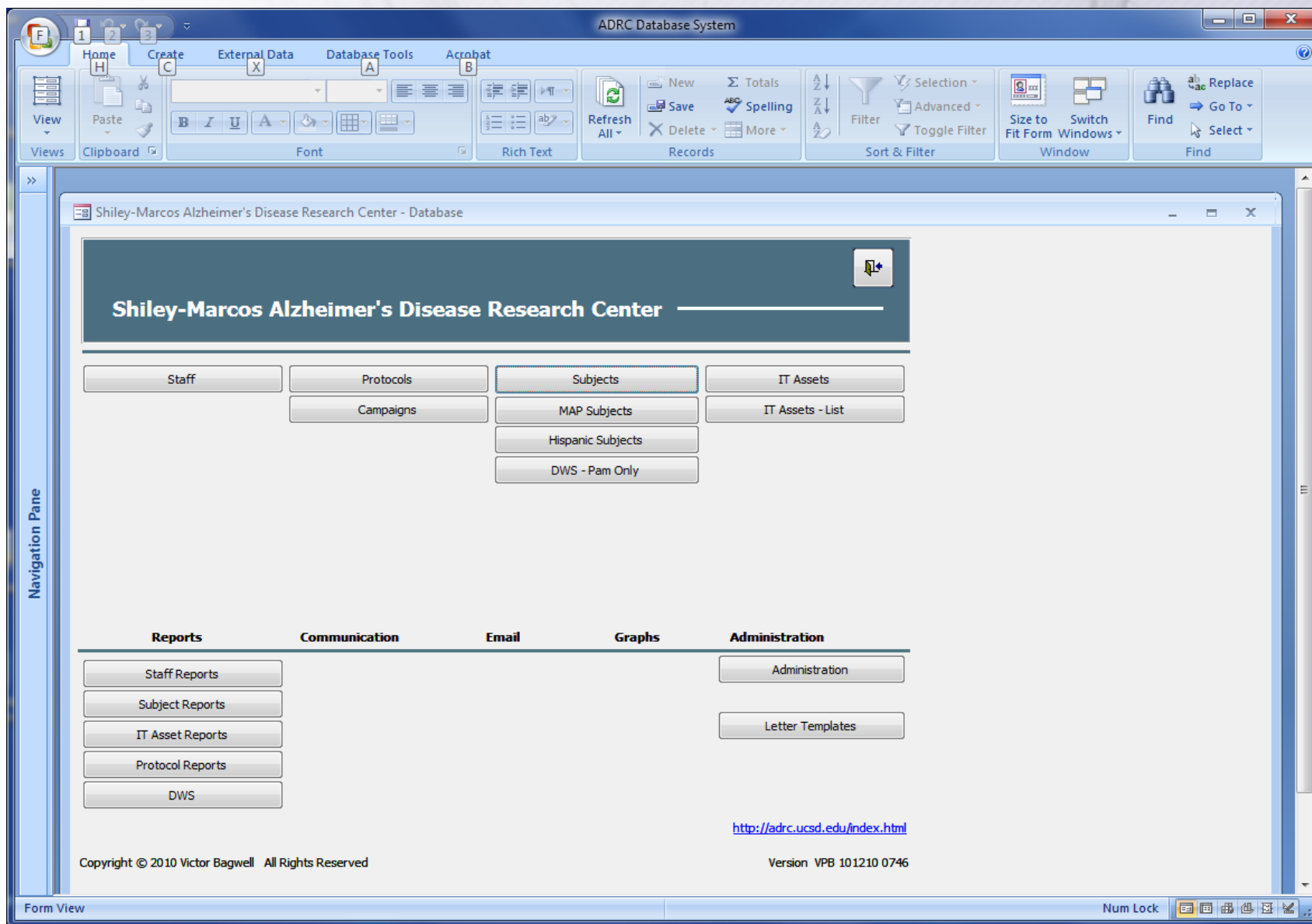
The Tools

- “You can’t expect to meet the challenges of today with yesterday’s tools and expect to be in business tomorrow.”



The New ADRC Clinical Research Database

- Combined all data and fields from what was previously 5 separate databases
 - Each previous system was developed and utilized by different users
 - Previous systems utilized variety of Microsoft Office software programs
 - None of the previous systems interacted with one another
 - Some overlapping data/fields in each system yet inconsistencies in coding



ADRC Database System

Home Create External Data Database Tools Acrobat

View View Views

Cut Copy Paste Format Painter

Font

Rich Text

Refresh All New Save Delete Records

Totals Spelling More

Filter Sort & Filter

Selection Advanced Toggle Filter

Size to Fit Form Switch Windows

Find Replace Go To Select

frm_subject

Subjects

Find

Subject ID

ADRC #

Name First Middle Last Initials

DWS Detail

- Add Subject

Contacts Consents Demographics Protocols Assigned Status Visits Scores - BBL Recruitment Screen - Mem Dx Screen - Med Hx Screen - Drug Hx MAP MAP - NeuroPsych Soc Work

Subject Informant Next of Kin Facility Unknown

Contact Type Subject Live Alone ☐ Lives With

Mailing Address With Whom Subject Live

In SNF

Salutation

Title

Facility / Company

Street

Street2:

City:

State Zip:

Facility Contact

Comment

Email 1

Email 2

Tel Home

Tel Work

Tel Mobile

Other Tel

Record: 6428 of 6428 No Filter Search

Form View

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ADRC Database System

Form Layout Tools

Home Create External Data Database Tools Acrobat Format Arrange

View Paste Cut Copy Format Painter Clipboard Font Rich Text Refresh All New Save Spelling Delete More Filter Selection Advanced Size to Fit Form Switch Windows Find Replace Go To Select

frm_subject

Consent to include in Registry (info this database) ☐ **Exclude from ALL studies** ☒ Reason excluded Date Excluded

Date Initial Contact Referral Source MD Name: Referral Comment

Latest Contact date Reason for call: Person Interviewed

Comments

MAP Assigned Call Back Date 7d 1m 6m 1yr

Medical Records

Physician Name	Organization	Department	Telephone	Fax	Sent	Request Date	Response Date	Note
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Record: 1 of 1

Recruitment Tracking

Status Status Date Adrc #

Protocol	Entity	Subject Type	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tracking Step	Submit 1	Submit 2	Received	Complete
Authorization / Packet	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Medical Records Request	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Referred for Review	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Call Back Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Assigned To

Pending Reason

Exclude Reason

Documents

- ☐ Referred MD Letter 1
- ☐ Referred MD Letter 2
- ☐ Referring MD Authorization Letter

Record: 6428 of 6428

Layout View

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frm_subject - ADRC Database System

Home Create External Data Database Tools Acrobat

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>> Contacts Consents Demographics Protocols Assigned Status Visits Scores - BBL Recruitment Screen - Mem Dx Screen - Med Hx Screen - Drug Hx MAP MAP - NeuroPsych Soc Work

Consent to include in Registry (info this database) ☐ **Exclude from ALL studies** ☐ **Reason excluded** **Date Excluded**

Date Initial Contact Referral Source MD Name: Referral Comment

Latest Contact date Reason for call: Person Interviewed

Comments

MAP Assigned

talk
physician
Free Media Exposure
radio
newspaper
SOCARE
other

Physician Name Organ

Alzheimer's Association
Internal
ADRC Community flyer
Information table
Paid Advertisement

Record: 1 of 1 No Filter Search

Recruitment Tracking

Status Status Date Adrc #

Protocol	Entity	Subject Type	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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Medical Records Request	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Referred for Review	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Call Back Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Assigned To

Pending Reason

Exclude Reason

Documents ☐ Referred MD Letter 1
☐ Referred MD Letter 2
☐ Referring MD Authorization Letter

Record: 6428 of 6428 No Filter Search

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frm_subject - ADRC Database System

Home Create External Data Database Tools Acrobat

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Navigation Pane

Contacts Consents Demographics Protocols Assigned Status Visits Scores - BBL Recruitment Screen - Mem Dx Screen - Med Hx Screen - Drug Hx MAP MAP - NeuroPsych Soc Work

Consent to include in Registry (info this database) ☐ Exclude from ALL studies ☒ Reason excluded Date Excluded

Date Initial Contact Referral Source MD Name: Referral Comment

Latest Contact date Reason for call: Person Interviewed

Comments

ADCS - ADNI
ADCS - ADNI Pilot
ADCS - ADNI-GO/2
ADCS - Cere110-03
ADCS - DHA
ADCS - HBA
ADCS - IGIV infusions, mild to moderate AD (Ph III)
ADCS - RAGE Inhibitor
Allon - Davunetide in PSP Ph II/III
AVID - AVID 133
BMS - BMS 708163 in Prodromal AD
Bondi - Normal Aging Project
Brewer - ADRC vMRI Studies (non-DLB)
Brewer - Quantitative Imaging in Dementia with Lewy Bodies
Ceregene - Cere110-01/Cere110-02
Delano-Wood - White Matter Integrity and Cognition in Middle-Aged and Older adults
Elan - AAB-001-102
Filoteo - Categorization Deficits in PD
Galasko RO1 - Biomarkers in Aging, MCI and AD

7d 1m 6m 1yr Preview Report

Medical Records

Telephone	Fax	Sent	Request Date	Response Date	Note

Recruitment Tracking

Adrc #

Subject Type	Notes

Tracking Step Submit 1 Submit 2 Received Complete

Authorization / Packet

Medical Records Request Assigned To

Referred for Review

Call Back Date 7d 1m 6m 1yr

Pending Reason

Exclude Reason

Documents ☐ Referred MD Letter 1
☐ Referred MD Letter 2
☐ Referring MD Authorization Letter

Record: 6428 of 6428 No Filter Search

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frm_subject - ADRC Database System

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Contacts Consents Demographics Protocols Assigned Status Visits Scores - BBL Recruitment Screen - Mem Dx Screen - Med Hx Screen - Drug Hx MAP MAP - NeuroPsych Soc Work

Consent to include in Registry (info this database) ☐ **Exclude from ALL studies** ☐ Reason excluded Date Excluded

Date Initial Contact Referral Source MD Name: Referral Comment

Latest Contact date Reason for call: Person Interviewed

Comments

MAP Assigned Call Back Date 7d 1m 6m 1yr

Medical Records

Physician Name	Organization	Department	Telephone	Fax	Sent	Request Date	Response Date	Note
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Record: 1 of 1

Recruitment Tracking

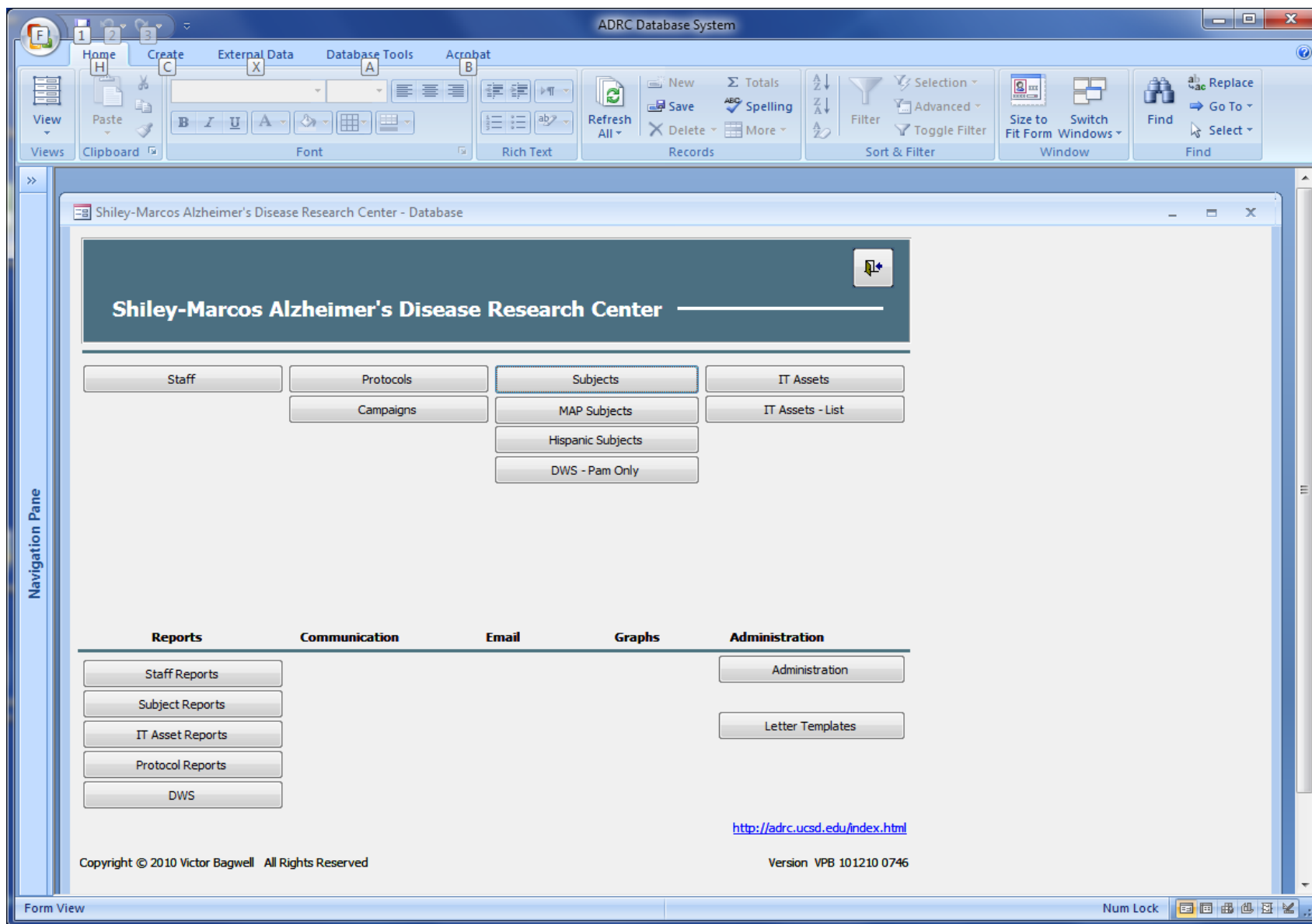
Status Status Date Adrc #

Protocol	Entity	Subject Type	Notes
Tracking Step	awaiting call back from participant/family awaiting completed paperwork/forms awaiting completion of another research protocol	<input type="text"/>	<input type="text"/>
Authorization / Packet	awaiting external medical/clinical procedure/testing awaiting follow up call/correspondence from ADRC	<input type="text"/>	<input type="text"/>
Medical Records Request	awaiting literacy screening (verify with Frances)	Assigned To <input type="text"/>	<input type="text"/>
Referred for Review	awaiting MAP	<input type="text"/>	<input type="text"/>
Call Back Date	awaiting medical records awaiting review of medical records awaiting stabilization of medical condition/medication awaiting verification of study partner's availability	<input type="text"/>	<input type="text"/>
Pending Reason	<input type="text"/>	Documents <input type="checkbox"/> Referred MD Letter 1 <input type="checkbox"/> Referred MD Letter 2 <input type="checkbox"/> Referring MD Authorization Letter	
Exclude Reason	<input type="text"/>		

Record: 6428 of 6428

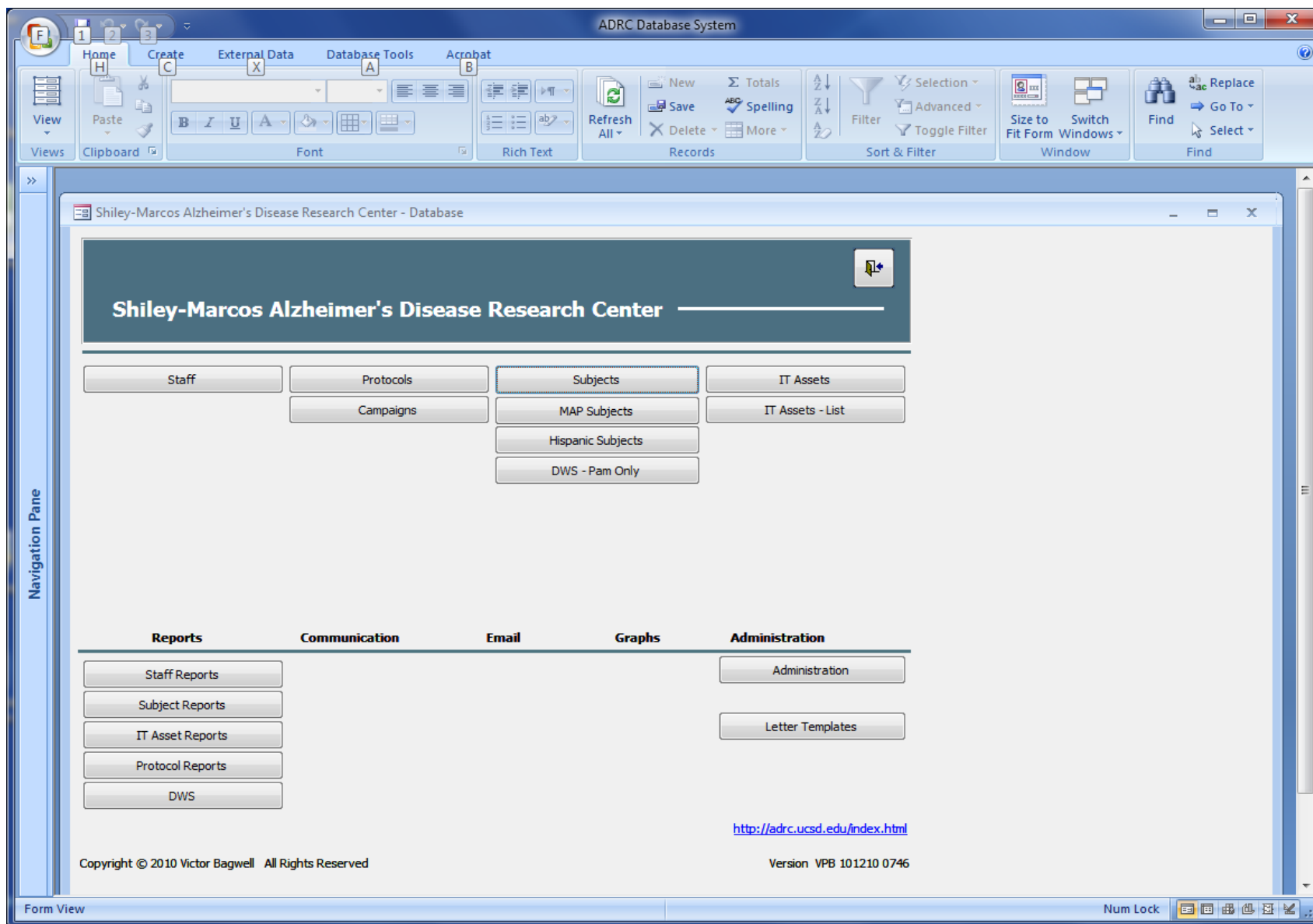
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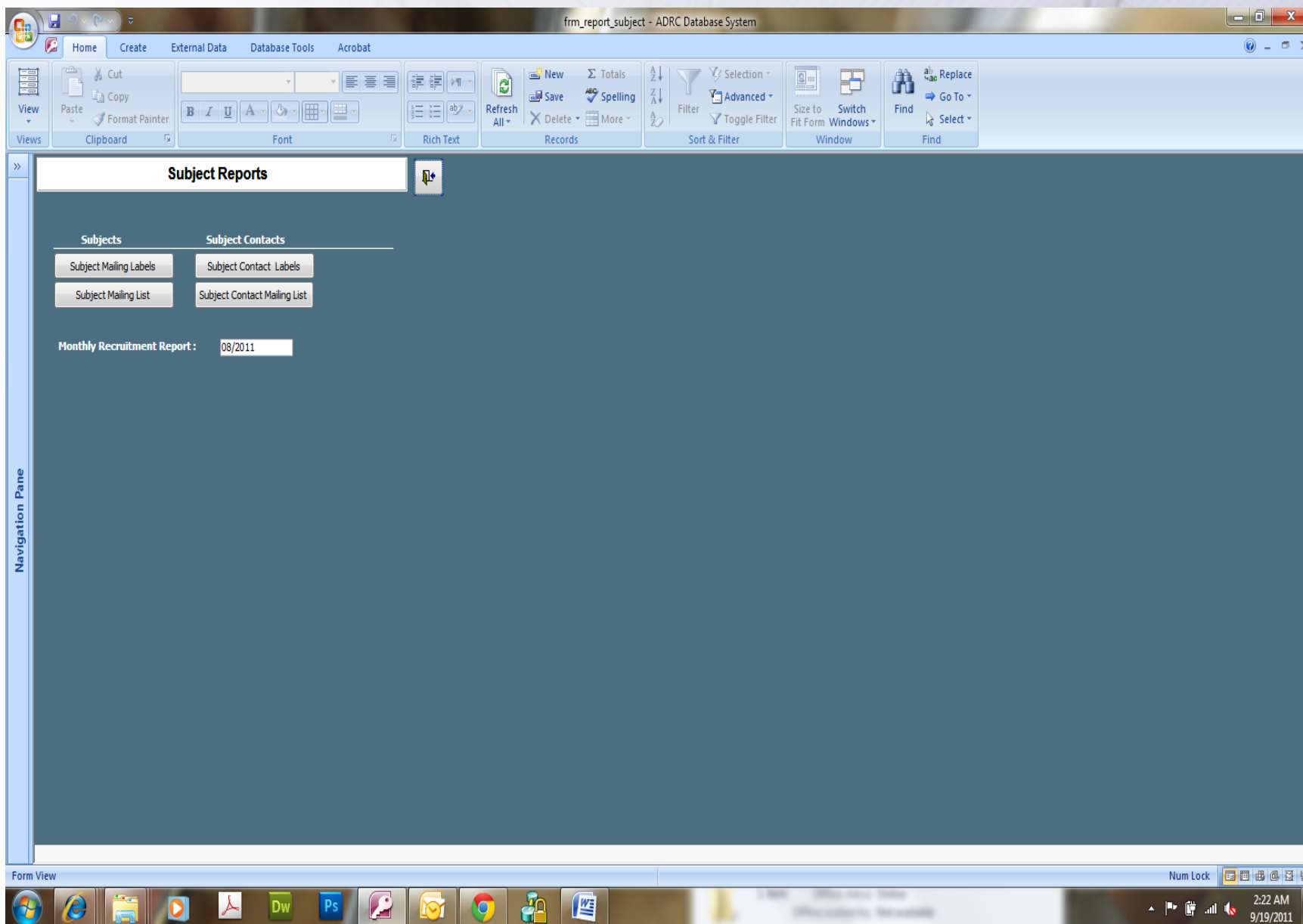
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The Evaluation

- Monthly recruitment report presented to the clinical core
 - Review current numbers in each cell
 - Review recent enrollees' referral source in accordance with diagnosis
- Executive Committee Meetings
- External Advisory Meetings
- Progress Report
- NIH Grant Resubmission





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Monthly Recruitment Report

Month : 08 Year : 2011 Total Longitudinal Enrollments :

Referrals made from Registry

				Hispanic
ADCS - ADNI-GO/2	Pending	1		
ADCS - Cere110-03	Excluded	1	1	
ADCS - Cere110-03	Pending	1	0	
Bondi - Normal Aging Project	Enrolled	10		
Bondi - Normal Aging Project	Pending	2		
Bondi - Normal Aging Project	Excluded	1		
Brewer - ADRC vMRI Studies (non- DLB)	Declined	1		
Brewer - Quantitative Imaging in Dementia with Lewy Bodies	Pending	1	0	
Delano-Wood - White Matter Integrity and Cognition in Middl	Pending	2		
Delano-Wood - White Matter Integrity and Cognition in Middl	Enrolled	8		

Record: 1 of 28 No Filter Search

Source of Referral for Longitudinal Enrollments

Source	Count
Internal	5
other	1
physician	3

Record: 1 of 3 No Filter Search

Dx for Enrolled

Dx	Total	non-Hispanic	Hispanic
AD	2	2	
Dementia	1	1	
DLB	1	1	
MCI	1	1	
No Diagnosis	1	1	
Normal Control	3	3	

Record: 1 of 6 No Filter Search

Source of Referral for Longitudinal Acceptments

Source	Count
Internal	2
other	3

Record: 1 of 3 No Filter Search

Dx for Accepted

Dx	Total	non-Hispanic	Hispanic
AD	1	1	
CBDG	1	1	

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Record: 1 of 28 No Filter Search

Source	Count
Internal	5
other	1
physician	3

Record: 1 of 3 No Filter Search

Record: 1 of 28 No Filter Search

Dx	Total	non-Hispanic	Hispanic
AD	2	2	
Dementia	1	1	
DLB	1	1	
MCI	1	1	
No Diagnosis	1	1	
Normal Control	3	3	

Record: 1 of 6 No Filter Search

Record: 1 of 28 No Filter Search

Dx	Total	non-Hispanic	Hispanic
AD	1	1	
CBDG	1	1	
DLB	1	1	
MCI	1	1	
No Diagnosis	2	2	
Normal Control	1	1	

Record: 1 of 6 No Filter Search

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Analysis and Planning

- Assess the successes and maintain or increase efforts in these arenas
- Assess the failures and assess the reasons why these efforts have not been effective
 - Modify implementation or discontinue altogether
 - Survey persons who decline research after initial interest demonstrated to assess reasons for changing mind
- Assess ADRC programs/efforts designed to facilitate enrollment
 - QOL programs, MAP, Memory Screening
- Assess the call/interest to enrollment ratio
 - Assess reasons why there is a disconnect and address when possible
- Assess physicians who do and do not refer
 - Develop tailored approaches/outreach efforts
- Assess cost to benefit ratio of each method/approach
 - Paid advertising or tabling events expense typically not justified in short run

Repeat the Cycle



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