



# National Health and Nutrition Examination Survey (NHANES)

## 24-Hour Urine Study Procedures Manual



January 2014



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# Introduction to the 24-Hour Urine Study

## 1.1 Introduction

There is compelling evidence indicating that excess dietary sodium intake is detrimental to cardiovascular health (e.g., hypertension, left ventricular hypertrophy, congestive heart failure, excess risk of coronary heart disease, stroke) for almost all population groups regardless of age, ethnicity, sex, or health status. It is important to obtain population baseline data on sodium intake prior to any population-based efforts to reduce sodium in the food supply and to monitor trends in intake at the national level subsequent to changes in the food supply.

## 1.2 Background and Justification

The Institute of Medicine, the Pan American Health Organization, and a recently convened National Heart, Lung, and Blood Institute (NHLBI) expert work group all strongly recommended measurement of 24-hour urinary sodium excretion as the most accurate means of monitoring mean sodium intake in the U.S. population. In addition, NHLBI recommended collecting a second 24-hour urine sample in a subsample of those with one 24-hour urine sample to estimate the population distribution (i.e., the proportion of the population that exceeds recommended limits) accounting for day-to-day variation in sodium intake and excretion.

Sodium reduction plays a crucial role in the treatment of hypertension and CVD. Existing NHANES data on prescription medication data, blood pressure, diabetes, CVD, and chronic kidney disease in combination with the currently proposed data on 24-hour urine collections can be used to assess whether those with diagnosed hypertension or other chronic diseases have obtained appropriate treatment at the population level.

## 1.3 Study Protocol

We propose to randomly select half of NHANES nonpregnant participants examined in the Mobile Examination Center (MEC) in 15 survey locations, ages 20-69 years (n=250). Of those who collect a

24-hour urine specimen, half will be randomly selected for participation in a followup 24-hour urine collection 3-10 days after the first 24-hour urine collection is completed. The second urine collection is proposed to account for day-to-day variation within individuals.

### **1.3.1 MEC Recruitment**

During their MEC examination, participants will be asked to participate in the 24-hour urine study. They will each be scheduled two visits for the Urine MEC (UMEC), one to start their urine collection and a second to return their kits and finish their collection.

### **1.3.2 UMEC First Visit**

Upon arriving for the first appointment, a urine collection kit will be given to the participant to use for collecting urine samples over a 24-hour period. The kit will contain instructions on how to collect and return the urine specimen. Study staff will open the kit, explain the contents, and provide written instructions.

- To start collection, the participant will be asked to empty his or her bladder.
- Drinking water will be available to help individuals void, if needed.
- The time of the void is recorded, the urine sample discarded, and the participant is asked to collect all urine from that moment for a period of 24 hours.

Each participant will be randomly assigned to collect the 24-urine samples either on a weekday or on a weekend day. When the day after the MEC examination is consistent with the randomly assigned period of the week (weekday or weekend), we will ask the participant to begin his or her urine collection the following day if possible.

- If in the course of scheduling the 24-hour urine start appointment the participant indicates it is impossible for him or her to collect the specimen during the assigned period of the week (weekday or weekend), he or she will not be excluded from participation but will be allowed to schedule urine collection at his or her convenience.
- In addition to starting the 24-hour urine collection in the UMEC, participants will be asked to complete the urine collection in the UMEC and return 24 hours later.

- This return visit appointment will be scheduled in the MEC, at the same time the initial visit is scheduled.
- If the participant can't come back in 24 hours he or she must schedule a time within 48 hours of the start of collection to return the urine.
- It is preferred that participants begin and end the collection in the UMEC; however, individuals' schedules may not always allow for this.
- We have allowed for flexibility by providing instructions on starting and/or ending collection at the UMEC or in the home, depending on participants' availability.

### **1.3.3 Completion Questionnaire—UMEC Second Visit**

A set of completion questions will be used to assess the completeness of the urine collection. A remuneration of \$100 will be given to the participant at the end of the questionnaire, plus a transportation allowance.

### **1.3.4 Second 24-Hour Urine Collection**

One-half of the participants who successfully completed the first collection will be invited to collect a second 24-hour urine.

- If the participant agrees, the second 24-hour urine collection will be scheduled 3–10 days later, but not on the same day of the week as the first 24-hour urine collection.
- If the participant indicates it is impossible to collect the second urine on a different day of the week from the first he or she will be allowed to collect on the same day of the week as the first collection. Verbal consent will be obtained.
- The same followup questions will be asked upon the completion of the second 24-hour urine collection.
- A remuneration of \$100 and a transportation allowance will be given to the participant at the end of second urine collection.

### 1.3.5 Processing 24-Hour Urine Specimens

All 24-hour urine collections will be processed as described in Chapter 9. The 24-hour urine collection will be assessed for completeness using the Completion Questionnaire. The urine specimen will be considered “Incomplete” and will not be processed if:

- The start and end time of the collection was not recorded and cannot be ascertained.
- The length of collection time is less than 22 hours.
- The total volume of urine is less than 400 ml.
- A female participant was menstruating during the urine collection (Item FQ1, Completion Questionnaire, Attachment F).
- More than a few drops of urine were missed during collection (items FQ2-FQ8 on Completion Questionnaire, Attachment F).

All urine specimens collected over a period of at least 22 hours that meet other criteria for completeness will be processed (weighed, aliquoted and shipped). NCHS will determine whether specimens collected over a 26-hour + time frame will be included in the analytic sample.

### 1.3.6 Home Urine Collection

After completing the 24-hour urine collection, all participants will be asked to participate in the Home Urine Collection (HUC) component.

- The HUC protocol is scheduled after the 24-hour urine to prevent any deleterious effect on the response rate to the 24-hour urine collection during the pilot study.
- Participants selected for the 24-hour urine pilot study will be asked to participate in the HUC after they have finished with their 24-hour urine collection(s).

### 1.3.7 Scheduling Sample Persons (SPs) Using the Field Followup Management System (FFMS)

The FFMS system will record the time at which the reminder calls were made.



- Participants will receive a phone call to remind them of their appointment to start the urine collection (unless their start date is the following day).
- If a participant does not have a phone where he or she can be reached, an NHANES staff member will make a personal visit to remind him or her of their appointment to start urine collection.

### **1.3.8 24-Hour Urine Terminology**

- Phase 1 = SP picking up first 24-hour urine collection kit
- Phase 2 = SP returning his or her first 24-hour urine
- Phase 3 = SP picking up second 24-hour collection kit
- Phase 4 = SP returning his or her second 24-hour urine

## 24-Hour Urine Recruitment

# 2

Dietary Interviewers and Phlebotomists will be the main recruiters for the 24-Hour Urine Component. If the Phlebotomist is absent, then the Medical Technologist performing Phlebotomist duties will also do the recruitment. This section goes through the recruitment and scheduling process, screen by screen.

### ***Accessing the Program***

Log into the 24-Hour Urine Recruitment program by double clicking on the icon located on your desktop (Exhibit 2-1). You will log into this application the same way you do for the phlebotomy and dietary components. To see assignments from the coordinator, you must minimize all applications on the computer.

**Exhibit 2-1. 24-hour urine icon**



### ***Recruitment Script***

The first screen (Exhibit 2-2) introduces the SP to the importance of participating in the 24-Hour Urine Component. Read it exactly as written. There are two introduction scripts for each position. One introduction script is if the SP finishes one component with you and then you begin 24-Hour Recruitment. The other script is to be used when the SP is assigned to your room for the 24-Hour Recruitment.

**Exhibit 2-2. 24-hour urine recruitment script**

READ IF IMMEDIATELY AFTER PHLEBOTOMY:  
We are done with your blood draw. Now I will tell you about the 24-hour urine collection.

READ IF IMMEDIATELY AFTER DIETARY:  
We are done with the dietary interview. Now I will tell you about the 24-hour urine collection.

READ IF NOT IMMEDIATELY AFTER PHLEBOTOMY/DIETARY:  
I'm going to tell you about the 24-hour urine collection.

We would like to learn more about the nutrition of people living in the U.S., by examining people's urine. We ask that you collect all your urine over a 24-hour period. This includes any time you are away from home during those 24 hours. Your participation is voluntary.

You will need to come to our urine mobile exam center, parked next to this one, for two short visits. The first visit will take about 15 minutes. At this visit we will ask you to empty your bladder (urinate). You will also receive instructions and a urine collection kit to take home.

Once you have collected your urine for 24-hours, you will take the urine back to the same place. This second visit will take about 10 minutes and you will be asked to answer some questions. When you return your urine sample you will receive \$100 as a thank you for your time and effort.

May I schedule your two visits?

IS SP WILLING TO PARTICIPATE?

Reason for refusal to participate in the 24-Hour Urine collection

If the SP agrees to participate, select “Yes” and press **Enter** (Exhibit 2-3)

**Exhibit 2-3. Agreement schedule**

24 Hour Urine Recruitment: Stand:615761 Session:615761 11/10/2010 01:30 pm - 05:30 pm

File View Utilities Reports Window Help

SP ID: 354189 Name: 177, PERSON Age: 20 years Gender: Female Date: 12/11/2013 Time: 04:48 PM

24 Hour Urine Recruitment

READ IF IMMEDIATELY AFTER PHLEBOTOMY:  
We are done with your blood draw. Now I will tell you about the 24-hour urine collection.

READ IF IMMEDIATELY AFTER DIETARY:  
We are done with the dietary interview. Now I will tell you about the 24-hour urine collection.

READ IF NOT IMMEDIATELY AFTER PHLEBOTOMY/DIETARY:  
I'm going to tell you about the 24-hour urine collection.

We would like to learn more about the nutrition of people living in the U.S., by examining people's urine. We ask that you collect all your urine over a 24-hour period. This includes any time you are away from home during those 24 hours. Your participation is voluntary.

You will need to come to our urine mobile exam center, parked next to this one, for two short visits. The first visit will take about 15 minutes. At this visit we will ask you to empty your bladder (urinate). You will also receive instructions and a urine collection kit to take home.

Once you have collected your urine for 24-hours, you will take the urine back to the same place. This second visit will take about 10 minutes and you will be asked to answer some questions. When you return your urine sample you will receive \$100 as a thank you for your time and effort.

May I schedule your two visits?

Reason for refusal to participate in the 24-Hour Urine collection

Yes  
No

1 of 3

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 12.0.0 Not connected to Coordinator 04:44 PM

### Select Date and Time for Interview

The scheduling screen is shown below (Exhibit 2-4). You will be scheduling two appointments, a date and time to pick up the urine kit and a date and time to return the kit. There is a short script at the top of this page that will be read verbatim. The third sentence should be read to females only.

**Exhibit 2-4. Scheduling screen**

**24 Hour Urine Recruitment: Stand:615 Session:615220 09/17/2010 08:30 am - 12:30 pm**

SP ID: 480262 Name: 255, PERSON Age: 38 years Gender: Female Date: 02/27/2014 Time: 02:38 PM

**Schedule initial 24 Hour Urine Appointment**

We will need you to be prepared to begin to collect your urine on the day of the first visit. For your second visit, we ask you to return with your urine, 24 hours later.  
 FOR FEMALES: Please pick a day when you won't be menstruating.

Let's schedule your first appointment.

Other Family Members

Name	Age	Appointment Time	Next Appointment	Spanish
<b>Females Only</b>				

Please Select One of the Following Appointments

Show All Pickup Times ☒ Show All Return Times ☐

Pick up urine kit from UMEC			Return kit to the UMEC			
Date	Day of Week	Time	Date	Day of Week	Time	Schedule
02/27/2014	Thursday	12:00 PM	02/28/2014	Friday	12:00 PM	24 <input checked="" type="checkbox"/>
02/27/2014	Thursday	12:30 PM	02/28/2014	Friday	12:30 PM	24 <input type="checkbox"/>
02/27/2014	Thursday	12:30 PM	02/28/2014	Friday	12:30 PM	24 <input type="checkbox"/>
02/27/2014	Thursday	01:00 PM	02/28/2014	Friday	01:00 PM	25 <input type="checkbox"/>
02/27/2014	Thursday	01:00 PM	02/28/2014	Friday	01:00 PM	25 <input type="checkbox"/>
02/27/2014	Thursday	01:30 PM	02/28/2014	Friday	01:00 PM	25 <input type="checkbox"/>

Not Scheduled ☐  
 Reason   
 Appointment Notes

Ready MEC Layer: 1/3/2014 Application: 12.0.0 Not connected to Coordinator 02:52 PM

The scheduling screen is divided into five sections: Other Family Members, Pickup Appointment, Return Appointment, Not Scheduled, and Appointment Notes (Exhibit 2-5).

**Exhibit 2-5. Scheduling screen sections**

**24 Hour Urine Recruitment: Stand:615 Session:615740 11/08/2010 08:30 am - 12:30 pm**  
 SP ID: 950047 Name: 551, PERSON Age: 26 years Gender: Female Date: 04/14/2014 Time: 11:13 AM

**Schedule initial 24 Hour Urine Appointment**

We will need you to be prepared to begin to collect your urine on the day of the first visit. For your second visit, we ask you to return with your urine, 24 hours later.  
 FOR FEMALES: Please pick a day when you won't be menstruating.

Let's schedule your first appointment.

**Other Family Members**

Name	Age	Appointment Time	Next Appointment	Spanish
PERSON 17	26			No

**Please Select One of the Following Appointments**

Show All Pickup Times ☐ Show All Return Times ☐

**Pick up urine kit from UMEC**

Date	Day of Week	Time
04/14/2014	Monday	08:30 AM
04/14/2014	Monday	09:00 AM
04/14/2014	Monday	09:30 AM
04/14/2014	Monday	10:00 AM
04/14/2014	Monday	10:30 AM
04/14/2014	Monday	11:00 AM
04/14/2014	Monday	11:30 AM

**Return kit to the UMEC**

Date	Day of Week	Time	Hours	Schedule
04/15/2014	Tuesday	08:30 AM	24	<input checked="" type="checkbox"/>
04/15/2014	Tuesday	09:00 AM	24	<input type="checkbox"/>
04/15/2014	Tuesday	09:30 AM	25	<input type="checkbox"/>
04/15/2014	Tuesday	10:00 AM	25	<input type="checkbox"/>
04/15/2014	Tuesday	10:30 AM	26	<input type="checkbox"/>
04/15/2014	Tuesday	11:00 AM	26	<input type="checkbox"/>

**Not Scheduled**

Not Scheduled Reason

**Appointment Notes**

Appointment Notes

**Pickup Appointment**

**Return Appointment**

**Appointment Notes**

### ***Other Family Members***

This section lists any family member that is eligible to participate in the 24-hour urine component. His or her name and age will be listed. If the family member has been recruited, the 24-hour appointment days and times will be listed. If the family member speaks Spanish, “Yes” will be shown under the word “Spanish.” For all other languages, “No” will be shown.

**Exhibit 2-6. Family members**

Other Family Members				
Name	Age	Appointment Time	Next Appointment	Spanish
PERSON 17	26			No

### ***Pickup Times***

Available appointments are shown in green and are listed under “Pickup urine kit from UMEC” (Exhibit 2-7). To see more appointment slots, use the scroll bar. Respondents are randomly preselected to complete their collection on either a weekday or weekend. If the respondent cannot collect the urine on the preselected day, click on “Show All Pickup Times.” The preferred days will be shown in green. The appointments shown in black are outside of the preselected appointment (Exhibit 2-8). To schedule an appointment highlight the selected date and time.

**Exhibit 2-7. Preferred day**

**Show All Pickup Times**

Please Select One of the Following Appointments

Show All Pickup Times ☐

Pick up urine kit from UMEC

Date	Day of Week	Time
04/14/2014	Monday	08:30 AM
04/14/2014	Monday	09:00 AM
04/14/2014	Monday	09:30 AM
04/14/2014	Monday	10:00 AM
04/14/2014	Monday	10:30 AM
04/14/2014	Monday	11:00 AM
04/14/2014	Monday	11:30 AM

**Scroll bar**

**Exhibit 2-8. Show all pickup times**

Please Select One of the Following Appointments -  
Show All Pickup Times ☒

Pick up urine kit from UMEC

Date	Day of Week	Time
04/27/2014	Sunday	12:30 PM
04/27/2014	Sunday	01:00 PM
04/27/2014	Sunday	01:30 PM
04/27/2014	Sunday	02:00 PM
04/27/2014	Sunday	02:30 PM
04/27/2014	Sunday	03:00 PM
04/27/2014	Sunday	03:30 PM

On occasion you will see appointments to pick up a kit, but there are no corresponding return appointments. This occurs when the UMEC technicians are working on the pickup date, but they are not working the next day. You will need to scroll through the appointments until you can schedule both a pickup time and a return time. If this happens at the end of a stand, click on the Not Scheduled box and select “No Appointment Available.” Please inform the respondent that because of time constraints he or she will not be able to participate.

**Exhibit 2-9. No return appointment**

Please Select One of the Following Appointments -

Show All Pickup Times ☒

Pick up urine kit from UMEC

Date	Day of Week	Time
12/26/2014	Friday	01:30 PM
12/26/2014	Friday	02:00 PM
12/26/2014	Friday	02:30 PM
12/26/2014	Friday	03:00 PM
12/26/2014	Friday	03:30 PM
12/26/2014	Friday	04:00 PM
12/26/2014	Friday	04:30 PM

Show All Return Times ☒

Return kit to the UMEC

Date	Day of Week	Time	Hours	Schedule
------	-------------	------	-------	----------

Not Scheduled ☒

Reason

No appointment available

Refused

Schedule later

### ***Return Times***

The system will automatically highlight the return appointment time for 24 hours later. If the SP cannot return exactly 24 hours later, use the scroll bar to see later times. As you scroll through these appointment times, you will see the hour difference between the first appointment and second appointment. If the SP needs to return before the 24-hour time frame, click on “Show All Return Times” (Exhibit 2-10). These times will be in black, because they are not the preferred times. Once you have selected a return time, click on box under the word “Schedule.”

**Exhibit 2-10. Return times**

Return kit to the UMEC

Date	Day of Week	Time	Hours	Schedule
04/15/2014	Tuesday	09:30 AM	22	<input type="checkbox"/>
04/15/2014	Tuesday	10:00 AM	22	<input type="checkbox"/>
04/15/2014	Tuesday	10:30 AM	23	<input checked="" type="checkbox"/>
04/15/2014	Tuesday	11:00 AM	23	<input type="checkbox"/>
04/15/2014	Tuesday	11:30 AM	24	<input type="checkbox"/>
04/15/2014	Tuesday	12:00 PM	24	<input type="checkbox"/>

Check box to schedule appointment

Hours between first and second appointment

If you forget to check the schedule box, you will get the following message (Exhibit 2-11).



**Exhibit 2-11. Scheduling error**

The screenshot shows a software interface for scheduling appointments. A modal dialog box titled "Scheduling Error" is displayed in the center. The dialog contains an information icon and the following text: "You did not make a 24 hour urine follow-up appointment. Please either select an appointment or indicate a reason for not scheduling one." Below the text is an "OK" button.

In the background, the main interface is visible. It has a header "Please Select One of the Following Appointment" and a checkbox "Show All Pickup Times". Below this are two tables:

Pick up urine kit from UMEC			Return kit to the UMEC				
Date	Day of Week	Time	Date	Day of Week	Time	Hours	Schedule
04/14/2014	Monday	08:30 AM	04/15/2014	Tuesday	08:30 AM	24	<input type="checkbox"/>
04/14/2014	Monday	09:00 AM	04/15/2014	Tuesday	09:00 AM	25	<input type="checkbox"/>
04/14/2014	Monday	09:30 AM	04/15/2014	Tuesday	09:30 AM	25	<input type="checkbox"/>
04/14/2014	Monday	10:00 AM	04/15/2014	Tuesday	10:00 AM	26	<input type="checkbox"/>
04/14/2014	Monday	10:30 AM	04/15/2014	Tuesday	10:30 AM	26	<input type="checkbox"/>
04/14/2014	Monday	11:00 AM	04/15/2014	Tuesday	11:00 AM	26	<input type="checkbox"/>
04/14/2014	Monday	11:30 AM					

To the right of the tables, there is a checkbox "Not Scheduled" and a "Reason" dropdown menu. Below these is a text area labeled "Appointment Notes".

***Not Scheduled***

If you cannot schedule an appointment, you must check the box next to “Not Scheduled” and select a reason in the comment field (Exhibit 2-12).

**Exhibit 2-12. Not scheduled**

The screenshot shows a close-up of the "Not Scheduled" section of the interface. The checkbox "Not Scheduled" is checked. Below it is a "Reason" dropdown menu. The dropdown is open, showing three options: "No appointment available", "Refused", and "Schedule later".

An “Appointment Notes” field is available for you to communicate important information to the UMEC technician. For example, if you could not schedule a respondent because he or she could not commit to a schedule, enter that information along with a suggested date and time to call the respondent to schedule an appointment. If you do not select a reason for Not Scheduled, you will get the following message (Exhibit 2-13).

**Exhibit 2-13. Warning to enter a reason**

The screenshot shows a software interface with a 'Warning' dialog box in the foreground. The dialog box has a blue header with the word 'Warning' and a close button (X). Below the header is an information icon (i) and the text 'Please answer the reason for Not Scheduled.' At the bottom of the dialog box is an 'OK' button. In the background, there is a table titled 'Return kit to the UMEC' and a form on the right.

Date	Day of Week	Time	Hours	Schedule
04/15/2014	Tuesday	08:30 AM	24	<input checked="" type="checkbox"/>
04/15/2014	Tuesday	09:00 AM	24	<input type="checkbox"/>
04/15/2014	Tuesday	09:30 AM	25	<input type="checkbox"/>
04/15/2014	Tuesday	10:00 AM	25	<input type="checkbox"/>
04/15/2014	Tuesday	10:30 AM	26	<input type="checkbox"/>
04/15/2014	Tuesday	11:00 AM	26	<input type="checkbox"/>

On the right side of the interface, there is a form with the following fields:

- 'Not Scheduled' checkbox: ☒
- 'Reason' dropdown menu: [ ]
- 'Appointment Notes' text area: [ ]

### ***Appointment Notes***

Appointment Notes are used to convey important information to the UMEC technician. Two of the most important issues are lack of transportation and the need for interpreters. Other examples of helpful notes would be needs a lift, difficulty walking, walking over to the UMEC today, or needs a home visit.

If a respondent needs a taxi to get to the UMEC, leave the following note (Exhibit 2-14): Please let the respondent know that they don't have to call for a taxi, but that someone in the UMEC will schedule the taxi.

**Exhibit 2-14. Transportation note**

The screenshot shows a window titled 'Appointment Notes'. Inside the window is a text area with the following text:

taxi needed - take 40 minutes  
to get to MEC

Please use the following guideline in scheduling non-English speaking respondents. You will also leave a note regarding the status of the interpreter.

If the SP's MEC interpreter is a family member or an NHANES paid interpreter (not field office or MEC staff) it is preferred that they walk to the UMEC after the SP's MEC appointment to begin collection. To do this the interpreter (either family member or NHANES paid interpreter) must also be able to return 24 hours later with the SP for the return appointment.

**Exhibit 2-15. Schedule interpreter**

If the respondent is a Spanish speaker who is using the MEC staff as the interpreter, the MEC Manager should determine if a MEC staffer has time to walk to the UMEC with the SP to start the collection. However, if the MEC Manager decides to do this, then a MEC staffer must be available to return to the UMEC 24 hours later with the respondent for the return appointment. Therefore, the MEC Manager needs to be aware of the MEC schedule (hours and the number of SPs scheduled) to determine if this will be possible. Overtime can be offered to the MEC staffer if you need him or her to return on a day off or at a time that the MEC was off (e.g., during a split or in the evening). Time back is also approved to use. Please put these SPs on the Not Scheduled list with a comment note. Example: “Needs interpreter, MEC staff may walk SP over if approved by MEC Manager.” Please let your MEC Manager know about this situation (Exhibit 2-16).

**Exhibit 2-16. MEC staff interpreter**

If the first two options do not work, then the MEC recruiter should schedule the SP at least 4 days out so that the UMEC staff can coordinate with the field office to arrange for an interpreter. Please leave a note stating “Contact field office to schedule interpreter.”

#### Exhibit 2-17. Needs interpreter scheduled

Please Select One of the Following Appointments

Show All Pickup Times ☒ Show All Return Times ☐

Pick up urine kit from UMEC

Date	Day of Week	Time
02/27/2014	Thursday	01:30 PM
02/27/2014	Thursday	01:30 PM
02/27/2014	Thursday	02:00 PM
02/27/2014	Thursday	02:00 PM
02/27/2014	Thursday	02:30 PM
02/27/2014	Thursday	02:30 PM
02/27/2014	Thursday	03:00 PM

Return kit to the UMEC

Date	Day of Week	Time	Hours	Schedule
02/28/2014	Friday	01:30 PM	24	<input type="checkbox"/>
02/28/2014	Friday	01:30 PM	24	<input type="checkbox"/>
02/28/2014	Friday	02:00 PM	24	<input type="checkbox"/>
02/28/2014	Friday	02:00 PM	24	<input type="checkbox"/>
02/28/2014	Friday	02:30 PM	25	<input type="checkbox"/>
02/28/2014	Friday	02:30 PM	25	<input checked="" type="checkbox"/>

Not Scheduled ☐

Reason

Appointment Notes

Contact FO to schedule interpreter

If the SP refuses, be prepared to convince him or her of the importance of the interview. Say something like:

“We cannot ask everyone to be in our study. You are special because you have been chosen to participate. No one else can take your place. We hope that we can answer any concerns or questions you may have to help you want to participate.”

If, after attempting to convert the SP, he or she still refuses, thank him or her for their time. Select “No” from the drop-down table. A field will open below “No” to allow you to type in the reason for the refusal (Exhibit 2-18). Please enter the verbatim reason the SP gives for not wanting to participate.

#### Exhibit 2-18. Refusal

IS SP WILLING TO PARTICIPATE?

Reason for refusal to participate in the 24-Hour Urine collection

I just don't have any more time

### ***Post-Recall Section Status***

This screen (Exhibit 2-19) automatically indicates that the section status is “Complete” if all of the questions in this section were answered. If you had to end the interview before completing any of the screens, the section status will indicate either “Not Done” or” Partial.”

**Exhibit 2-19. Post-recall section status screen**

24 Hour Urine Recruitment: Stand:615 Session:615810 11/15/2010 08:30 am - 12:30 pm

SP ID: 919919 Name: PAYNE, IMA L Age: 21 years Gender: Male Date: 04/13/2014 Time: 06:47 PM

24 Hour Urine Recruitment Status

Status

☒ Complete

☐ Partial

☐ Not Done

Comments

Other text

3 of 3

End of Section Close Exam Finish

If the screen indicates “Not Done” or Partial”, you must enter a comment before finishing the interview. Comments include:

- |                       |                      |
|-----------------------|----------------------|
| Safety exclusion      | Equipment failure    |
| SP refusal            | SP ill/emergency     |
| No Time               | Interrupted          |
| Physical limitation   | Proxy no information |
| Communication problem |                      |

To close the interview, press the **Finish** button on the bottom of the screen.

## Field Followup Management System

# 3

Use the Field Followup Management System (FFMS) system to manage all Urine MEC (UMEC) appointments. Use this system to view, schedule, and reschedule appointments, and to record call results on a daily basis.

From a UMEC perspective, the FFMS has one main purpose and that is to manage the contacts and appointments for UMEC activities, although the FFMS is used by many different people on the NHANES study and serves many different purposes. It has been modified for the UMEC Lab Techs, but was not specifically designed for 24-Hour Urine Pilot Study and for this reason, it may display some fields that will not be used by the UMEC Lab Techs. All FFMS procedures that are needed to manage appointments are covered in this chapter. The actual data collected during the examination process will be recorded using the 24-Hour Compliance application.

The first and second appointment for an SP's 24 Hour Urine participation will normally be scheduled by a MEC staff member after completion of the MEC exam. Each Lab Tech will have a specific work schedule (days and hours) and will be assigned specific SPs. The Lab Tech work schedule and languages spoken will be programmed in the MEC application and will be used when making appointments.

Once an appointment has been scheduled, it is the Lab Tech's responsibility to contact the SP again a day before the appointment. During this call:

- Follow the appointment reminder call script.
- If the SP needs to reschedule, then schedule the appointment for a time that is most convenient for the SP.

In addition to conducting reminder calls for previously scheduled appointments, Lab Techs are responsible for scheduling appointments for SPs who were not scheduled at the time of their MEC exam. Procedures for scheduling these appointments are covered later in this chapter. It is important for the Lab Techs to print the reminder call list and the daily report at the start of each day.

Finally, during the course of the workday, record each attempt to contact an SP in the FFMS.

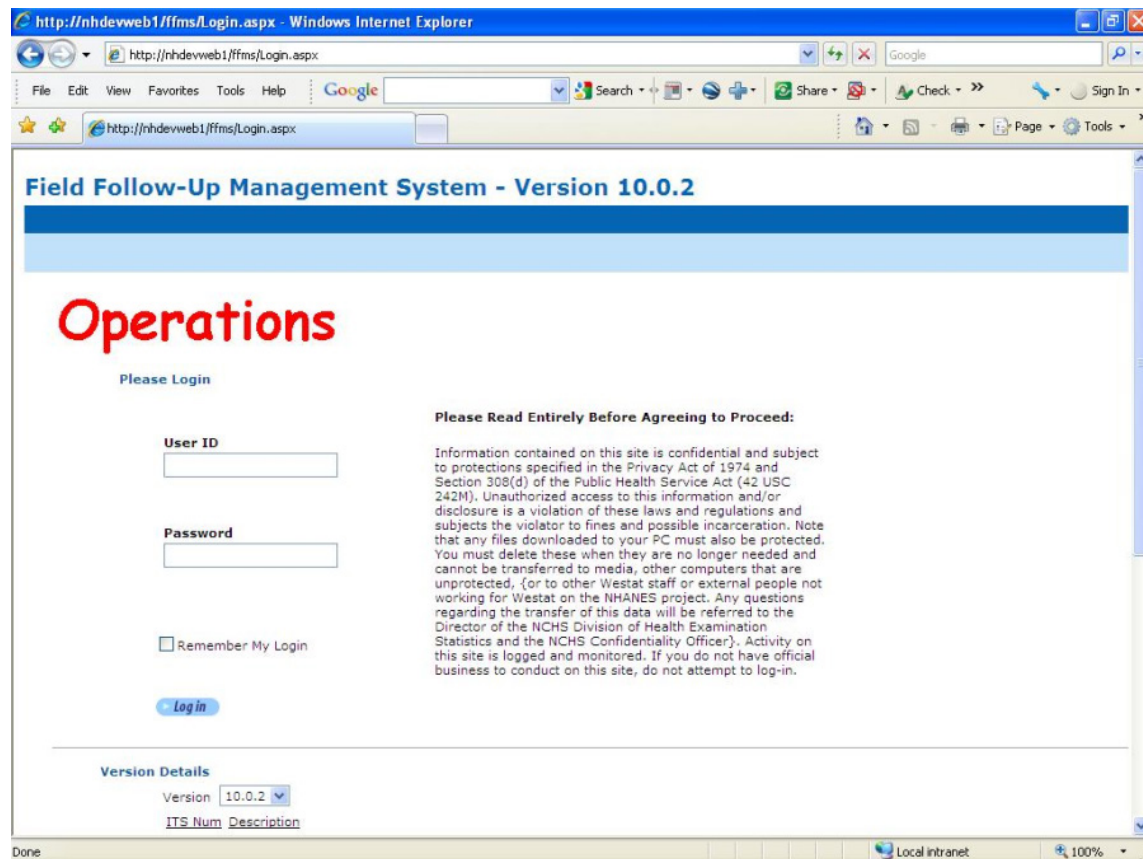
## 3.1 Logging onto the FFMS

To begin using the FFMS, double click on the FFMS icon:



The log-on screen will appear (Exhibit 3-1).

**Exhibit 3-1. FFMS log-on screen**

The screenshot shows a web browser window titled "http://nhdevweb1/ffms/Login.aspx - Windows Internet Explorer". The address bar shows "http://nhdevweb1/ffms/Login.aspx". The page has a blue header with the text "Field Follow-Up Management System - Version 10.0.2". Below the header, the word "Operations" is written in large red letters. Under "Operations", there is a section titled "Please Login" with two input fields: "User ID" and "Password". Below these fields is a checkbox labeled "Remember My Login" and a blue button labeled "Login". To the right of the login fields, there is a section titled "Please Read Entirely Before Agreeing to Proceed:" followed by a paragraph of text regarding confidentiality and data protection. At the bottom of the page, there is a section titled "Version Details" with a dropdown menu showing "10.0.2" and a table with columns "ITS Num" and "Description". The browser's status bar at the bottom shows "Done" and "Local intranet".

Enter user ID as “last name\_first initial.” Enter your password and click on the blue log-on button.

## 3.2 Summary of FFMS Functions

This is the main screen (Exhibit 3-2) that will show after you sign into the FFMS. The following is an overview of the main functions of this system:

**Contact Manager.** Use this header to search for current phone and address information.

**Appointment Manager.** Use this header to view appointments by day, week, or month, and to access the New Appt., Reschedule, Appt. Monitor, and Not Sched. Tabs.

**Reminder Calls.** Use this header to display and print information daily as needed to make reminder calls for upcoming appointments.

**Call History.** Use this header to search for the call history for an SP, enter result codes, and to reschedule an appointment.

**Reports.** Will not be used by the Lab Techs at this time.

Exhibit 3-2. FFMS main screen

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

24 UC

Contact Manager Appointment Manager Reminder Calls Call History Reports Supervisor

24 HR Urine Appointment Manager

Filter Criteria (Optional)

Stand: 617 616 615 Interviewer: Dynelle Longto GRACE HALL Kerry Horton Appt. Status: Scheduled, Firm Appt. Scheduled, Tentative Appt. Not Scheduled, Broken Appt.

Day Week Month New Appt. Reschedule Appt. Monitor Not Sched.

Select A Day to View Appts

December 2013

Sun Mon Tue Wed Thu Fri Sat

24 25 26 27 28 29 30

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31 1 2 3 4

Wednesday, December 18, 2013 View Daily Report

8:45 AM	212708	<a href="#">ARUNA GANDHI</a> 1	60yrs	Return 2nd Kit(4)	Appt. Completed	615 Stephen Bernas	Rem:	
10:15 AM	873038	<a href="#">PERSON 506</a>	35yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
2:45 PM	140024	<a href="#">KIM PIERCE</a> 4	45yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	



The quickest and easiest way to see an overview of scheduled appointments is by using the day, week, or month tabs under the Appointment Manager link. These tabs display a calendar view of the appointments for a given day, week, or month. The month is the most helpful for this component.

### **3.3 Viewing Appointments Using the Day Tab**

As shown in the previous section, the day tab (Exhibit 3-3) in the appointment manager section of the FFMS is the default screen upon signing onto the system. Use the day tab to view all of the appointments for a given day. The day tab shows the appointment times, the SP's ID and name, appointment status, and the name of the Lab Tech with whom the appointment is scheduled. There are more appointments scheduled for the day than appears in this screenshot. Use the scrollbar to the right and scroll down to see the rest of the appointments. To view information on a study participant in this screen, do the following:

1. Select the appropriate month by clicking on the  $\leq$  or  $\geq$  symbol on either side of the current month on the calendar.
2. Select the day to view appointments by clicking on the date within the calendar. It appears highlighted in blue.
3. The appointments for that date appear to the right of the calendar
4. Clicking on an SP's underlined name will display the call history. If needed, enter a call record or reschedule the appointment. If an SP has comments written regarding their appointment, the pencil all the way to the right of the screen will be yellow. If the pencil is "greyed out" there are no comments for the SP.

**Exhibit 3-3. The Day tab in the Appointment Manager section**

**Field Follow-Up Management System - Version 10.5.0** You signed in as Maureen McTigue [Log Out](#)

**TB** 24 UC

[Contact Manager](#) [Appointment Manager](#) [Reminder Calls](#) [Call History](#) [Reports](#) [Supervisor](#)

**24 HR Urine Appointment Manager**

**Filter Criteria (Optional)**

Stand: 617 616 615 Interviewer: Dynelle Longto GRACE HALL Kerry Horton Appt. Status: Scheduled, Firm Appt. Scheduled, Tentative Appt. Not Scheduled, Broken Appt.

**Day** Week Month New Appt. Reschedule Appt. Monitor Not Sched.

**Select A Day to View Appts**

**December 2013**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

**Tuesday, December 17, 2013** [View Daily Report](#)

8:00 AM	212708	<a href="#">ARUNA GANDHI 1</a>	60yrs	Obtain 2nd Kit(3)	Appt. Completed	615 Stephen Bernas	Rem: Not Made	
10:15 AM	873038	<a href="#">PERSON 506</a>	35yrs	Return 1st Kit(2)	Appt. Completed	615 Roy Espinosa	Rem: Not Made	
10:15 AM	902727	<a href="#">PERSON 524</a>	38yrs	Return 1st Kit(2)	Appt. Completed	615 Stephen Bernas	Rem: Not Made	
11:00 AM	706730	<a href="#">PERSON 399</a>	41yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made	
11:45 AM	873038	<a href="#">PERSON 506</a>	35yrs	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
11:45 AM	902727	<a href="#">PERSON 524</a>	38yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made	
2:45 PM	140024	<a href="#">KIM PIERCE 4</a>	45yrs	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
8:45 PM	205047	<a href="#">RONAK AMIN 4</a>	24yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	

### 3.4 Viewing Appointments Using the Week Tab

Use the week tab (selected in Exhibit 3-4) for all appointments that are scheduled for a given week. This view differs from the day view in that the SP ID and age do not appear on this screen. There are more appointments scheduled for the week and by using the scrollbar to the right, you can scroll down to see the rest of the appointments. To view this screen, do the following:

1. Click on the Appointment Manager header at the top of the screen.
2. Click on the “Week” tab.
3. Select the appropriate month by clicking on the  $\leq$  or  $\geq$  symbol on either side of the current week on the calendar.
4. Select the specific week to view appointments by clicking on the  $\geq$  next to the appropriate week. It appears highlighted in blue.

5. The appointments for that week will display to the right of the calendar.
6. Clicking on an SP's underlined name will display the call history. If needed, enter a call record or reschedule the appointment.

**Exhibit 3-4. The Week tab in the Appointment Manager section**

**Field Follow-Up Management System - Version 10.5.0** You signed in as Maureen McTighe [Log Out](#)

**24 UC**

[Contact Manager](#) | [Appointment Manager](#) | [Reminder Calls](#) | [Call History](#) | [Reports](#) | [Supervisor](#)

**24 HR Urine Appointment Manager**

**Filter Criteria (Optional)**

Stand:    Interviewer:    Appt. Status:

[Day](#) | [Week](#) | [Month](#) | [New Appt.](#) | [Reschedule](#) | [Appt. Monitor](#) | [Not Sched.](#)

**Select A Week to View Appts**

**December 2013**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

**Sunday, December 15, 2013 - Saturday, December 21, 2013**

12/16/2013	11:45 AM	<a href="#">PERSON 524</a>	Obtain 1st Kit(1)	Appt. Completed	615 Stephen Bernas	Rem: Not Made
12/16/2013	11:45 AM	<a href="#">PERSON 506</a>	Obtain 1st Kit(1)	Appt. Completed	615 Roy Espinosa	Rem: Not Made
12/16/2013	12:30 PM	<a href="#">PERSON 399</a>	Obtain 1st Kit(1)	Appt. Completed	615 Stephen Bernas	Rem: Not Made
12/16/2013	12:30 PM	<a href="#">PERSON 524</a>	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made
12/16/2013	9:30 PM	<a href="#">RONAK AMIN 4</a>	Obtain 1st Kit(1)	Appt. Completed	615 Roy Espinosa	Rem: Not Made
12/16/2013	9:30 PM	<a href="#">SHANAE BROWN 1</a>	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made
12/17/2013	8:00 AM	<a href="#">ARUNA GANDHI 1</a>	Obtain 2nd Kit(3)	Appt. Completed	615 Stephen Bernas	Rem: Not Made
12/17/2013	10:15 AM	<a href="#">PERSON 506</a>	Return 1st Kit(2)	Appt. Completed	615 Roy Espinosa	Rem: Not Made
12/17/2013	10:15 AM	<a href="#">PERSON 524</a>	Return 1st Kit(2)	Appt. Completed	615 Stephen Bernas	Rem: Not Made
12/17/2013	11:00 AM	<a href="#">PERSON 399</a>	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made
12/17/2013	11:45 AM	<a href="#">PERSON 524</a>	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made

### 3.5 Viewing Appointments Using the Month Tab

Use the month tab (Exhibit 3-5) to view all of the appointments for a given month. Note that for 24-hour urine activities the month tab will be very useful since some SPs will be selected to participate in more than one collection. The names will appear in different colors indicating the appointment status. Green = scheduled, firm appointment; Black = scheduled, tentative appointment; Red = not scheduled, broken appointment; Blue = appointment completed; Brown = appointment final nonresponse. Next to each SP name is the corresponding “Phase” number to the respective appointment type. Not all SPs will have all appointment phases. For the month view, do the following steps:

1. Click on the Appointment Manager header at the top of the screen.
2. Click on the “Month” tab.
3. Due to the size of this screen, use the scroll bar all the way to the right to view the entire calendar.
4. Select the appropriate month by clicking on the month name on either side of the current month on the calendar.

**Exhibit 3-5. The Month tab in the Appointment Manager section**

**Field Follow-Up Management System - Version 10.5.0**

You signed in as Maureen McTighe [Log Out](#)

**24 HR Urine Appointment Manager**

**Filter Criteria (Optional)**

Stand:    Interviewer:    Appt. Status:

**Day Week Month New Appt. Reschedule Appt. Monitor Not Sched.**

**Select A Month to View Appts, Day to View Details**

December 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	<b>16</b> 11:45 AM <a href="#">PERSON 524</a> (1) 615 11:45 AM <a href="#">PERSON 506</a> (1) 615 12:30 PM <a href="#">PERSON 399</a> (1) 615 12:30 PM <a href="#">PERSON 524</a> (3) 615 9:30 PM <a href="#">RONAK AMIN</a> (1) 615	<b>17</b> 8:00 AM <a href="#">ARUNA GANDHI</a> (3) 615 10:15 AM <a href="#">PERSON 506</a> (2) 615 10:15 AM <a href="#">PERSON 524</a> (2) 615 11:00 AM <a href="#">PERSON 399</a> (2) 615 11:45 AM <a href="#">PERSON 524</a> (4) 615	<b>18</b> 8:45 AM <a href="#">ARUNA GANDHI</a> (4) 615 10:15 AM <a href="#">PERSON 506</a> (4) 615 2:45 PM <a href="#">KIM PIERCE</a> (4) 615	19	20	<b>21</b> 9:30 AM <a href="#">ZOYA YOUNIS</a> (1) 615 9:30 AM <a href="#">KIM PIERCE</a> (1) 615 11:00 AM <a href="#">SHANAE BROWN</a> (1) 615 11:00 AM <a href="#">ARUNA GANDHI</a> (1) 615

A full calendar (Exhibit 3-6) displays all of the appointments. They are color coded by appointment status. There is a key at the bottom of the screen on the left hand side that is not shown here. Clicking on an SP’s underlined name will display the call history. If needed, enter a call record or reschedule the appointment.

**Exhibit 3-6. Full calendar month view**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	<b>16</b> 11:45 AM PERSON 524 (1) 615 11:45 AM PERSON 506 (1) 615 12:30 PM PERSON 399 (1) 615 12:30 PM PERSON 524 (3) 615 9:30 PM RONAK AMIN 4 (1) 615 9:30 PM SHANAE BROWN 1 (3) 615	<b>17</b> 8:00 AM ARUNA GANDHI 1 (3) 615 10:15 AM PERSON 506 (2) 615 10:15 AM PERSON 524 (2) 615 11:00 AM PERSON 399 (2) 615 11:45 AM PERSON 524 (4) 615 11:45 AM PERSON 506 (3) 615 2:45 PM KIM PIERCE 1 (3) 615 8:45 PM RONAK AMIN 4 (2) 615 9:30 PM SHANAE BROWN 1 (4) 615	<b>18</b> 8:45 AM ARUNA GANDHI 1 (4) 615 10:15 AM PERSON 506 (4) 615 2:45 PM KIM PIERCE 4 (4) 615	19	20	<b>21</b> 9:30 AM ZOYA YOUNG 1 (1) 615 9:30 AM KIM PIERCE 1 (1) 615 11:00 AM SHANAE BROWN 1 (1) 615 11:00 AM ARUNA GANDHI 1 (1) 615 11:45 AM PERSON 177 (1) 615
<b>22</b> 9:30 AM ZOYA YOUNG 1 (2) 615 10:15 AM KIM PIERCE 1 (2) 615 11:00 AM SHANAE BROWN 1 (2) 615 11:45 AM ARUNA GANDHI 1 (2) 615 12:30 PM PERSON 177 (2) 615	23	24	25	26	27	28
29	30	31				

## 3.6 Viewing and Printing the Appointment Schedule

Use the Appointment Monitoring Report (Exhibit 3-7) tool to view the upcoming appointments. To view the tool, perform the following steps:

1. Click on the Appointment Manager header at the top of the screen.
2. Click on the “Appt. Monitor” tab and the screen on the next page will appear.

### Exhibit 3-7. The Appointment Monitoring Report tool

**Field Follow-Up Management System - Version 10.5.0** You signed in as Maureen McTighe [Log Out](#)

**24 UC**

[Contact Manager](#) | [Appointment Manager](#) | [Reminder Calls](#) | [Call History](#) | [Reports](#) | [Supervisor](#)

**24 HR Urine Appointment Manager**

**Filter Criteria (Optional)**

Stand:    Interviewer:    Appt. Status:

**Select A Day to View Appts**

**December 2013**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

**Tuesday, December 17, 2013** [View Daily Report](#)

8:00 AM	212708	<a href="#">ARUNA GANDHI 1</a>	60yrs	Obtain 2nd Kit(3)	Appt. Completed	615 Stephen Bernas	Rem: Not Made	
10:15 AM	873038	<a href="#">PERSON 506</a>	35yrs	Return 1st Kit(2)	Appt. Completed	615 Roy Espinosa	Rem: Not Made	
10:15 AM	902727	<a href="#">PERSON 524</a>	38yrs	Return 1st Kit(2)	Appt. Completed	615 Stephen Bernas	Rem: Not Made	
11:00 AM	706730	<a href="#">PERSON 399</a>	41yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made	
11:45 AM	873038	<a href="#">PERSON 506</a>	35yrs	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
11:45 AM	902727	<a href="#">PERSON 524</a>	38yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made	
2:45 PM	140024	<a href="#">KIM PIERCE 4</a>	45yrs	Obtain 2nd Kit(3)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
8:45 PM	205047	<a href="#">RONAK AMIN 4</a>	24yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	

Use the Appointment Monitoring Report tool to view the upcoming appointments. To view the tool, perform the following steps:

1. Click on the Appointment Manager header at the top of the screen.
2. Click on the "Appt. Monitor" tab and the screen on the next page (Exhibit 3-8) will appear.

**Exhibit 3-8. The Appointment Monitoring Report search field**

The screenshot shows a web browser window with the URL `http://nhdevweb1/fms/ApptReport.aspx`. The page title is "Field Follow-Up Management System - Version 10.5.0". The user is signed in as "Maureen McTighe" and can click "Log Out". The navigation bar includes "TB", "24 UC", and a menu with "Contact Manager", "Appointment Manager" (highlighted), "Reminder Calls", "Call History", "Reports", and "Supervisor". Below this is a green bar for the "24 HR Urine Appointment Manager". The main section is titled "Appointment Monitoring Report". It contains a "Select Search Criteria" form with three columns: "SP ID:" with a text input field, "APPOINTMENT STATUS:" with radio buttons for "Scheduled", "All Broken Appts.", "Complete Appts.", "All Final, Non-Response Appts.", and "Not Scheduled", and "STAND(S):" with a dropdown menu showing "Year 10 Stands", "Year 11 Stands", "Year 12 Stands", and "Year 13 Stands". "Search" and "Clear" buttons are at the top right of the form.

The report can be obtained by searching for a specific SP ID or by appointment status and stand.

1. Select the desired appointment status.
2. Make sure that the correct stand is highlighted.
3. Click the “Search” button and the screen (Exhibit 3-9) on the next page appears.

Exhibit 3-9. Selection of appointment status and year of stand

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB 24 UC

Contact Manager Appointment Manager Reminder Calls Call History Reports Supervisor

24 HR Urine Appointment Manager

Appointment Monitoring Report

Select Search Criteria Search Clear

SP ID:	APPOINTMENT STATUS:	STAND(S):
<input type="text"/>	<input checked="" type="radio"/> Scheduled	Year 10 Stands
	<input type="radio"/> All Broken Appts.	Year 11 Stands
	<input type="radio"/> Complete Appts.	Year 12 Stands
	<input type="radio"/> All Final, Non-Response Appts.	Year 13 Stands
	<input type="radio"/> Not Scheduled	

For each SP listed on the report, the following information will be displayed (Exhibit 3-10):

- SP ID
- SP Name
- Participant No: (Note that SPs with the same Stand ID, Segment #, and Serial # live in the same household)
  - XXX – Stand ID
  - X – Segment Number
  - XX-Serial Number
  - XX-Family Number
  - XX-Person Number



- Age
- Initial MEC Exam Date
- UMEC Appointment by Appointment Type in ascending order
- Location of appointment
- Stand ID

**Exhibit 3-10. SP information display in the Appointment Monitoring report**

**Field Follow-Up Management System - Version 10.5.0**

You signed in as Maureen McTighe [Log Out](#)

**24 UC**

[Contact Manager](#) | [Appointment Manager](#) | [Reminder Calls](#) | [Call History](#) | [Reports](#) | [Supervisor](#)

**24 HR Urine Appointment Manager**

**Appointment Monitoring Report for Stand(s): 605,607,608,609,611,612,613,614,615,261,275,278**

Select Search Criteria Search Clear

SP ID:	APPOINTMENT STATUS:	STAND(S):
<input type="text"/>	<input checked="" type="radio"/> Scheduled <input type="radio"/> All Broken Appts. <input type="radio"/> Complete Appts. <input type="radio"/> All Final, Non-Response Appts. <input type="radio"/> Not Scheduled	Year 10 Stands Year 11 Stands Year 12 Stands Year 13 Stands

SP ID	Name	Participant No.	Age	Initial Exam	Current Appt.	Location	Stand ID
140024	KIM PIERCE 4	615-1-20-37-16	45	9/22/2010	Obtain 2nd Kit(3) 12/17/2013 2:45:00 PM	UMEC	615
Appt. Status: <span>Scheduled, Firm Appt.</span> Reason: <span></span> Other Text: <span></span>							

SP ID	Name	Participant No.	Age	Initial Exam	Current Appt.	Location	Stand ID
140024	KIM PIERCE 4	615-1-20-37-16	45	9/22/2010	Return 2nd Kit(4) 12/18/2013 2:45:00 PM	UMEC	615
Appt. Status: <span>Scheduled, Firm Appt.</span> Reason: <span></span> Other Text: <span></span>							

To search by a specific SP ID, perform the following steps (Exhibit 3-11):

1. Enter the selected SP ID number.
2. Click the “Search” button.

Exhibit 3-11. Searching by SP ID number

The screenshot displays a web application interface for the 'Field Follow-Up Management System - Version 10.5.0'. The user is logged in as 'Maureen McTighe'. The interface includes a navigation bar with options like 'Contact Manager', 'Appointment Manager', 'Reminder Calls', 'Call History', 'Reports', and 'Supervisor'. The main section is titled '24 HR Urine Appointment Manager' and contains an 'Appointment Monitoring Report' form. The form has three columns: 'SP ID:', 'APPOINTMENT STATUS:', and 'STAND(S):'. The 'SP ID:' field contains the value '212708'. The 'APPOINTMENT STATUS:' column has five radio button options: 'Scheduled', 'All Broken Appts.', 'Complete Appts.', 'All Final, Non-Response Appts.', and 'Not Scheduled'. The 'STAND(S):' column has a list box with four options: 'Year 10 Stands', 'Year 11 Stands', 'Year 12 Stands', and 'Year 13 Stands'. There are 'Search' and 'Clear' buttons at the top right of the form.

Select Search Criteria			Search	Clear
SP ID:	APPOINTMENT STATUS:	STAND(S):		
212708	<input type="radio"/> Scheduled	Year 10 Stands		
	<input type="radio"/> All Broken Appts.	Year 11 Stands		
	<input type="radio"/> Complete Appts.	Year 12 Stands		
	<input type="radio"/> All Final, Non-Response Appts.	Year 13 Stands		
	<input type="radio"/> Not Scheduled			

The screen on the next page appears (Exhibit 3-12). This SP completed all four phases of the collection process. The view is ascending order as shown previously. If there are call history entries, they would also be seen on this screen. To print the report, using the **File, Print** menu option at the left-hand top of the screen on your menu bar.

**Exhibit 3-12. Screen showing SP completion of all four phases of the collection process**

The screenshot shows a web browser window with the URL `http://nhdevweb1/fms/ApptReport.aspx`. The page title is "Appointment Monitoring Report".

**Select Search Criteria**

SP ID:	APPOINTMENT STATUS:	STAND(S):
212708	<input type="radio"/> Scheduled <input type="radio"/> All Broken Appts. <input type="radio"/> Complete Appts. <input type="radio"/> All Final, Non-Response Appts. <input type="radio"/> Not Scheduled	Year 10 Stands Year 11 Stands Year 12 Stands Year 13 Stands

**Appointment Records:**

SP ID	Name	Participant No.	Age	Initial Exam	Current Appt.	Location	Stand ID
212708	ARUNA GANDHI 1	615-1-20-38-13	60	9/22/2010	Obtain 1st Kit(1) 12/21/2013 11:00:00 AM	UMEC	615
Appt. Status: <input type="text" value="Appt. Completed"/> Reason: <input type="text"/> Other Text: <input type="text"/>							
212708	ARUNA GANDHI 1	615-1-20-38-13	60	9/22/2010	Return 1st Kit(2) 12/22/2013 11:45:00 AM	UMEC	615
Appt. Status: <input type="text" value="Appt. Completed"/> Reason: <input type="text"/> Other Text: <input type="text"/>							
212708	ARUNA GANDHI 1	615-1-20-38-13	60	9/22/2010	Obtain 2nd Kit(3) 12/17/2013 8:00:00 AM	UMEC	615
Appt. Status: <input type="text" value="Appt. Completed"/> Reason: <input type="text"/> Other Text: <input type="text"/>							
212708	ARUNA GANDHI 1	615-1-20-38-13	60	9/22/2010	Return 2nd Kit(4) 12/18/2013 8:45:00 AM	UMEC	615
Appt. Status: <input type="text" value="Appt. Completed"/> Reason: <input type="text"/> Other Text: <input type="text"/>							

### 3.7 Scheduling Appointments for “Not Scheduled” SPs

While most of your SPs will be appointed by the MEC staff, some will not. This can happen for a variety of reasons such as when the SP does not know his or her availability at the time of scheduling or is undecided regarding wanting to participate and having to come back to the UMEC. Regardless of the reason, these cases will appear on the list of not-scheduled cases accessed through the **Not Sched** tab (Exhibit 3-13). For these cases, it will be the Lab Tech’s responsibility to schedule the appointment.

Exhibit 3-13. **Not Sched.** Tab in Appointment Manager section

**Field Follow-Up Management System - Version 10.5.0** You signed in as Maureen McTighe [Log Out](#)

**TB** **24 UC**

[Contact Manager](#) [Appointment Manager](#) [Reminder Calls](#) [Call History](#) [Reports](#) [Supervisor](#)

**24 HR Urine Appointment Manager**

**Filter Criteria (Optional)**

Stand:    Interviewer:    Appt. Status:

☒ Day ☐ Week ☐ Month ☐ New Appt. ☐ Reschedule ☐ Appt. Monitor ☐ Not Sched.

**Select A Day to View Appts**

**December 2013**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Wednesday, December 18, 2013** [View Daily Report](#)

8:45 AM	212708	<a href="#">ARUNA GANDHI 1</a>	60yrs	Return 2nd Kit(4)	Appt. Completed	615 Stephen Bernas	Rem:	
10:15 AM	873038	<a href="#">PERSON 506</a>	35yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	
2:45 PM	140024	<a href="#">KIM PIERCE 4</a>	45yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made	

To access the not-scheduled SPs, click on the **Not Sched.** Tab, and the list of those SPs needing appointments scheduled appears as shown on the next page (Exhibit 3-14).

Exhibit 3-14. List of SPs needing appointments

The screenshot shows a web application titled "Field Follow-Up Management System - Version 10.5.0". The user is logged in as Maureen McTighe. The interface includes a navigation bar with tabs: TB, 24 UC, Contact Manager, Appointment Manager, Reminder Calls, Call History, Reports, and Supervisor. The "Appointment Manager" section is active, showing a "24 HR Urine Appointment Manager" header. Below this, there are tabs for Day, Week, Month, New Appt., Reschedule, Appt. Monitor, and Not Sched. The "New Appt." tab is selected. A table titled "SPs Without a Scheduled Appointment" displays the following data:

Stand ID	SP ID	Phase	Exam Date	Language	Participant No.	Name	NS Reason	NS Comment
615	<a href="#">249706</a>	Obtain 1st Kit(1)	11/10/2010	English	615-12-15-1-20	PERSON 111		SP will check w/ husband
615	<a href="#">249706</a>	Return 1st Kit(2)	11/10/2010	English	615-12-15-1-20	PERSON 111		SP will check w/ husband

Click on the SP ID to bring up the contact information for the SP (Exhibit 3-15).

As you can see, you are working in the “New Appt.” tab within the “Appointment Manager” screen. In addition to the SP ID and name of the participant, you will also see a box that contains the participant phone number as well as other household members that are participating in the 24-Hour Urine Study. On this screen, you will schedule both the appointment for the SP to pick up the kit as well as for the SP to return the sample collection to the UMEC.

**Exhibit 3-15. New Appt. tab in the Appointment Manager section**

**24 HR Urine Appointment Manager**

Day Week Month **New Appt.** Reschedule Appt. Monitor Not Sched.

**Enter Search Criteria**

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Age: 35 Stand: 615 Search Clear

Phase: Obtain 1st Kit(1) Current Appointment: Initial Exam: Wednesday - 11/10/2010

Phone No: 2325651311 Phone Type: Home Comment:

**Other 24Hr Appts in Household**

Name	Age	Appt Dt/Time	Phase
PERSON 506	35	12/17/2013 11:45 AM	Obtain 2nd Kit(3)
PERSON 506	35	12/18/2013 10:15 AM	Return 2nd Kit(4)

**Select A Date To Create Appointment**

**Schedule Appointment**

Collection Started: UMEC Collection Ended: UMEC Unlink

Available Pickup Sessions							Available Return Sessions					Show All
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule		
1	12/18/2013	Wednesday	4:15 PM		1	12/19/2013	Thursday	4:15 PM	24			
2	12/18/2013	Wednesday	4:15 PM		2	12/19/2013	Thursday	4:15 PM	24			
1	12/18/2013	Wednesday	5:00 PM		1	12/19/2013	Thursday	5:00 PM	25			
2	12/18/2013	Wednesday	5:00 PM		2	12/19/2013	Thursday	5:00 PM	25			
1	12/18/2013	Wednesday	5:45 PM		1	12/19/2013	Thursday	5:45 PM	25			
2	12/18/2013	Wednesday	5:45 PM		2	12/19/2013	Thursday	5:45 PM	25			
1	12/18/2013	Wednesday	6:30 PM		1	12/19/2013	Thursday	6:30 PM	26			

To schedule the kit pickup appointment:

1. Click on a calendar date to display appointment times available on that date (Exhibit 3-16).
2. Scroll the screen to display all available appointments on the selected date.

### Exhibit 3-16. Scheduling the kit pickup appointment

http://nhdevweb1/fms/ApptCreate24Hr.aspx?appt\_id=&sp\_id= nhdevweb1

File Edit View Favorites Tools Help

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Age: 35 Stand: 515 Search Clear

Phase: Obtain 1st Kit(1) Current Appointment: Initial Exam: Wednesday - 11/10/2010

Phone No: 2325651311 Phone Type: Home Comment:

**Other 24Hr Appts in Household**

Name	Age	Appt Dt/Time	Phase
PERSON 506	35	12/17/2013 11:45 AM	Obtain 2nd Kit(3)
PERSON 506	35	12/18/2013 10:15 AM	Return 2nd Kit(4)

**Select A Date To Create Appointment**

**Schedule Appointment**

Collection Started: UMEC Collection Ended: UMEC Unlink

Available Pickup Sessions							Available Return Sessions				
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule	
1	12/19/2013	Thursday	12:30 PM	<input type="checkbox"/>	1	12/20/2013	Friday	12:30 PM	24	<input type="checkbox"/>	
2	12/19/2013	Thursday	12:30 PM	<input type="checkbox"/>	2	12/20/2013	Friday	12:30 PM	24	<input type="checkbox"/>	
1	12/19/2013	Thursday	1:15 PM	<input type="checkbox"/>	1	12/20/2013	Friday	1:15 PM	25	<input type="checkbox"/>	
2	12/19/2013	Thursday	1:15 PM	<input type="checkbox"/>	2	12/20/2013	Friday	1:15 PM	25	<input type="checkbox"/>	
1	12/19/2013	Thursday	2:00 PM	<input type="checkbox"/>	1	12/20/2013	Friday	2:00 PM	26	<input type="checkbox"/>	
2	12/19/2013	Thursday	2:00 PM	<input type="checkbox"/>	2	12/20/2013	Friday	2:00 PM	26	<input type="checkbox"/>	
1	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	1	12/20/2013	Friday	2:45 PM	26	<input type="checkbox"/>	
2	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	2	12/20/2013	Friday	2:45 PM	26	<input type="checkbox"/>	
1	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>							
2	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>							
1	12/19/2013	Thursday	4:15 PM	<input type="checkbox"/>							

December 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Click on the checkbox beside the appointment time that is convenient for the SP (Exhibit 3-17).

### Exhibit 3-17. Selecting an appointment time

**Enter Search Criteria**

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Age: 35 Stand: 615 Search Clear

Phase: Obtain 1st Kit(1) Current Appointment: Initial Exam: Wednesday - 11/10/2010

Phone No: 2325651311 Phone Type: Home Comment:

**Other 24Hr Appts in Household**

Name	Age	Appt Dt/Time	Phase
PERSON 506	35	12/17/2013 11:45 AM	Obtain 2nd Kit(3)
PERSON 506	35	12/18/2013 10:15 AM	Return 2nd Kit(4)

**Select A Date To Create Appointment**

**Schedule Appointment**

Collection Started: UMEC Collection Ended: UMEC Unlink

Available Pickup Sessions							Available Return Sessions						
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule			
1	12/18/2013	Wednesday	4:15 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	5:00 PM	24	<input type="checkbox"/>			
2	12/18/2013	Wednesday	4:15 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	5:00 PM	24	<input type="checkbox"/>			
1	12/18/2013	Wednesday	5:00 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	5:45 PM	24	<input type="checkbox"/>			
2	12/18/2013	Wednesday	5:00 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	5:45 PM	24	<input type="checkbox"/>			
1	12/18/2013	Wednesday	5:45 PM	<input checked="" type="checkbox"/>	1	12/19/2013	Thursday	6:30 PM	25	<input type="checkbox"/>			
2	12/18/2013	Wednesday	5:45 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	6:30 PM	25	<input type="checkbox"/>			
1	12/18/2013	Wednesday	6:30 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	7:15 PM	26	<input type="checkbox"/>			
2	12/18/2013	Wednesday	6:30 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	7:15 PM	26	<input type="checkbox"/>			
1	12/18/2013	Wednesday	7:15 PM	<input type="checkbox"/>									
2	12/18/2013	Wednesday	7:15 PM	<input type="checkbox"/>									

- Next, to schedule the return of the sample collection, click on the checkbox beside the appointment time that is 24 hours after start of collection for the SP to return (Exhibit 3-18). Then click on the “Schedule Appointment” button above the scheduling columns.



### Exhibit 3-18. Scheduling return of the sample

Browser: http://nhdevweb1/fms/ApptCreate24Hr.aspx?appt\_id=&sp\_id= nhdevweb1

File Edit View Favorites Tools Help

**Enter Search Criteria**

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Age: 35 Stand: 515 Search Clear

Phase: Obtain 1st Kit(1) Current Appointment: Initial Exam: Wednesday - 11/10/2010

Phone No: 2325651311 Phone Type: Home Comment:

**Other 24Hr Appts in Household**

Name	Age	Appt Dt/Time	Phase
PERSON 506	35	12/17/2013 11:45 AM	Obtain 2nd Kit(3)
PERSON 506	35	12/18/2013 10:15 AM	Return 2nd Kit(4)

**Select A Date To Create Appointment**

**Schedule Appointment**

Collection Started: UMEC Collection Ended: UMEC Unlink

Available Pickup Sessions							Available Return Sessions						
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule			
1	12/18/2013	Wednesday	4:15 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	5:00 PM	24	<input type="checkbox"/>			
2	12/18/2013	Wednesday	4:15 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	5:00 PM	24	<input type="checkbox"/>			
1	12/18/2013	Wednesday	5:00 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	5:45 PM	24	<input checked="" type="checkbox"/>			
2	12/18/2013	Wednesday	5:00 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	5:45 PM	24	<input type="checkbox"/>			
1	12/18/2013	Wednesday	5:45 PM	<input checked="" type="checkbox"/>	1	12/19/2013	Thursday	6:30 PM	25	<input type="checkbox"/>			
2	12/18/2013	Wednesday	5:45 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	6:30 PM	25	<input type="checkbox"/>			
1	12/18/2013	Wednesday	6:30 PM	<input type="checkbox"/>	1	12/19/2013	Thursday	7:15 PM	26	<input type="checkbox"/>			
2	12/18/2013	Wednesday	6:30 PM	<input type="checkbox"/>	2	12/19/2013	Thursday	7:15 PM	26	<input type="checkbox"/>			
1	12/18/2013	Wednesday	7:15 PM	<input type="checkbox"/>									
2	12/18/2013	Wednesday	7:15 PM	<input type="checkbox"/>									

December 2013 calendar view: Sun Mon Tue Wed Thu Fri Sat. The 18th is highlighted.

The appointment has been successfully scheduled (Exhibit 3-19).

**Exhibit 3-19.** Screen showing that the appointment has been rescheduled

The screenshot displays the 'Field Follow-Up Management System - Version 10.5.0' web application. The user is logged in as 'Maureen McTighe'. The main navigation bar includes 'Contact Manager', 'Appointment Manager', 'Reminder Calls', 'Call History', 'Reports', and 'Supervisor'. The '24 HR Urine Appointment Manager' section is active, showing tabs for 'Day', 'Week', 'Month', 'New Appt.', 'Reschedule', 'Appt. Monitor', and 'Not Sched.'. Below the tabs is a search form with the following fields: 'SP ID' (249706), 'Last Name' (111), 'First Name' (PERSON), 'Suffix' (empty), 'Age' (35), and 'Stand' (615). A 'Search' button and a 'Clear' button are also present. A red message below the search form states 'Appointment has been scheduled.'

### 3.8 Rescheduling Appointments for SPs Already on the Schedule

There may be times when an SP needs to reschedule his or her appointment. Use one of the two methods described below to find the SP's existing appointment and to reschedule them to a new appointment date and time.

Remember to reschedule the visit for a time that is most convenient for the SP.

### 3.8.1 OPTION #1: Use this Option if the SP's Current Appointment Date is Known

To reschedule an appointment that has been already scheduled, perform the following steps:

1. View the appointment you wish to reschedule on the Day, Week, or Month tab, or search for the SP under Call History (Exhibit 3-20).
2. Click on the underlined name of the SP.

**Exhibit 3-20. View appointment to be rescheduled**

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTigue [Log Out](#)

TB 24 UC

Contact Manager Appointment Manager Reminder Calls Call History Reports Supervisor

24 HR Urine Appointment Manager

Filter Criteria (Optional)

Stand: 617 616 615 Interviewer: Dynelle Longto GRACE HALL Kerry Horton Appt. Status: Scheduled, Firm Appt. Scheduled, Tentative Appt. Not Scheduled, Broken Appt.

Day Week Month New Appt. Reschedule Appt. Monitor Not Sched.

Select A Day to View Appts

December 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Thursday, December 19, 2013 View Daily Report

4:15 PM	978106	<u>ZOYA YOUNG 1</u>	22yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made
5:45 PM	249706	<u>PERSON 111</u>	35yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Stephen Bernas	Rem: Not Made

The next screen displays the “Call History” screen for this SP (Exhibit 3-21) and other information that is pertinent to the SP. To reschedule the appointment after speaking with the SP, perform the following steps:

1. Click “yes” to contact made with SP.
2. Click “yes” to reschedule appointment.

Exhibit 3-21. “Call history” screen for SP

The screenshot shows a web application interface for '24 HR Urine Call History'. At the top, there is a navigation bar with tabs: Contact Manager, Appointment Manager, Reminder Calls, Call History (selected), Reports, and Supervisor. Below the navigation bar is a pink header with the text '24 HR Urine Call History'. The main content area has a blue header 'Enter Search Criteria' with input fields for SP ID (249706), Last Name (111), First Name (PERSON), Suffix, Phone (232-565-1311), and Stand (615). There are 'Search' and 'Clear' buttons. Below the search criteria, there is a box containing patient information: Appt Type: Return 1st Kit(2), Current Appointment: Thursday - 12/19/2013 5:45 PM, Initial Exam: Wednesday - 11/10/2010, Current Appt Status: Scheduled, Firm Appt., Updated on 12/19/2013, Age: 35, Gender: Male, Language: English, Interpreter Required: No, Send Materials in: ENGLISH, Phone No: 232-565-1311, Location: Home, Comment, and SP Will Call In. Below this is a table with columns: Module, Status, and Appt Dt/Time. The table has one row: 24 Hr Urine-Obtain 1st Kit(1), S, 12/18/2013 5:45 PM. Below the table is a blue header 'Record Call History for PERSON 111' with an 'Update Call Info' button. Below this is a form with fields for Appointment Date/Time (12/19/2013 5:45 PM), Contact Made with SP (radio buttons Yes/No), Reschedule Appointment (radio buttons Yes/No), Contact Status (dropdown menu), and Comment (text area).

To reschedule the kit pickup appointment (Exhibit 3-22):

1. Click on a calendar date to display appointment times available on that date.
2. Scroll the screen to display all available appointments on the selected date.

Exhibit 3-22. Display of available appointment times

**24 HR Urine Appointment Manager**

Day Week Month New Appt. **Reschedule** Appt. Monitor Not Sched.

**Enter Search Criteria**

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Age: 35 Stand: 515 Search Clear

Phase: Return 1st Kit(2) Current Appointment: Thursday - 12/19/2013 5:45 PM Initial Exam: Wednesday - 11/10/2010

Phone No: 2325651311 Phone Type: Home Comment:

**Other Appts**

Module	Status	Appt Dt/Time
24 Hr Urine-Obtain 1st Kit(1)	S	12/18/2013 5:45 PM

**Other 24Hr Appts in Household**

Name	Age	Appt Dt/Time	Phase
PERSON 506	35	12/17/2013 11:45 AM	Obtain 2nd Kit(3)
PERSON 506	35	12/18/2013 10:15 AM	Return 2nd Kit(4)

**Select A Date To Reschedule Appointment**

**Reschedule Appointment**

Collection Started: UMEC Collection Ended: UMEC Unlink

Available Pickup Sessions							Available Return Sessions				
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule	
1	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	1	12/20/2013	Friday	2:00 PM	24	<input type="checkbox"/>	
2	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	2	12/20/2013	Friday	2:00 PM	24	<input type="checkbox"/>	
1	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>	1	12/20/2013	Friday	2:45 PM	24	<input type="checkbox"/>	
2	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>	2	12/20/2013	Friday	2:45 PM	24	<input type="checkbox"/>	
1	12/19/2013	Thursday	4:15 PM	<input type="checkbox"/>	1	12/20/2013	Friday	3:30 PM	25	<input type="checkbox"/>	
1	12/19/2013	Thursday	5:00 PM	<input type="checkbox"/>	2	12/20/2013	Friday	3:30 PM	25	<input type="checkbox"/>	
2	12/19/2013	Thursday	5:00 PM	<input type="checkbox"/>	1	12/20/2013	Friday	4:15 PM	26	<input type="checkbox"/>	

Next, to schedule the return of the sample collection (Exhibit 3-23), click on the checkbox besides the appointment time that is 24 hours after the start of collection for the SP to return. Then click on the “Schedule Appointment” button above the scheduling columns.

Exhibit 3-23. Select appointment time

http://nhdevweb1/ffms/ApptResched24Hr.aspx?sp\_id=249706&app... WesInfo Home Pa... nhdevweb1 x WesInfo Home Pa... File Edit View Favorites Tools Help

PERSON SUB 35 12/18/2013 10:15 AM Return Znd Kit(4)

**Select A Date To Reschedule Appointment**

**Reschedule Appointment**

Collection Started: UMEC Collection Ended: UMEC ☐ Unlink

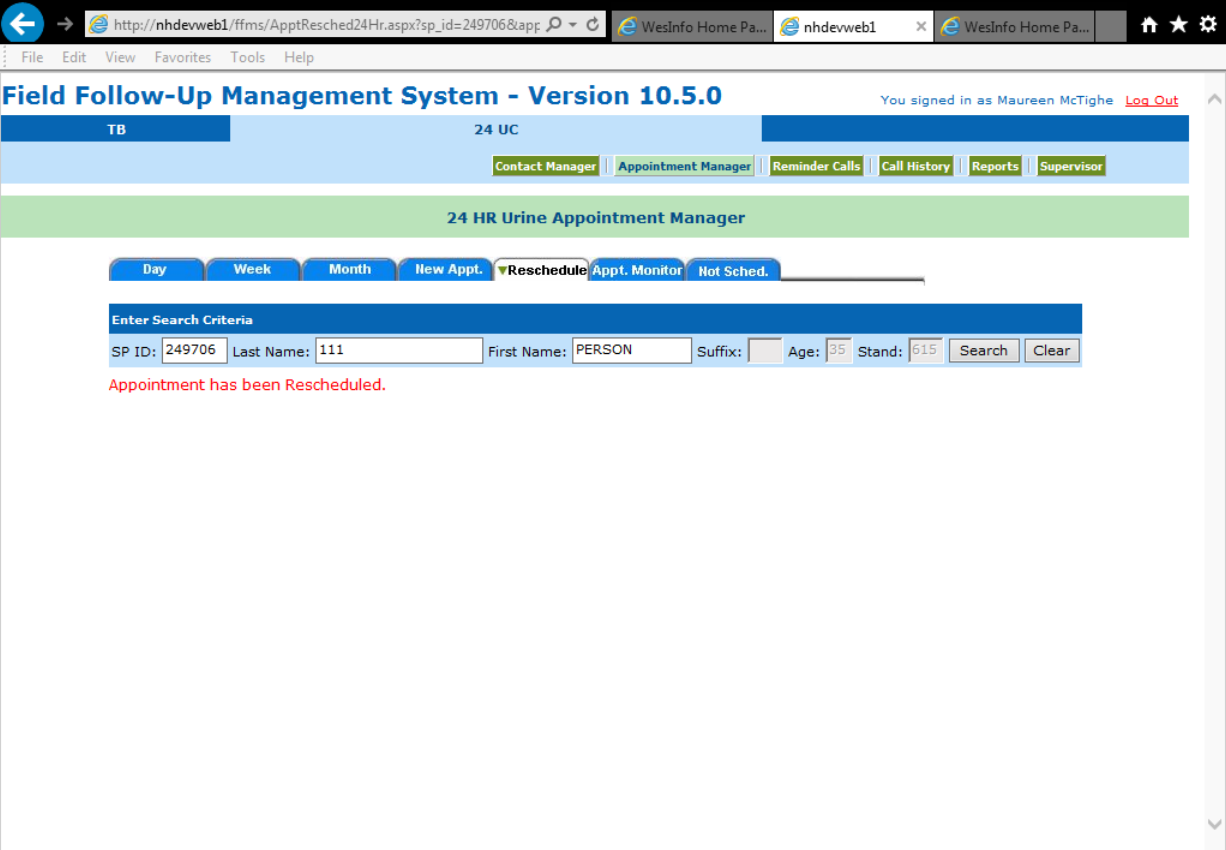
Available Pickup Sessions							Available Return Sessions <input type="checkbox"/> Show All				
Slot	Date	Day of Week	Time	Schedule	Slot	Date	Day of Week	SP Time	Hours	Schedule	
1	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	1	12/20/2013	Friday	7:15 PM	24	<input type="checkbox"/>	
2	12/19/2013	Thursday	2:45 PM	<input type="checkbox"/>	2	12/20/2013	Friday	7:15 PM	24	<input checked="" type="checkbox"/>	
1	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>	1	12/20/2013	Friday	8:00 PM	25	<input type="checkbox"/>	
2	12/19/2013	Thursday	3:30 PM	<input type="checkbox"/>	2	12/20/2013	Friday	8:00 PM	25	<input type="checkbox"/>	
1	12/19/2013	Thursday	4:15 PM	<input type="checkbox"/>	1	12/20/2013	Friday	8:45 PM	25	<input type="checkbox"/>	
1	12/19/2013	Thursday	5:00 PM	<input type="checkbox"/>	2	12/20/2013	Friday	8:45 PM	25	<input type="checkbox"/>	
2	12/19/2013	Thursday	5:00 PM	<input type="checkbox"/>	1	12/20/2013	Friday	9:30 PM	26	<input type="checkbox"/>	
2	12/19/2013	Thursday	5:45 PM	<input type="checkbox"/>	2	12/20/2013	Friday	9:30 PM	26	<input type="checkbox"/>	
1	12/19/2013	Thursday	6:30 PM	<input type="checkbox"/>							
2	12/19/2013	Thursday	6:30 PM	<input type="checkbox"/>							
1	12/19/2013	Thursday	7:15 PM	<input checked="" type="checkbox"/>							
2	12/19/2013	Thursday	7:15 PM	<input type="checkbox"/>							
1	12/19/2013	Thursday	8:00 PM	<input type="checkbox"/>							
2	12/19/2013	Thursday	8:00 PM	<input type="checkbox"/>							
1	12/19/2013	Thursday	8:45 PM	<input type="checkbox"/>							
2	12/19/2013	Thursday	8:45 PM	<input type="checkbox"/>							
1	12/19/2013	Thursday	9:30 PM	<input type="checkbox"/>							

December 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

The appointment has been successfully rescheduled (Exhibit 3-24).

Exhibit 3-24. Screen indicating that appointment has been re-scheduled



The screenshot shows a web browser window with the URL [http://nhdevweb1/ffms/ApptResched24Hr.aspx?sp\\_id=249706&appf](http://nhdevweb1/ffms/ApptResched24Hr.aspx?sp_id=249706&appf). The browser tabs include 'WesInfo Home Pa...' and 'nhdevweb1'. The application header is 'Field Follow-Up Management System - Version 10.5.0' with a user login 'You signed in as Maureen McTighe' and a 'Log Out' link. The main navigation bar includes 'TB', '24 UC', and a menu with 'Contact Manager', 'Appointment Manager', 'Reminder Calls', 'Call History', 'Reports', and 'Supervisor'. Below this is a green bar for the '24 HR Urine Appointment Manager'. A sub-menu shows 'Day', 'Week', 'Month', 'New Appt.', 'Reschedule' (selected), 'Appt. Monitor', and 'Not Sched.'. A search section titled 'Enter Search Criteria' contains fields for 'SP ID: 249706', 'Last Name: 111', 'First Name: PERSON', 'Suffix:', 'Age: 35', and 'Stand: 615', with 'Search' and 'Clear' buttons. A red message at the bottom states 'Appointment has been Rescheduled.'

### 3.8.2 OPTION #2: Use this Option if the SP's Current Appointment Date is Not Known

1. Click on the Call History header at the top right of the screen (Exhibit 3-25).
2. Enter the SP ID, last name, first name, or any combination of the three for the SP and click on Search.

**Exhibit 3-25. Call history header at top right of screen**

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB 24 UC

Contact Manager Appointment Manager Reminder Calls **Call History** Reports Supervisor

24 HR Urine Call History

Enter Search Criteria

SP ID: Last Name: First Name: Suffix: Phone: Stand: Search Clear

1. The FFMS will display all SPs who match the search criteria (Exhibit 3-26).
2. To view the call history, click the select button next to the appropriate SP.
3. Follow steps under option #1 to reschedule the appointment.



Exhibit 3-26. Display of SPs

http://nhdevweb1/ffms/SelectSp.aspx?sp\_id=0&fname=&lname=S WesInfo Home Pa... nhdevweb1 WesInfo Home Pa... File Edit View Favorites Tools Help

## Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB 24 UC

[Contact Manager](#) [Appointment Manager](#) [Reminder Calls](#) [Call History](#) [Reports](#) [Supervisor](#)

### Call History

Select SP

	SP ID	Last Name	First Name	Gender	Age	Stand
Select	947094	SMITH	40F	Female	40	615
Select	267956	SMITH	49M	Male	49	615
Select	813445	SMITH	A18	Female	18	616
Select	329531	SMITH	A45	Female	45	616
Select	398656	SMITH	AALIYAH	Female	65	195
Select	999763	SMITH	AARON	Male	40	234
Select	319787	SMITH	ABBY	Female	44	188
Select	947787	SMITH	ABBY	Female	31	241
Select	926698	SMITH	ABIGAIL	Female	44	206
Select	650795	SMITH	ABIGAIL	Female	83	224
Select	229127	SMITH	ABIGAIL	Female	30	245
Select	105571	SMITH	ADAM II	Male	36	222
Select	801465	SMITH	ADAM	Male	18	224

## 3.9 Call History

Use the Call History to record the results of all contact attempts and to reschedule appointments. There are two ways to view and make entries on the call history.

### 3.9.1 OPTION #1: Rescheduling through Appointment Manager

The first and easiest way is to click on the underlined name of the SP while viewing appointments in the day, week, or month view. This option works only if the appointment has been scheduled.

1. View the appointment you wish to reschedule on the Day, Week, or Month tab, or search for the SP under Call History (Exhibit 3-27).
2. Click on the underlined name of the SP.

**Exhibit 3-27. Locate appointment to be rescheduled**

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

24 UC

[Contact Manager](#) | [Appointment Manager](#) | [Reminder Calls](#) | [Call History](#) | [Reports](#) | [Supervisor](#)

24 HR Urine Appointment Manager

Filter Criteria (Optional)

Stand: 617 616 615 Interviewer: Dynelle Longto GRACE HALL Kerry Horton Appt. Status: Scheduled, Firm Appt. Scheduled, Tentative Appt. Not Scheduled, Broken Appt.

Day Week Month New Appt. Reschedule Appt. Monitor Not Sched.

Select A Day to View Appts

December 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Friday, December 20, 2013 [View Daily Report](#)

Time	ID	Name	Age	Reason	Status	Interviewer	Rem
4:15 PM	354189	<u>PERSON 177</u>	20yrs	Return 2nd Kit(4)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem: Not Made
7:15 PM	249706	<u>PERSON 111</u>	35yrs	Return 1st Kit(2)	Scheduled, Firm Appt.	615 Roy Espinosa	Rem:

1. Scroll down to view the call history entries that have been made for the SP (Exhibit 3-28).
2. Answer the two **Yes** or **No** questions appropriately. If the answer to the second question is “Yes” the system automatically proceeds to reschedule the appointment.

**Exhibit 3-28. Call history/contact status for SP**

**24 HR Urine Call History**

Enter Search Criteria

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Phone: 232-565-1311 Stand: 615 Search Clear

Appt Type: Return 1st Kit(2) Current Appointment: Friday - 12/20/2013 7:15 PM Initial Exam: Wednesday - 11/10/2010

Current Appt Status: Scheduled, Firm Appt., Updated on 12/19/2013

Age: 35 Gender: Male Language: English Interpreter Required: No Send Materials in: ENGLISH

Phone No: 232-565-1311 Location: Home Comment: SP Will Call In:

Module	Status	Appt Dt/Time
24 Hr Urine-Obtain 1st Kit(1)	S	12/19/2013 7:15 PM

Phase	Date/Time	Contact Made	Contact Status	Comment	Rescheduled
1	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes
2	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes

**Record Call History for PERSON 111** Update Call Info

Appointment Date/Time: 12/20/2013 7:15 PM

Contact Made with SP: ☐ Yes ☐ No

Reschedule Appointment: ☐ Yes ☐ No

Contact Status:

Comment:

If the answer to the second question is “No,” select a result code from the drop-down menu (Exhibit 3-29). Click on the down arrow and select the appropriate code.

### Exhibit 3-29. Selecting a result code

Enter Search Criteria

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Phone: 232-565-1311 Stand: 615 Search Clear

Appt Type: Return 1st Kit(2) Current Appointment: Friday - 12/20/2013 7:15 PM Initial Exam: Wednesday - 11/10/2010  
Current Appt Status: Scheduled, Firm Appt., Updated on 12/19/2013  
Age: 35 Gender: Male Language: English Interpreter Required: No Send Materials in: ENGLISH  
Phone No: 232-565-1311 Location: Home Comment: SP Will Call In:

Module	Status	Appt Dt/Time
24 Hr Urine-Obtain 1st Kit(1)	S	12/19/2013 7:15 PM

Phase	Date/Time	Contact Made	Contact Status	Comment	Rescheduled
1	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes
2	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes

Record Call History for PERSON 111 Update Call Info

Appointment Date/Time: 12/20/2013 7:15 PM

Contact Made with SP: ☒ Yes ☐ No

Reschedule Appointment ☐ Yes ☒ No

Contact Status:

Comment:

1. If a result code of “other” was selected, type a reason into the text field provided (Exhibit 3-30)
2. Click on the pink “Update call info” button.

Exhibit 3-30. Update call info button

**24 HR Urine Call History**

Enter Search Criteria

SP ID: 249706 Last Name: 111 First Name: PERSON Suffix: Phone: 232-565-1311 Stand: 615 Search Clear

Appt Type: [Return 1st Kit\(2\)](#) Current Appointment: [Friday - 12/20/2013 7:15 PM](#) Initial Exam: [Wednesday - 11/10/2010](#)

Current Appt Status: [Scheduled, Firm Appt., Updated on 12/19/2013](#)

Age: 35 Gender: [Male](#) Language: [English](#) Interpreter Required: [No](#) Send Materials in: [ENGLISH](#)

Phone No: [232-565-1311](#) Location: [Home](#) Comment: SP Will Call In:

Module	Status	Appt Dt/Time
24 Hr Urine-Obtain 1st Kit(1)	<a href="#">S</a>	12/19/2013 7:15 PM

Phase	Date/Time	Contact Made	Contact Status	Comment	Rescheduled
1	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes
2	12/19/2013 2:27 PM	Yes	Callback - appt. made		Yes

**Record Call History for PERSON 111** [Update Call Info](#)

Appointment Date/Time: 12/20/2013 7:15 PM

Contact Made with SP: ☒ Yes ☐ No

Reschedule Appointment: ☐ Yes ☒ No

Contact Status: [Callback - appt. made](#)

Comment:

The Call History (Exhibit 3-31) been successfully updated.

Exhibit 3-31. Screen indicating that call history has been successfully updated

The screenshot shows a web browser window with the URL [http://nhdevweb1/ffms/CallInfo.aspx?appt\\_id=8601140&sp\\_id=249](http://nhdevweb1/ffms/CallInfo.aspx?appt_id=8601140&sp_id=249). The browser's address bar shows "nhdevweb1". The page title is "Field Follow-Up Management System - Version 10.5.0". The user is signed in as "Maureen McTighe" and can click "Log Out". The page has a navigation bar with "TB" and "24 UC" tabs. Below the tabs are buttons for "Contact Manager", "Appointment Manager", "Reminder Calls", "Call History" (highlighted), "Reports", and "Supervisor". A pink banner reads "24 HR Urine Call History". Below this is a search section titled "Enter Search Criteria" with input fields for "SP ID:", "Last Name:", "First Name:", "Suffix:", "Phone:", and "Stand:". There are "Search" and "Clear" buttons. A red message states "Call History has been Updated.".

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB 24 UC

Contact Manager Appointment Manager Reminder Calls **Call History** Reports Supervisor

24 HR Urine Call History

Enter Search Criteria

SP ID: Last Name: First Name: Suffix: Phone: Stand: Search Clear

Call History has been Updated.

### 3.9.2. OPTION #2: Rescheduling through Call History

The second way to view and make entries on the call history is through the call history button at the top right of the screen. Use this to search for a case using the SP ID, first name, or last name of any SP in the household.

1. Click on the Call History header at the top right of the screen (Exhibit 3-32).
2. Enter the SP ID, last name, first name, or any combination of the three for the SP and click on Search.

**Exhibit 3-32. Click on the Call History header**

Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB 24 UC

Contact Manager Appointment Manager Reminder Calls **Call History** Reports Supervisor

24 HR Urine Call History

Enter Search Criteria

SP ID: Last Name: First Name: Suffix: Phone: Stand: Search Clear

1. The FFMS will display all SPs who match the search criteria (Exhibit 3-33)
2. To view the call history, click the select button next to the appropriate SP. Be very careful to pick the correct SP.
3. Follow the steps under option #1 to update the call history.

**Exhibit 3-33. Display of SPs matching search criteria**

The screenshot shows a web application interface for 'Field Follow-Up Management System - Version 10.5.0'. The user is logged in as 'Maureen McTighe'. The 'Call History' tab is selected, displaying a table of SPs. The table has columns for 'SP ID', 'Last Name', 'First Name', 'Gender', 'Age', and 'Stand'. Each row has a 'Select' button to its left.

	SP ID	Last Name	First Name	Gender	Age	Stand
Select	100897	1	PERSON	Female	37	615
Select	119162	10	PERSON	Female	65	615
Select	235514	100	PERSON	Male	23	615
Select	236351	101	PERSON	Female	38	615
Select	238858	102	PERSON	Female	61	615
Select	239175	103	PERSON	Female	41	615
Select	239375	104	PERSON	Female	61	615
Select	240743	105	PERSON	Male	65	615
Select	242511	106	PERSON	Female	48	615
Select	243558	107	PERSON	Female	20	615
Select	245233	108	PERSON	Female	69	615
Select	245338	109	PERSON	Female	52	615
Select	121148	11	PERSON	Male	38	615

### 3.10 Contact Manager – Viewing Addresses and Phone Numbers

Use the contact manager to view the current phone number, street address and mailing address for any SPs. Search by SP ID, last name, first name or phone number or a combination of any of the four.

1. Click on the Contact Manager header (Exhibit 3-34).
2. Enter the desired search criteria by typing in one or more of the boxes.
3. Click the “Search” button.



Exhibit 3-34. Contact manager—searching for SP addresses and phone numbers

The screenshot displays a web browser window with the URL `http://nhdevweb1/ffms/phoneaddress.aspx`. The browser's address bar shows `nhdevweb1`. The page title is "Field Follow-Up Management System - Version 10.5.0". In the top right corner, it indicates "You signed in as Maureen McTighe" with a [Log Out](#) link. The main navigation bar includes a "TB" tab, a "24 UC" indicator, and a series of buttons: "Contact Manager" (highlighted in yellow), "Appointment Manager", "Reminder Calls", "Call History", "Reports", and "Supervisor". Below this, a yellow banner reads "Contact Manager". The search section, titled "Enter Search Criteria", contains input fields for "SP ID:", "Last Name:", "First Name:", "Suffix:", "Age:", "Phone:", and "Stand:". To the right of these fields are "Search" and "Clear" buttons. The page has a standard browser menu (File, Edit, View, Favorites, Tools, Help) and a scroll bar on the right.

To view the contact information, select the appropriate SP (Exhibit 3-35).

**Exhibit 3-35. Select SP for contact information**

**Select SP**

	SP ID	Last Name	First Name	Gender	Age	Stand
Select	152445	JONES	A18	Female	18	616
Select	258734	JONES	A20	Female	20	616
Select	737018	JONES	AALIYAH	Female	53	226
Select	320306	JONES	AARON	Male	48	204
Select	751032	JONES	AARON	Male	80	208
Select	226102	JONES	ABBY	Female	63	191
Select	543914	JONES	ABBY	Female	80	236
Select	842929	JONES	ABBY	Female	31	242
Select	570627	JONES	ABBY	Female	60	615
Select	319242	JONES	ABIGAIL	Female	0	227
Select	720725	JONES	ABIGAIL	Female	56	228
Select	918684	JONES	ABIGAIL	Female	22	236
Select	881908	JONES	ADAM	Male	46	232

1. SP phone and address information displays. (Exhibit 3-36).
2. Note that the FFMS cannot be used to update phone and address information. Contact the field office if updates are needed.

Exhibit 3-36. Display of SP phone number and address

The screenshot shows a web browser window with the URL `http://nhdevweb1/ffms/phoneaddress.aspx?sp_id=570627&stand=1`. The page title is "Contact Manager". Below the title is a search bar with the following fields: SP ID: 570627, Last Name: JONES, First Name: ABBY, Suffix: (empty), Age: 60, Phone: (empty), Stand: 615. There are "Search" and "Clear" buttons. Below the search bar is a red message: "Stand is still active, contact your Field Office for Address and Phone updates. : 800-298-1394".

Below the message is a section titled "Exam Information" with the following details: Exam Date: 11/16/2010 8:30 AM, Spanish Exam: No.

Below the exam information is a section titled "Phone Information for ABBY JONES" with a table showing phone numbers and types.

Phone Number	Ext.	Phone Type
2523423423		Home
4634564564		Home
7897897697		Home

Below the phone information is a section titled "Address Information for ABBY JONES" with a table showing address details.

Address Type	Street Address	City	State	Zip
Mailing	12802 Park Pky	Sacramento	CA	94203
Street	12802 Park Pky	Sacramento	CA	94203

Below the address information are four expandable sections:

- ☒ Other Contact Information (Show Details...)
- ☒ Other HH Members (Show Details...)
- ☒ Vital Statistics (Show Details...)
- ☒ Text Message Opt-Out/Opt-In (Show Details...)

## 3.11 Making Reminder Calls

Use the Reminder Calls window (Exhibit 3-37) when making reminder telephone calls to display the list of SPs with scheduled appointments who have not yet confirmed their appointment. The report allows the Lab Tech to view all currently scheduled appointments that have not received a successfully completed reminder call. The report provides the ability to filter the list for appointments for today, the next day, next 2 days and the next 3 days. Normally, the "Today" filter will not display any SPs since all reminder calls should be attempted and completed the day before the SP's scheduled appointment. This report should be printed out first thing each morning.

The report lists the following information for each SP: SP ID, Stand ID, SP Name, Age, Language, Interpreter Required, Phone Number, Appointment Type, Appointment Date, Appointment Status, Collection Location and Appointment Notes. Use the reminder call script when making these calls.

Exhibit 3-37. Reminder calls window

[←](#)
[→](#)
<http://nhdevweb1/ffms/remcalls.aspx>
nhdevweb1

File Edit View Favorites Tools Help

# Field Follow-Up Management System - Version 10.5.0

You signed in as Maureen McTighe [Log Out](#)

TB

24 UC

[Contact Manager](#)
[Appointment Manager](#)
[Reminder Calls](#)
[Call History](#)
[Reports](#)
[Supervisor](#)

24 HR Urine Reminder Calls

Filter SPs

Appointment
☐ Today
☒ Next Day
☐ Next 2 Days
☐ Next 3 Days

SP ID	Stand	SP Name	Age	Language	Interp Regd	Phone Number	Appt. Type	Appt. Date	Appt. Status	Collection Location	Appt Notes
978106	615	ZOYA YOUNS 1	22		No	213-565-4213	Obtain 1st Kit(1)	12/21/2013 12:30 PM	Scheduled, Firm Appt.	UMEC	
685475	615	SHANAE BROWN 1	49		Yes	213-565-4213	Obtain 2nd Kit (3)	12/20/2013 11:00 AM	Scheduled, Firm Appt.	UMEC	
354189	615	PERSON 177	20		No	301-256-9584	Obtain 1st Kit(1)	12/21/2013 11:45 AM	Scheduled, Firm Appt.	UMEC	

### 3.12 Reminder Call Scripts

Use this script when calling SPs to remind them of their future 24-Hour Urine appointment to obtain 1st kit (phase 1) or obtain 2nd kit (phase 3) and starting at the UMEC.

Hello, my name is (LAB TECH NAME). I am calling to speak with (SP NAME) to confirm an appointment. Are you (SP NAME)?

[If yes] Do you have a few moments to speak with me?

[If no] May I speak to (SP NAME)?

[If the SP is not home, find out a good time to call back to confirm appointment.]

#### Confirming the Appointment

I am calling from the National Health Study to remind you of your appointment at our urine study mobile exam center to begin the 24-hour urine study. Your appointment is scheduled for \_\_\_\_\_ (DAY, DATE) at (TIME).

During this appointment, we will ask you to urinate (pee) at our center to start the study, so do not urinate (pee) right before you come to our mobile exam center.

Do you have any questions?

#### Possible questions:

How much will I be compensated? \$X amount for transportation for this appointment and then \$100 when you return. (See “SP Transportation Incentives” for the amount.)

How much time will it take? Approximately 30 minutes.

Can I reschedule my appointment? (See below – Rescheduling the Appointment)

### **Rescheduling the Appointment**

I can reschedule the appointment for you. The next available time I have open is (\_\_\_\_\_). Is that convenient for you?

[If yes, reschedule. If not, try another time. Thank the SP for their time and say goodbye.]

### **Reminder to Start Collection Call for Returning Kit if SP Started at Home**

Hello, my name is (LAB TECH NAME). I am calling to speak with (SP NAME). Are you (SP NAME)?

If yes] Do you have a few moments to speak with me?

[If no] May I speak to (SP NAME)?

[If the SP is not home, find out a good time to call back to confirm appointment.]

I am calling from the National Health Study to remind you to begin the 24-hour urine study. You are scheduled to start collecting your urine tomorrow, (DAY) first thing when you get up in the morning and stop after urinating when you first wake up the day after which is \_\_\_\_\_(DAY).

Please review the instructions we gave you at the urine study mobile exam center before you start. Also, be sure to put the ice packs in the freezer tonight, if you haven't already, so they will be ready for you to use tomorrow.

Do you have any questions?

Your appointment to return your sample is scheduled for \_\_\_\_\_ (DAY, DATE) at (TIME). You will be compensated for your time and travel for this visit. Do you have any other questions?

Thank you.

If you have any questions about the instructions, or are unable to start the urine collection tomorrow, please call the helpline as soon as possible at 855-XXX-XXXX.

## Missed Appointment Guidelines

All call attempts should be logged into the Call History in the FFMS.

- For missed appointments, call SP after being 15 minutes late for the appointment. (Call #1, NO Message)
- If no contact is made, another call can be placed 15 minutes later and a message left reminding the SP of the appointment and asking for a return call to reschedule. (Call #2, Message #1)
- One contact attempt should be made the following day with a message left.
  - Review the FFMS and the field office call log to determine if a successful reminder call was made in the past. If so, make this call at this time.
  - If there wasn't a successful call in the past—avoid the times of day and/or telephone number that wasn't successful.
  - If no successful calls were ever made and there's no other guidance, then this call should be made during the evening.
  - (Call #3, Message #2).
- If SP has not called back, work with Maureen McTighe to determine the next steps. Contact the Field Office to see if there are additional phone numbers or notes in the household folder that would be helpful. Maureen will check the MEC appointment status for other household members.
- Maureen will continue to monitor the status of MEC appointments for all household members. Once all SPs in the household have either been MEC examined or have been finalized as a refusal by the field office, Maureen will have the techs attempt to contact the SP regarding the 24-Hour Urine collection again. Ideally, the techs will make two more attempts at different times of day and different days of the week, in an attempt to reschedule the SP. (Call #4, NO Message)
- If Call #4 was not successful, proceed with a final call. (Call #5, Message 3)
- After five calls no more attempts are necessary. However, if there is something noted in reviewing the participant's and their family's appointments that would suggest a subsequent call would be successful, then another attempt is OK.
- At the end of stand, Maureen will close all nonresponding SPs as FNR-Refusal. Ideally, by the time this occurs we have made three to five contacts with the SP to reschedule their 24-Hour Urine collection appointment.

## 24-Hour Urine Collection Kit

### 4.1 Items in the 24-Hour Collection Kit

These kits are to be handed out to SPs who are picking up their kit during phase 1 and phase 3.

- Large cooler bag – red or blue
- Small black cooler bag
- 6 ice packs
  - 3 frozen
  - 3 non-frozen
- 3-3L orange collection containers with start and end date stickers attached
- For females only
  - Urine hat
  - Ziploc bag to store urine hat
  - 10 individually wrapped Sani-Cloths
- For males only
  - Place a cardboard insert in the black travel bag – this is used to keep the 24-hour urine jug in an upright position.
- 3 large Ziploc bags if SP wants to store 24-hour urine jugs in the refrigerator
- Written instructions

These kits can be made up in advance and placed on the shelf in the storage closet. In the large red or blue cooler bag place 2 3L orange collection containers and 3 non-frozen ice packs inside the cooler bag. In the pocket of the large red or blue cooler bag, place 3 large Ziploc bags.



In the black travel cooler bag, place one orange 3L collection container. For females place a urine hat in the inside of the black cooler bag. Place 10 individually wrapped Sani-Cloths in a small Ziploc bag and store in the pocket of the travel bag. If the kit is for males, place one orange 3L collection container and a cardboard insert in the bag.

The instruction sheet and the 3 frozen ice packs will be added during the SP's appointment.

#### **4.1.1 Supplies Used While SP is at Home**

These supplies are to be used while the SP is at home. Place this collection kit next to the toilet for a reminder to collect your urine every time the SP urinates.

- Large cooler bag
- 3 frozen ice packs
- 3L orange collection containers
- Females:
  - Urine hat
  - Ziploc bag to store urine hat
  - 10 individually wrapped Sani-Cloths
- Written instructions

#### **4.1.2 Supplies Used While SP is Away from Home**

These supplies are to be used when the SP will be away from the home for any time during the 24-hour time period the SP is collecting his or her urine. SPs are instructed to take these supplies with them any time they leave their home.

- Small black cooler bag
- 3 frozen ice packs
- Empty 3L orange collection container

- For females
  - Urine hat
  - Ziploc bag to store urine hat
  - 10 individually wrapped Sani-Cloths
- For males
  - Take the cardboard insert, so the jug stays upright in the travel bag.
- Written instructions

## **4.2 SP Instruction Handouts**

### **4.2.1 Starting and Ending Collection in UMEC**

- Handout is located at the back of this document (Appendix A).
- Used for SPs who will start their collection in the UMEC and end their collection in the UMEC.
- This will be used for the vast majority of SPs.

### **4.2.2 Starting and Ending Collection at Home**

- Handout is located at the back of this document (Appendix B).
- Used for SPs who are unable to come to the UMEC to start and end their collection.

### **4.2.3 Preparing SP Instruction Handouts**

Place the appropriate phone number stickers on the front and back pages of each handout. Each MEC will have the same phone number for the entire year of the 24-hour urine study.

List of phone number for each MEC:

MEC 1	1-855-668-7252	240-224-8241
MEC 2	1-855-668-8931	240-224-8242
MEC 3	1-855-668-8937	240-224-8243

#### 4.2.4 Types of Handouts

All instruction sheet handouts have been translated into Spanish, Traditional Chinese, Simplified Chinese, Vietnamese and Korean. The translated instruction sheets should be given to the SPs who need interpreters during their exam.

- Starting and Ending at the UMEC

- English
- Spanish
- Chinese, traditional
- Chinese, simplified
- Vietnamese
- Korean

- Starting and Ending at Home

- English
- Spanish
- Chinese, traditional
- Chinese, simplified
- Vietnamese
- Korean

### 4.2.5 Using the Handouts

Instruct the SP on using these handouts, by following the document word for word and in order as listed. This will ensure the SP understands the procedure on how to collect his or her 24-hour urine sample appropriately and minimize confusion.

Remember to write the SP's return appointment (date and time) on the handout, both the front and back pages. The 24-hour urine compliance application will prompt you to verify the SP's return appointment. Next the application will prompt you to begin instructing the SP.

### 4.2.6 Starting Collection at UMEC and Ending at Home

This situation will occur when the SP is unable to make his or her return appointment within 26 hours. Instruct the SP on how to end the collection at home using the Home Instructions. If the SP calls in to inform us that he or she is unable to make the return appointment, instruct him or her over the phone.

### 4.2.7 24-Hour Urine Talking Points

Use the following talking points when instructing the SPs:

- If you stop somewhere before you get home today, remember to collect that urine.
- You do not need to fill the containers. Only fill with what you normally urinate (pee).
- It is important not to modify your diet or fluid intake while collecting your 24-hour urine sample.

#### ***Females***

- Be sure the urine hat is positioned correctly before you start to urinate so that you collect all of the urine.

### 4.2.8 Other SP Instructions

- For females, instruct the SP on how to clean the urine hat.
  - Store the hat in a Ziploc bag.
  - Wipe with a Sani-Cloth and air dry after each use.
  - Do not rinse with tap water.
  - Place back in the Ziploc bag.

## ISIS Application for 24-Hour Urine Study

### 5.1 Picking Up First 24-Hour Urine Collection Kit (Phase 1)

This is the SP's first appointment at the Urine MEC (UMEC). The SP will be instructed how to collect his or her urine for a 24-hour period, sent home with all the supplies, and paid transportation at this appointment (unless the SP has walked over from the MEC or taken a taxi to the UMEC).

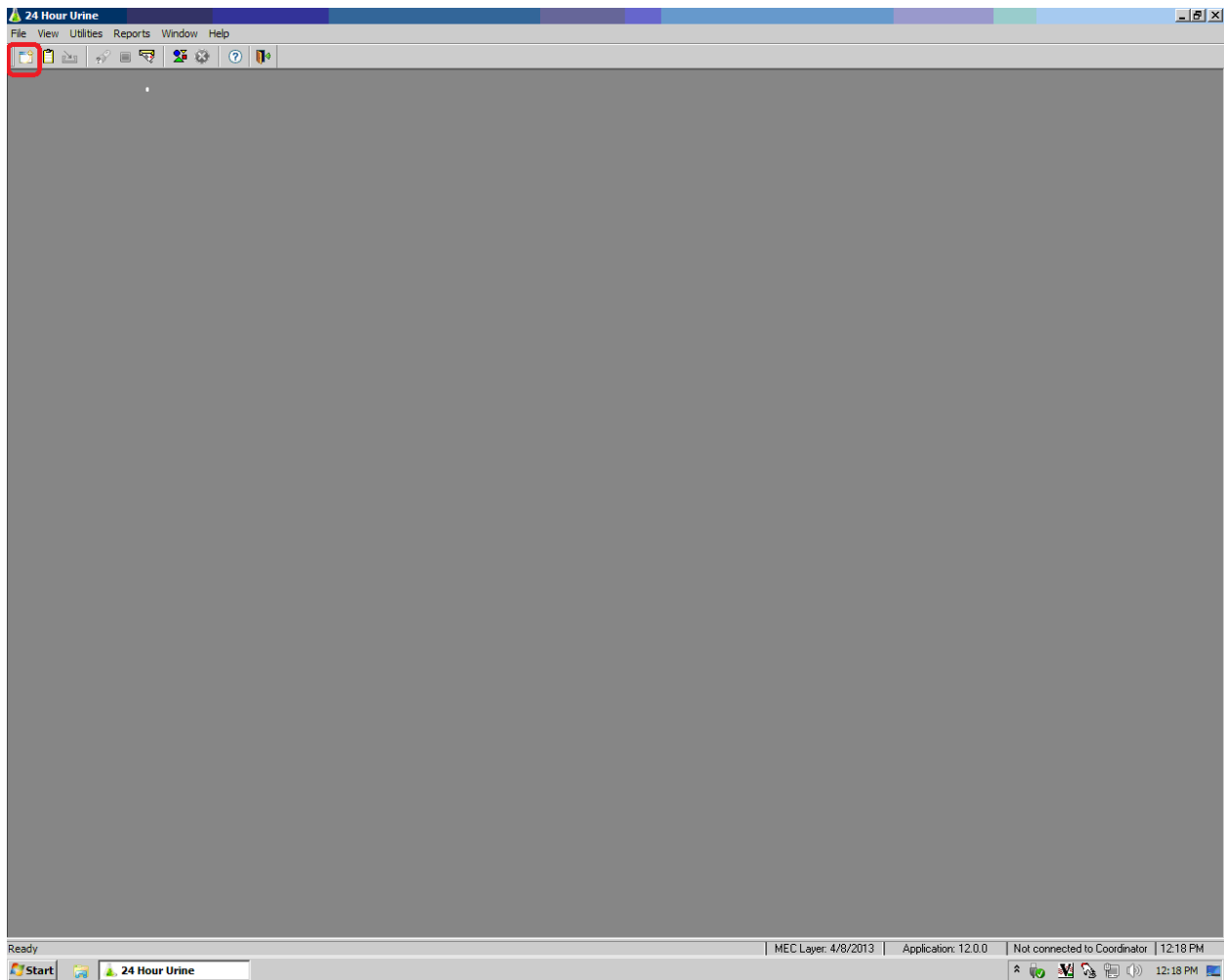
#### 5.1.1 Logging onto the 24-Hour Urine Compliance Application

**Exhibit 5-1. 24-Hour Urine Compliance Application**



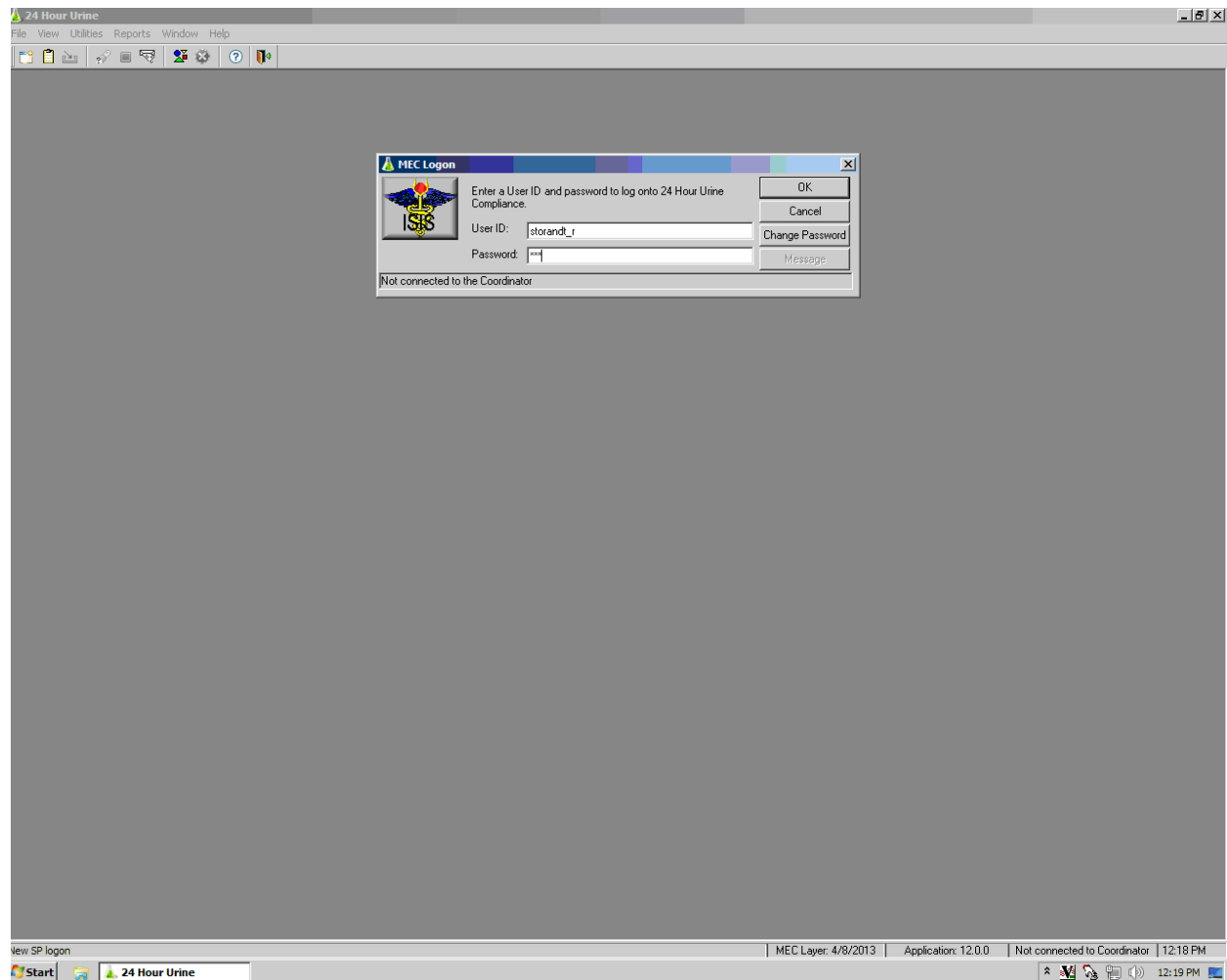
Click on the icon that looks like a window with a [+] on the upper left hand corner, to log into an SP (Exhibit 5-2). This will trigger a logon box to pop up.

Exhibit 5-2. Screen with window icon in upper left corner



Type in your user ID (last name\_first initial). Type your password, which will be assigned to you by Westat (Exhibit 5-3). This action will display the SP pickup list.

### Exhibit 5-3. Log-on to SP pickup list

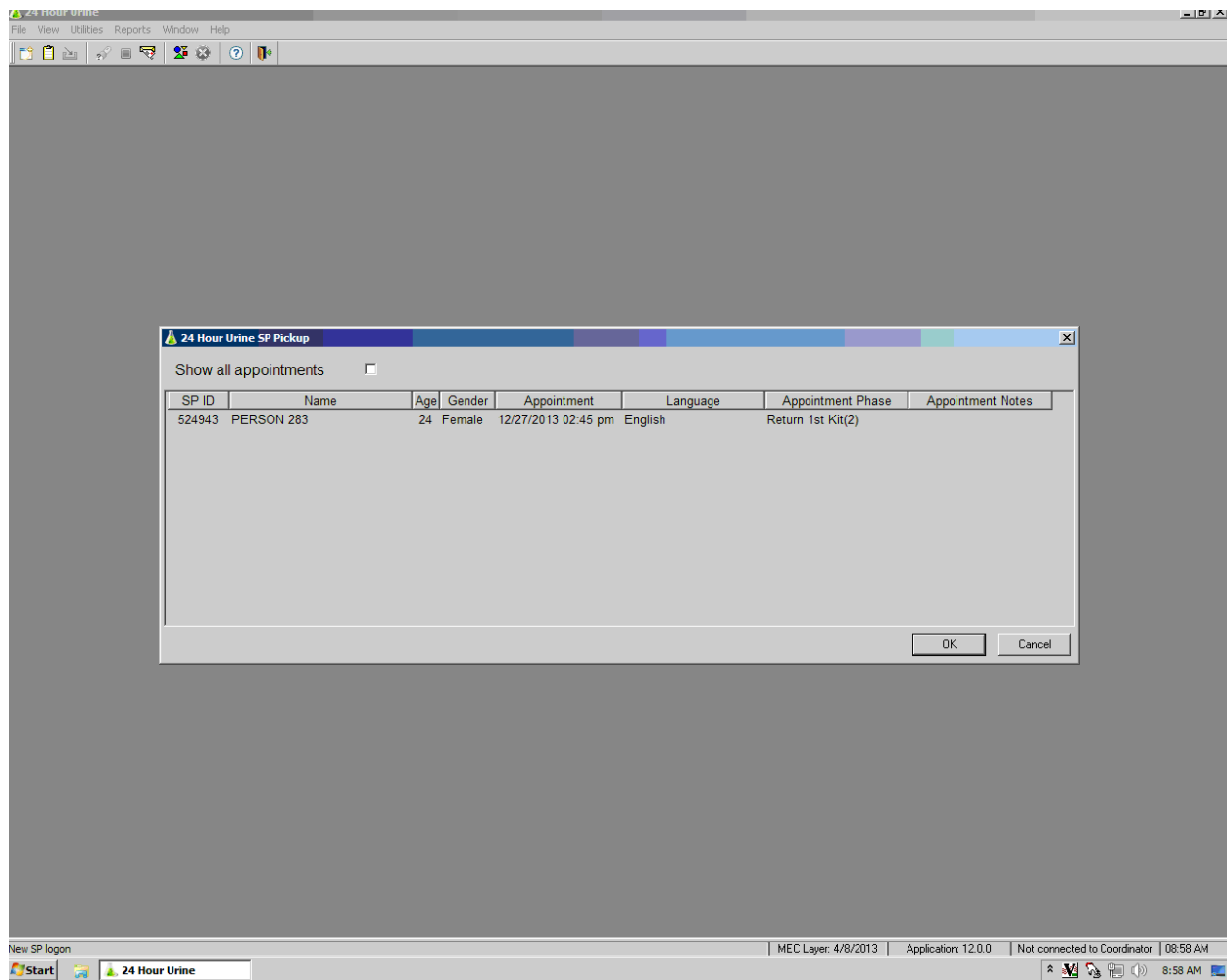




## 5.1.2 SP Log Pickup List

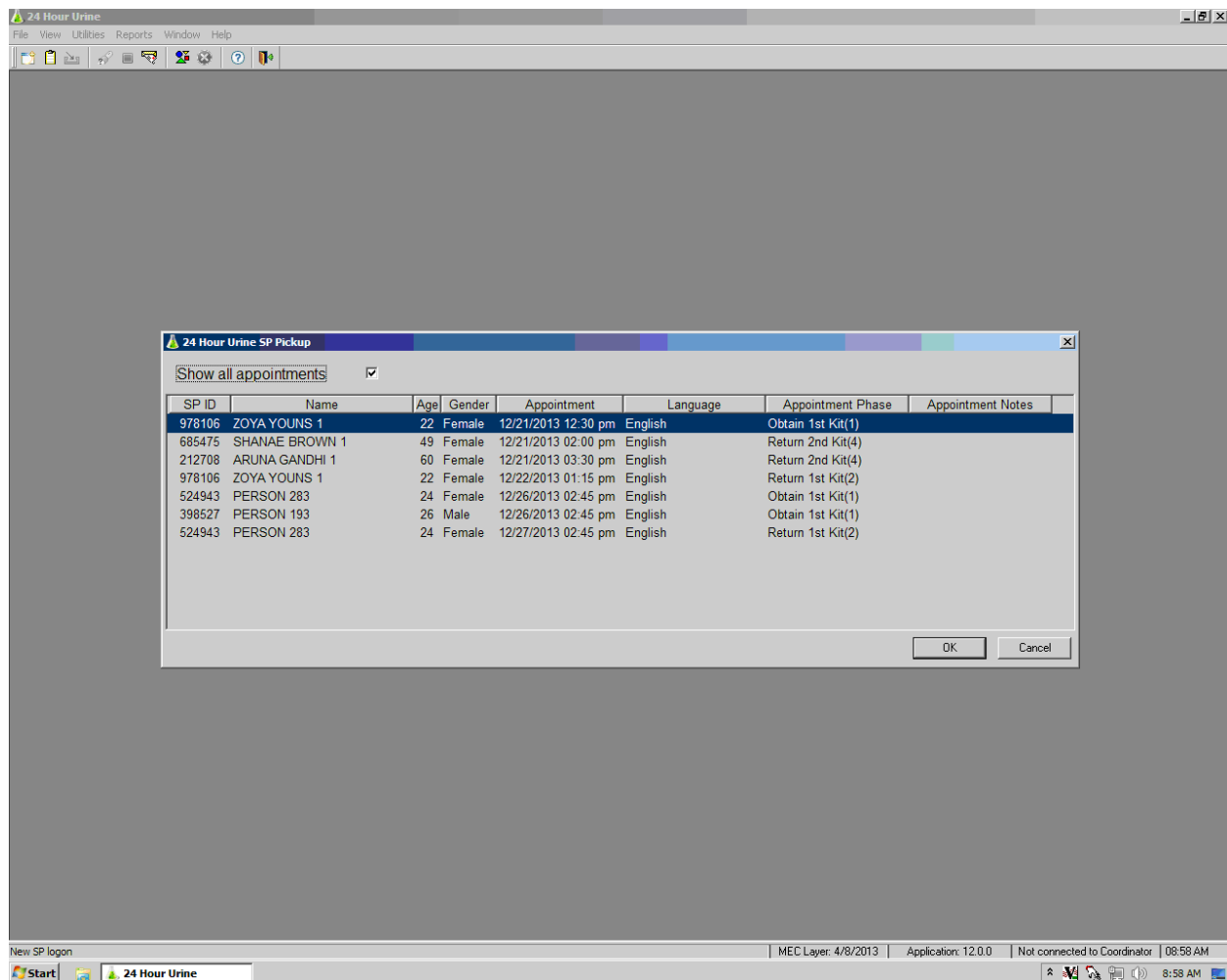
The SP pickup list (Exhibit 5-4) displays a list of SPs with their SP ID, age, gender, and appointment phase. If the SP you are working with is not displayed, click the box next to **Show all appointments** and select **OK**. This will display all the appointments that have been scheduled in the main MEC for 24-hour urine.

### Exhibit 5-4a. Show all appointments display (1)



When the Show all appointments box is selected, all appointments will be displayed that have been scheduled in the main MEC. This list can be sorted by any of the tabs listed on the screen, such as SP ID name, age, gender, appointment, language or appointment phase. Sort by SP ID to quickly locate the SP with whom you have an appointment.

#### Exhibit 5-4b. Show all appointments display (2)



### 5.1.3 Verify SP Return Appointment

- This appointment was made in the main MEC at the time the first appointment was made to pick up their kit (Exhibit 5-5).
- Write this date and time on the SP handout on the front and back pages.

**Exhibit 5-5. Verify the SP's return appointment screen**

**24 Hour Urine**

File View Utilities Reports Window Help

**24 Hour Urine: Stand:615 Session:106156 12/20/2013 10:15 am - 10:15 am**

SP ID: 205047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:30 PM

Return your 24 Hour Urine Sample

VERIFY SP RETURN APPOINTMENT

Other Family Members

Name	Age	Appointment Time	Next Appointment	Spanish
SAHITI NARDIMPALLI 1	10			No
MICHELLE YU 2	6			No

Starting Location: UMEC Ending Location: UMEC Unlink Appointments ☐

Please Select One of the Following Appointments

Show All Pickup Times ☐ Show All Return Times ☐

Pick up urine kit from UMEC

Date	Day of Week	Time
12/20/2013	Friday	10:15 AM
12/20/2013	Friday	05:00 PM
12/20/2013	Friday	05:00 PM
12/20/2013	Friday	05:45 PM
12/20/2013	Friday	05:45 PM
12/20/2013	Friday	06:30 PM
12/20/2013	Friday	06:30 PM

Return kit to the UMEC

Date	Day of Week	Time	Hours	Schedule
12/21/2013	Saturday	12:30 PM	26	<input checked="" type="checkbox"/>

Not Scheduled ☐

Reason

Appointment Notes

BEGIN INSTRUCTING SP

1 of 3

End of Section Close Exam Finish

ready MEC Layer: 4/8/2013 Application: 12.0.0 Not connected to Coordinator 04:29 PM

Start 24 Hour Urine 4:30 PM

**5.1.4 Begin Instructing SP**

Use the appropriate handout, either starting and ending the collection in the UMEC or starting and ending the collection at home, and in the correct language.

### 5.1.5 Receipt for Transportation Allowance

The receipt is set to automatically print (Exhibit 5-6). Retrieve the printout from the printer located in the central waiting area. Have the SP sign the receipt to verify that payment was received. Save the receipts in the designated area. These will be required to reconcile your cash at the end of each day.

This receipt is for transportation only, as the SP comes in to pick up his or her kit and start the 24-hour urine collection.

SPs who have walked over from the MEC or taken a taxi to their UMEC appointment will not be paid for transportation. Click in the transportation box and enter zero for the amount. The total should say \$0. This receipt will automatically print.

It is possible to add child care: \$5.25 per hour at 2 hours per visit, which will round up to \$11. This should only be added if the SP asks for it; never offer it to the SP.

**Exhibit 5-6. Transportation allowance screen**


The screenshot shows a software window titled "24 Hour Urine". The menu bar includes File, View, Utilities, Reports, Window, and Help. The status bar at the top displays "24 Hour Urine: Stand:615 Session:106156 12/20/2013 10:15 am - 10:15 am". Below this, patient information is shown: "SP ID: 206047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:30 PM". The main section is titled "Transportation Token of Appreciation". It contains the text "Token of appreciation amount to be paid to the SP". Below this, there are three rows of input fields: "Transportation" with a value of 35.00, "Child Care" with an empty field, "Rate/ hour" with a value of 5.25, and "Total" with a value of 35.00. At the bottom of the window, there are navigation buttons: "End of Section", "Close Exam", and "Finish". The Windows taskbar at the bottom shows the Start button, the application icon, and the system clock at 4:31 PM on 12/20/2013.

Category	Amount
Transportation	35.00
Child Care	
Rate/ hour	5.25
Total	35.00

**5.1.6 Printed Receipt for Transportation**

Save the printed receipt for your daily accounting and reconciling (Exhibit 5-7). This is proof of what you have paid out and will be needed by the field office for reconciling the UMEC advances of cash.

## Exhibit 5-7. Printed receipt for transportation

	National Health and Nutrition Examination Survey
524943	
SP Name: PERSON 283	
Date of Appointment: 12/29/2013	
Payment Type	Payment Amount
Transportation:	\$45.00
Total Payment:	\$45.00
Please sign here to acknowledge receipt of payment	
12/29/2013 12:24:33	

### 5.1.7 24-Hour Urine Exam Status Screen

This application screen (Exhibit 5-8) displays the status of the exam. Choices are **Complete**, **Partial**, and **Not Done**: “Complete” means the exam was completed, “Partial” means some of the exam was complete, and “Not Done” means none of the exam was done.

Exhibit 5-8. 24-hour urine exam status screen

24 Hour Urine

File View Utilities Reports Window Help

24 Hour Urine: Stand:615 Session:106156 12/20/2013 10:15 am - 10:15 am

SP ID: 205047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:30 PM

24 Hour Urine Phase 1 Appointment Status

Status

☒ Complete

☐ Partial

☐ Not Done

Comments

Other text

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 12.0.0 Not connected to Coordinator 04:30 PM

## **5.2 Returning the First 24-Hour Urine Collection (Phase 2)**

Log on to the 24-Hour Urine Compliance Application using the instructions listed in Sections 5.1.1 and 5.1.2. Click on the correct SP and the phase that the SP is in.

### **5.2.1 Completion Questionnaire**

The completion questionnaire will be the first item displayed when logging onto an SP that is returning his or her 24-hour urine. This questionnaire is described in detail in Chapter 6. If SP has been selected to perform a second 24-hour urine collection, screens in Sections 5.2.5 and 5.2.6 will display prior to the receipt and status screens. Half of the SPs who collect their first 24-hour urine will be eligible for a second collection. The selection is random based on a complete first collection.

### **5.2.2 Receipt for Collecting 24-Hour Urine**

The receipt is set to automatically print (Exhibit 5-9). Retrieve the printout from the printer located in the central waiting area. Have the SP sign the receipt to verify payment was received. Save the receipts in the designated area. These will be required to reconcile your cash at the end of each day.

This receipt is for transportation and the incentive to collect the 24-hour urine, which is \$100. It is possible to add child care (\$5.25 hour at 2 hours per visit), which will round up to \$11. This should only be added if the SP asks for it; never offer it to the SP.



Exhibit 5-9. First 24-hour urine collection token of appreciation

24 Hour Urine

FileViewUtilitiesReportsWindowHelp

24 Hour Urine: Stand:615 Session:106178 12/21/2013 12:30 pm - 12:30 pm

SP ID: 206047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:22 PM

First 24 Hour Urine Collection Token of Appreciation

Token of appreciation amount to be paid to the SP

Base

100

Transportation

35.00

Child Care

Rate/ hour

5.25

Total

135.00

4 of 6


End of SectionClose ExamFinish

ReadyMEC Layer: 4/8/2013Application: 12.0.0Not connected to Coordinator04:28 PM

Start24 Hour Urine

Actual printed receipt (Exhibit 5-10) follows:

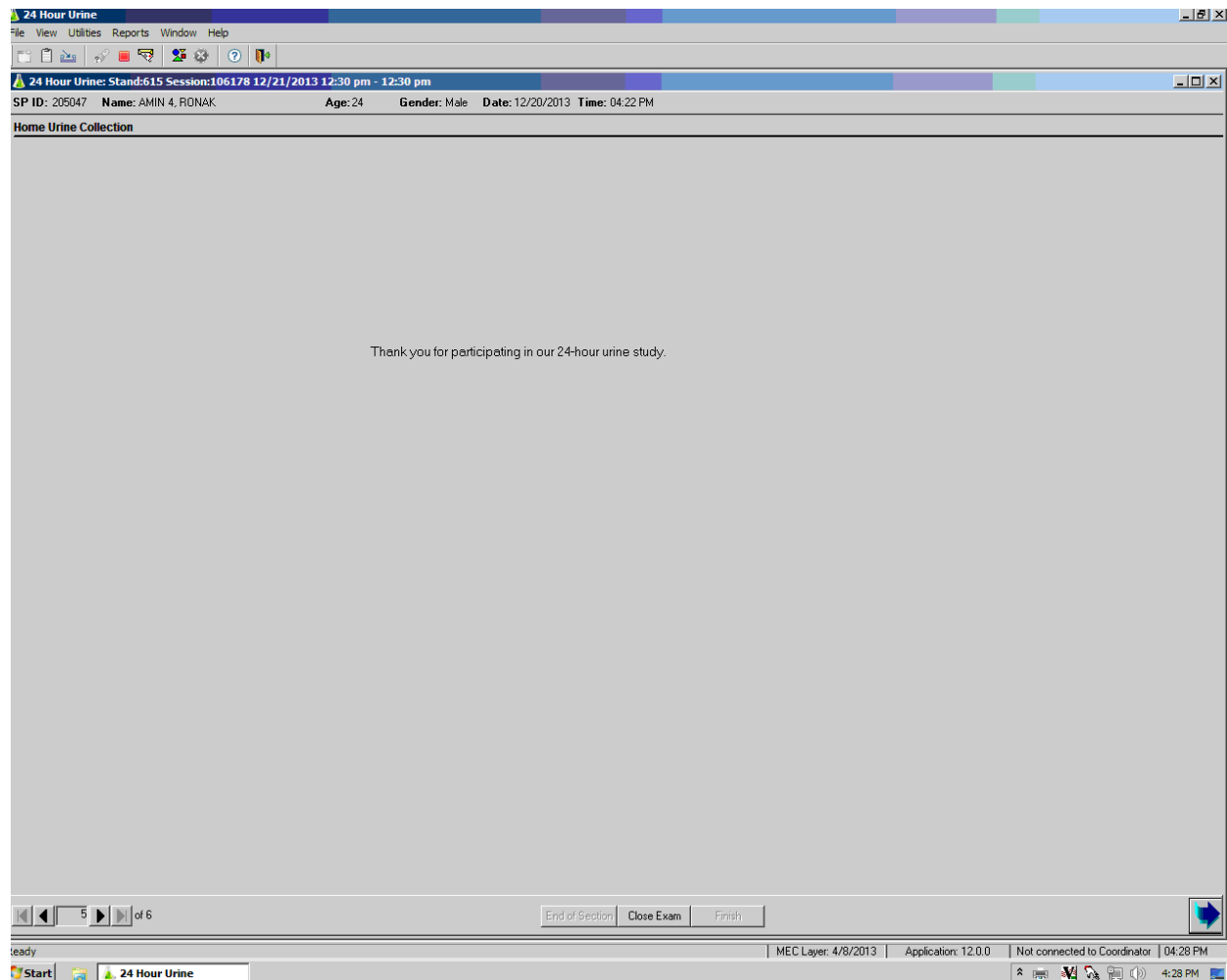
Exhibit 5-10. Printed receipt—first 24-hour urine collection token of appreciation

	National Health and Nutrition Examination Survey
212708	
SP Name: ARUNA GANDHI 1	
Date of Appointment: 12/29/2013	
Payment Type	Payment Amount
Basic Remuneration:	\$100.00
Transportation:	\$35.00
Total Payment:	\$135.00
<hr/> Please sign here to acknowledge receipt of payment	
12/29/2013 12:23:52	

### 5.2.3 Thank You for Participating

The application will prompt the examiner to thank the SP for participating in the 24-hour urine study (Exhibit 5-11).

**Exhibit 5-11.** Thank-you prompt screen



## 5.2.4 24-Hour Urine Exam Status Screen

This application screen displays the status of the exam (Exhibit 5-12). Choices are **Complete**, **Partial**, and **Not Done**: “Complete” means the exam was completed, “Partial” means some of the exam was complete, and “Not Done” means none of the exam was done.

**Exhibit 5-12. 24-Hour urine exam status screen**

24 Hour Urine

File View Utilities Reports Window Help

24 Hour Urine: Stand:615 Session:106178 12/21/2013 12:30 pm - 12:30 pm

SP ID: 205047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:22 PM

24 Hour Urine Phase 2 Appointment Status

Status

☒ Complete

☐ Partial

☐ Not Done

Comments

Other text

End of Section Close Exam Finish

MEC Layer: 4/8/2013 Application: 12.0.0 Not connected to Coordinator 04:28 PM

4:29 PM

## 5.2.5 SPs Eligible for Second 24-Hour Urine Collection

Read the complete script to the SP (Exhibit 5-13). Mark if the SP is willing to participate with “yes” or “no.” Do not ask the SP because this is a technician observation question. If the SP answers no,” go to the **Reason for refusal to participate in the second 24-hour urine collection.** This is a free text box that should be as detailed as possible as to why the SP is unwilling to participate.

### Exhibit 5-13. Recruitment script

The screenshot displays the '24 Hour Urine' application window. The title bar reads '24 Hour Urine: Stand:615 Session:106100 12/17/2013 11:00 am - 11:00 am'. The menu bar includes 'File', 'View', 'Utilities', 'Reports', 'Window', and 'Help'. The toolbar contains icons for file operations and help. The main content area is titled 'Second 24 Hour Recruitment' and contains the following text:

We appreciate the time you spent collecting your urine. With this information we will learn about people's nutrition. However, research has shown that food intakes change from day to day and the changes can be measured in the urine. A second day of information can give us a more complete picture of people's nutrition. Your participation is voluntary. May I make an appointment for you to repeat the 24-hour urine collection? You will receive an additional \$100 for your time when you return your urine sample.

Below the text, there is a question: 'IS SP WILLING TO PARTICIPATE?' with a dropdown menu currently set to 'No'. Underneath this is a label 'Reason for refusal to participate in the second 24-Hour Urine collection' followed by a large, empty text box for input.

The bottom of the window features a navigation bar with 'End of Section', 'Close Exam', and 'Finish' buttons. The Windows taskbar at the very bottom shows the 'Start' button, the application icon, and the system clock at 4:35 PM on 4/8/2013.

## 5.2.6 Schedule SP Appointment to Pick Up Second 24-Hour Urine Kit

The second 24-hour urine collection should be scheduled 3-10 days after the first collection (Exhibit 5-14).

The application is programmed to display the best possible appointment, based on the SP's randomized collection days, in green. If none of the ideal appointments work for the SP, click on the **Show all pick up times** to display more appointments. The less ideal appointments are displayed in black.

If none of the appointments available will work for the SP:

- Offer the SP the option to start and end the collection at home
- The SP can schedule at a later time, by checking the **Not scheduled** box. You must enter a reason for not scheduling.
- The pickup and return time appointments can be unlinked, which means the SP can start at UMEC and end at home. These options should be used as a last resort. Ideally every SP should start and end the collection in the UMEC.

If the SP cannot return within the 3-10 days, it is best to schedule past the 10 days.

The second urine collection should be scheduled on a different day from the first collection, unless there is no other day the SP can make it before the stand ends.

**Exhibit 5-14. Scheduling SP to pick up second 24-hour urine kit**

**24 Hour Urine**  
File View Utilities Reports Window Help

24 Hour Urine: Stand-615 Session:106100 12/17/2013 11:00 am - 11:00 am

SP ID: 706730 Name: 399, PERSON Age: 41 Gender: Male Date: 12/20/2013 Time: 04:33 PM

**Schedule second 24 Hour Urine Appointment**

SCHEDULE SP APPOINTMENT

Other Family Members

Name	Age	Appointment Time	Next Appointment	Spanish
PERSON 422	48			No

Starting Location: UMEC Ending Location: UMEC Unlink Appointments ☐

Please Select One of the Following Appointments

Show All Pickup Times ☐ Show All Return Times ☐

Pick up urine kit from UMEC			Return kit to the UMEC				
Date	Day of Week	Time	Date	Day of Week	Time	Hours	Schedule
12/20/2013	Friday	05:00 PM	12/21/2013	Saturday	07:15 PM	24	<input checked="" type="checkbox"/>
12/20/2013	Friday	05:00 PM	12/21/2013	Saturday	07:15 PM	24	<input type="checkbox"/>
12/20/2013	Friday	05:45 PM	12/21/2013	Saturday	08:00 PM	24	<input type="checkbox"/>
12/20/2013	Friday	05:45 PM	12/21/2013	Saturday	08:00 PM	24	<input type="checkbox"/>
12/20/2013	Friday	06:30 PM	12/21/2013	Saturday	08:45 PM	25	<input type="checkbox"/>
12/20/2013	Friday	06:30 PM	12/21/2013	Saturday	08:45 PM	25	<input type="checkbox"/>
12/20/2013	Friday	07:15 PM					

Not Scheduled ☐  
Reason:   
Appointment Notes:

End of Section Close Exam Finish

**5.3 Picking up Second 24-Hour Urine Collection Kit (Phase 3)****5.3.1 Logging into the 24-Hour Urine Compliance Application**

Follow the instructions listed earlier under Section 5.1.1.



### 5.3.2 SP Log Pickup List

Pick the correct SP using the SP pickup list. Follow instructions in Section 5.1.2.

### 5.3.3 Verify the SP's Return Appointment

This appointment was made in the main MEC at the time the first appointment was made to pick up their kit. Write this date and time on the SP handout on the front and back pages. Follow instructions listed earlier in Section 5.1.3

### 5.3.4 Begin Instructing the SP

Use appropriate handout in the correct language. Follow the instructions listed in Section 5.1.4.

### 5.3.5 Receipt for Transportation Allowance

The receipt is set to automatically print. Retrieve the printout from the printer located in the central waiting area. Have the SP sign the receipt to verify that payment was received. Save the receipts in the designated area. These will be required to reconcile your cash at the end of each day. See instructions listed in Section 5.1.5.

### 5.3.6 24-Hour Urine Exam Status Screen

This application screen displays the status of the exam (Exhibit 5-15). Choices are **Complete**, **Partial**, and **Not Done**: “Complete” means the exam was completed, “Partial” means some of the exam was complete, and “Not Done” means none of the exam was done.



Exhibit 5-15. 24-Hour urine exam status screen

24 Hour Urine

File View Utilities Reports Window Help

24 Hour Urine: Stand:615 Session:106156 12/20/2013 10:15 am - 10:15 am

SP ID: 205047 Name: AMIN 4, RONAK Age: 24 Gender: Male Date: 12/20/2013 Time: 04:30 PM

24 Hour Urine Phase 1 Appointment Status

Status

☒ Complete

☐ Partial

☐ Not Done

Comments

Other text

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: T2.0.0 Not connected to Coordinator 04:30 PM

Start 24 Hour Urine 4:31 PM

## 5.4 Returning Second 24-Hour Urine Collection (Phase 4)

Log on to the 24-hour urine compliance applications using the instructions listed earlier in Sections 5.1.1 and 5.1.2.

### 5.4.1 Completion Questionnaire

The completion questionnaire will be the first item displayed when logging into an SP who is returning the 24-hour urine. This questionnaire is described in detail in Chapter 6. See instructions listed in Section 5.2.1.

### 5.4.2 Receipt for Collecting 24-Hour Urine

Follow instructions in Section 5.2.2.

### 5.4.3 Thank You for Participating

Follow instructions in Section 5.2.3.

### 5.5.4 24-Hour Urine Exam Status Screen

This application screen displays the status of the exam (Exhibit 5-16). Choices are **Complete**, **Partial**, and **Not Done**; “Complete” means the exam was completed, Partial means some of the exam was complete, and “Not Done” means none of the exam was done. Follow instructions listed earlier in Section 5.2.4.

# Completion Questionnaire

# 6

The Completion Questionnaire utilizes the Blaise® application, which is interviewing software. When this application is triggered, you will see several screens appear on top of one another; be patient and wait for the questionnaire to appear before touching any keys. Once the questionnaire is displayed, do not X out of the application because it is difficult to bring back the questionnaire for that SP.

This application allows you to go back to previous screens by holding the shift and tab keys at the same time or by pressing the back arrow key to go back to the previous screen.

## 6.1 Observation Questions

The first page of the Completion Questionnaire (Exhibit 6-1) consists of observation questions, meaning they are answered by the technician. UCQ901-UCQ904 are completed based on the technician's observation. Do not read the questions to the participants.

The first question asks, WAS THE TIME OF URINE COLLECTION RECORDED? The correct response to the question is "Yes" or "No." If the start date and time and the end date and time were written on the label on the 24-hour urine collection container, record the answer as "Yes." If one or more of the date or times are not written on the label, record the answer as "No." Use the mouse to fill in the bubble next to the correct answer.

Exhibit 6-1. Page 1 of the Completion Questionnaire

Blaise 4.8 Data Entry - c:\isis\comp323\COMP

Forms Answer Navigate Options Help Recording

PAUSE RESUME STOP

RONAK AMIN 4 (24, M) Yr16.s323.v1

1. YES  
2. NO

1

WAS THE TIME OF URINE COLLECTION RECORDED?

COLLECTION START DATE 12/19/2013

COLLECTION START TIME 8:00AM

COLLECTION END DATE 12/20/2013

COLLECTION END TIME 9:00AM

LENGTH OF THE COLLECTION TIME 25:00

WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS? 1. YES  
2. NO

1

WAS THE TOTAL AMOUNT OF URINE COLLECTION MORE THAN 400 ML? 1. YES  
2. NO

WHERE WAS THE URINE COLLECTION STARTED? 1. UMEC  
2. HOME

WHERE WAS THE URINE COLLECTION ENDED? 1. UMEC  
2. HOME

Start 24 Hour Urine C:\Windows\system32\c... Blaise 4.8 Manipula Blaise 4.8 Data Entry ... 4:25 PM

COLLECTION START DATE. Enter the start date that is written on the label of the 24-hour collection container in the answer box in Exhibit 6-2.

- To display the current month's calendar for the collection start and end dates, click on the down arrow beside that answer box. Use the mouse to select the correct date.

**Exhibit 6-2. Collection start date**

Blaise 4.8 Data Entry - c:\isis\comp323\COMP

Forms Answer Navigate Options Help Recording

PAUSE RESUME STOP

ARUNA GANDHI 1 (60, F) Yr16.s323.v1

1. YES  
2. NO

1

WAS THE TIME OF URINE COLLECTION RECORDED?

COLLECTION START DATE

COLLECTION START TIME

COLLECTION END DATE

COLLECTION END TIME

LENGTH OF THE COLLECTION TIME

WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS?

1. YES  
2. NO

December 2013

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

COLLECTION START TIME. Enter the start time that is written on the label of the 24-hour collection container in the answer box in Exhibit 6-3.

**Exhibit 6-3. Collection start time**

Blaise 4.8 Data Entry - c:\isis\comp323\COMP

Forms Answer Navigate Options Help Recording

PAUSE RESUME STOP

ARUNA GANDHI 1 (60, F) Yr16.s323.v1

1. YES  
2. NO

1

WAS THE TIME OF URINE COLLECTION RECORDED?

COLLECTION START DATE

12/28/2013

COLLECTION START TIME

9:00AM

COLLECTION END DATE

COLLECTION END TIME

LENGTH OF THE COLLECTION TIME

WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS?

1. YES  
2. NO

December 2013

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

The following information items are included in Exhibit 6-4:

**COLLECTION END DATE.** Enter the end date that is written on the label of the 24-hour collection container.

- To display the current month's calendar for the collection start and end dates, click on the down arrow beside that answer box. Use the mouse to select the correct date.

**COLLECTION END TIME.** Enter the end time that is written on the label of the 24-hour collection container.

**LENGTH OF THE COLLECTION TIME.** The application will automatically calculate this based on the start date and time and the end date and time.

**WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS?** The application will mark as appropriate.

**WAS THE TOTAL AMOUNT OF URINE COLLECTION GREATER THAN 400mL?**

- Samples that are close to this volume must be weighed before answering this question. If the 24-hour urine sample volume <400mL, the urine will not be processed and tested.

**WHERE WAS THE URINE COLLECTION STARTED?** Correct answers are UMEC or Home.

**WHERE WAS THE URINE COLLECTION ENDED?** Correct answers are UMEC or Home.

Exhibit 6-4. Completion Questionnaire information items

Blaise 4.8 Data Entry - c:\isis\comp323\COMP

Forms Answer Navigate Options Help Recording

PAUSE RESUME STOP

COLLECTION START DATE	3/17/2014
COLLECTION START TIME	4:14PM
COLLECTION END DATE	3/18/2014
COLLECTION END TIME	4:00PM
LENGTH OF THE COLLECTION TIME	23:46
WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS?	<input checked="" type="radio"/> 1. YES <input type="radio"/> 2. NO
WAS THE TOTAL AMOUNT OF URINE COLLECTION MORE THAN 400 ML?	<input checked="" type="radio"/> 1. YES <input type="radio"/> 2. NO
WHERE WAS THE URINE COLLECTION STARTED?	<input checked="" type="radio"/> 1. UMEC <input type="radio"/> 2. HOME
WHERE WAS THE URINE COLLECTION ENDED?	<input type="radio"/> 1. UMEC <input checked="" type="radio"/> 2. HOME

## 6.2 Example of the Observational Questions

UCQ901. WAS THE TIME OF URINE COLLECTION RECORDED?

YES ..... 1  
 NO ..... 2 (Go to end of section)

UCQ902. WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS?

YES ..... 1  
 NO ..... 2 (Go to end of section)

UCQ903. WAS THE TOTAL AMOUNT OF URINE COLLECTION MORE THAN 400 ML?

YES ..... 1  
 NO ..... 2

UCQ904a. WHERE WAS THE URINE COLLECTION STARTED?

- UMEC ..... 1
- HOME ..... 2

UCQ904b. WHERE WAS THE URINE COLLECTION ENDED?

- UMEC ..... 1
- HOME ..... 2

### 6.3 Special Program Functions

In any screen in this application, the technician can leave a free text remark. Click on the **Answer** tab to bring up the **Make Remark** option, or press the F6 key to bring up a free text remark box, as shown in Exhibits 6-5 and 6-6. Type your response in the box provided.



## Exhibit 6-5. Answer tab/Make Remark option

Blaise 4.8 Data Entry - c:\siscomp323\COMP

Forms | Answer | Navigate | Options | Help | Recording

Don't Know F8  
Refuse F7  
Make Remark F6  
Repeat F12

PAUSE RESUME STOP

RON 6.s323.v1

1. YES  
2. NO

1

WAS THE TIME OF URINE COLLECTION RECORDED?

COLLECTION START DATE 12/19/2013

COLLECTION START TIME 8:00AM

COLLECTION END DATE 12/20/2013

COLLECTION END TIME 9:00AM

LENGTH OF THE COLLECTION TIME 25:00

WAS THE LENGTH OF THE COLLECTION TIME MORE THAN 22 HOURS? 1. YES  
2. NO

1

WAS THE TOTAL AMOUNT OF URINE COLLECTION MORE THAN 400 ML? 1. YES  
2. NO

1

WHERE WAS THE URINE COLLECTION STARTED? 1. UMEC  
2. HOME

1

WHERE WAS THE URINE COLLECTION ENDED? 1. UMEC  
2. HOME

1

Start 24 Hour Urine C:\Windows\system32\c... Blaise 4.8 Manipula Blaise 4.8 Data Entry ... 4:24 PM

Exhibit 6-6. Free text remark box

Blaise 4.8 Data Entry - c:\sis\comp323\COMP

Forms Answer Navigate Options Help Recording

PAUSE RESUME STOP

RONAK AMIN 4 (24 M) Yr16.s323.v1

1. YES  
2. NO

1

WAS THE TIME OF URINE COLLECTION RECORDED?

COLLECTION START DATE 12/19/2013

COLLECTION START TIME 8:00AM

COLLECTION END DATE 12/20/2013

COLLECTION END TIME 9:00AM

LENGTH OF THE COLLECTION TIME 25:00

WAS THE LENGTH OF THE COLLECTION MORE THAN 22 HOURS?

Remark  
Free text...

1. YES  
2. NO

1. UMEC  
2. HOME

1. UMEC  
2. HOME

WAS THE TOTAL AMOUNT OF URINE COLLECTION MORE THAN 400 ML?

WHERE WAS THE URINE COLLECTION STARTED?

WHERE WAS THE URINE COLLECTION ENDED?

Start 24 Hour Urine C:\Windows\system32\c... Blaise 4.8 Manipula Blaise 4.8 Data Entry ... 4:25 PM

All the questions in the Completion Questionnaire allow for “Yes,” “No,” “Refused,” or “Don’t Know” responses, except for the probing questions. If the SP doesn’t know the answer to the question you have asked, click on the red question mark (?) on the top left of the screen (Exhibit 6-7).

#### Exhibit 6-7. Red question mark

The screenshot displays the Blaise 4.8 Data Entry application window. The title bar reads "Blaise 4.8 Data Entry - C:\isis (comp329 (COMP...". The menu bar includes "Forms", "Answer", "Navigate", "Options", "Help", and "Recording". Below the menu bar is a toolbar with icons for a question mark, a red question mark, a document, a save icon, and a delete icon. To the right of these icons are three buttons: "PAUSE" (yellow), "RESUME" (green), and "STOP" (red). The main area of the window is a large yellow rectangle. In the top left corner of this yellow area, there is a small red question mark icon. Below the yellow area, there is a section with two radio button options: "1. YES" and "2. NO". At the bottom of the window, there is a grey bar with the text "UCQ002" and a small white square. The Windows taskbar at the bottom shows the Start button, a clock displaying "24 Hour Urine", and several open application windows including "C:\Windows\system32\...", "Blaise 4.8 Manipula...", and "Blaise 4.8 Data Entry ...". The system clock in the bottom right corner shows "4:27 PM".

If the SP refuses to answer a question in the Completion Questionnaire, click on the exclamation point (!) on the top left of the screen (Exhibit 6-8).

#### Exhibit 6-8. Exclamation point

Blaise 4.8 Data Entry - C:\isis\comp323\COMP

Forms Answer Navigate Options Help Recording

ARUN Refuse answer (60. F) Yr16.s323.v1

Were you having your period at any time in the last 24 hours (during the 24 hours you collected your urine)?

☐ 1. YES

☐ 2. NO

UCQ001

## 6.4 Questions for SP to Determine Completeness of the Sample

“We would like to ask you several questions about your experience in collecting the urine for a 24-hour period. Your answers to these questions will not affect your payment.”

[Do not prompt or lead the SP to the answers to these questions. The SP should answer the questions without any influence from the examiner.

For example, do not say, “All the urine is in the containers, right?” The SP will most likely answer “yes” when asked in this fashion.

In this application, you can add a remark by pressing F6 or clicking on the answer tab and selecting “Make Remark.” A free text box will appear on the screen. Type your remark in the space provided.]

## 6.5 Example of the 24-Hour Urine Completion Questionnaire

UCQ001 (FOR FEMALES ONLY) Were you having your period at any time in the last 24 hours (during the 24 hours you collected your urine)?

YES ..... 1  
 NO ..... 2  
 REFUSED ..... 7  
 DON'T KNOW ..... 9

UCQ002. During the 24 hours, did you collect your urine every time you used the bathroom to urinate?

YES ..... 1 (UCQ004)  
 NO ..... 2  
 REFUSED ..... 7 (UCQ004)  
 DON'T KNOW ..... 9 (UCQ004)

UCQ003. How many times did you miss?

Interviewer instruction: Probe the amount of the void. Do not count as "miss" if the missed void was only a few drops.

|\_|\_| times

REFUSED ..... 77  
 DON'T KNOW ..... 99

UCQ004. Is there any urine missing from the storage containers for any other reason such as spilling?

YES ..... 1  
 NO ..... 2 (UCQ007)  
 REFUSED ..... 7 (UCQ007)  
 DON'T KNOW ..... 9 (UCQ007)

UCQ005. Were more than a few drops of urine lost?

YES ..... 1  
 NO ..... 2 (UCQ007)  
 REFUSED ..... 7  
 DON'T KNOW ..... 9

UCQ006. How many times did this happen?

|\_|\_| times

REFUSED ..... 77  
DON'T KNOW..... 99

UCQ007. Many people when having a bowel movement also urinate. Was there any time when you were not able to collect the complete urine sample because of a bowel movement?

Interviewer instruction: Probe the amount of the void. Do not count as “miss” if the missed void was only a few drops.

YES ..... 1  
NO ..... 2 (UCQ009)  
REFUSED ..... 7 (UCQ009)  
DON'T KNOW..... 9 (UCQ009)

UCQ008. How many times did this happen?

|\_|\_| times

REFUSED ..... 77  
DON'T KNOW..... 99

UCQ009. Were you able to keep the storage containers cold in the cooler with ice packs or in the refrigerator until this appointment?

YES ..... 1 (UCQ011)  
NO ..... 2  
REFUSED ..... 7 (UCQ011)  
DON'T KNOW..... 9 (UCQ011)

UCQ010. How long was the sample not kept cold?

|\_|\_| minutes/hours

REFUSED ..... 7  
DON'T KNOW..... 9

UCQ011. Did you perform this collection on a day that you also went to work?

YES .....	1
NO .....	2
DO NOT WORK.....	3
REFUSED .....	7
DON'T KNOW.....	9

UCQ012. When collecting the sample, did you have any difficulty in remembering or carrying out the instructions?

YES (specify.....)	1
NO .....	2
REFUSED .....	7
DON'T KNOW.....	9

UCQ013. Did you have any other problem when collecting the 24-hour urine sample?

YES (specify.....)	1
NO .....	2
REFUSED .....	7
DON'T KNOW.....	9

UCQ014. Did you eat or drink more or less than you normally do because you were collecting your urine?

Interviewer instruction: If SP ate or drank more for another reason, do not include.

YES (specify.....)	1
NO .....	2
REFUSED .....	7
DON'T KNOW.....	9

UCQ015. Is there any other liquid in the container besides your urine?

YES (specify.....)	1
NO .....	2
REFUSED .....	7
DON'T KNOW.....	9

## 6.6 Reasons Why the 24-Hour Urine Is Not Complete

If the 24-hour urine is determined from the questionnaire to be not complete, the sample container will be weighed in the urine processing application, but the urine will not be processed into vessels and sent to the testing laboratories.

- If the collection time can't be ascertained.
- If the collection time is less than 22 hours.
- If the 24-hour urine sample volume <400mL.
- If a female was menstruating during the collection.
- If the SP missed collecting more than a few drops of urine during the collection period.

## 6.7 Procedures for 24-Hour Urine In-Person Home Visit

An in-person home visit should always be considered as an option to having an SP participate, however, as a last resort. Remind any hesitant SPs that, if they come to the UMEC, they will receive the transportation incentive as well as the participation incentive. In the case of lack of transportation, always offer a taxi free of charge to the SP. If neither of these are options, then schedule the in-person home visit.

The following steps should be taken when the UMEC staff finds it necessary to conduct an in-person home visit.

- First schedule this visit in the Field Followup Management System (FFMS). The visit can be scheduled under the “not scheduled” tab, the “call history” tab, or the “reschedule” tab. When picking the times, click on the dropdown box and change the default “UMEC” option to “in-person.” This indicates in the FFMS that you will need to go to the SP's home.
- Schedule the in-person home visit at a time when two technicians are scheduled to work in the UMEC.



- It may be necessary to discuss plans to conduct the in-person home visit with the Study Manager or another member of the field office staff. Items to discuss could include:
  - Anticipated travel time from the UMEC to the SP's home depending on the time of day.
  - Special considerations when visiting the SP or the household.
- Once you have completed the above steps, contact Maureen McTighe so that she can block out the appropriate amount of time in the FFMS for the UMEC staff to complete this visit.
- Bring all necessary supplies for the 24-hour urine collection.
- When going to pick up a urine sample, check the label print application in the lab to see if the SP will be eligible for a second collection and bring supplies for a second 24-hour urine collection.
- If the SP is eligible for home urine collection (HUC), make an appointment with the SP to return with the HUC kits and instructions.
- Once you arrive at the SP's home, use the Westat provided cell phone to call the UMEC. Complete the SPs Completion Questionnaire over the phone with the SP and the technician in the UMEC.
- Since this is an in-person home visit, please remember to zero out the transportation amount at the end of the compliance application.
- Similarly, when going to the in-person home visit to pick up a sample, please remember to zero out the transportation and pay only the \$100 incentive amount. Bring at least two copies of the receipt form with you.
- Make sure you have the correct amount of petty cash with you to pay the SP.
- Upon returning to the UMEC, please alert Maureen McTighe to any difficulties you had with this visit.

### **Quick Checklist**

- ☐ Remind SP that if he or she comes to UMEC, he or she will receive both transportation and \$100 incentives
- ☐ Offer taxi service as necessary, free of charge to the SP
- ☐ If UMEC is still not an option, schedule in-person home visit

**Scheduling and planning for the home visit**

- ☐ Schedule in-person home visit in FFMS
  - Schedule under one of the following tabs: “not scheduled,” “call history,” or “reschedule”
  - Pick a time by clicking the drop-down box and changing the default, “UMEC” to the “in-person” option
- ☐ Discuss your plans for in-person home visit with the Study Manager or other field office staff, including:
  - Anticipated travel time from the UMEC to SP’s home depending on the time of day
  - Special considerations when visiting the SP or the household
- ☐ Contact Maureen McTighe to block out an appropriate amount of time for in-person home visit
- ☐ Bring all necessary supplies for 24-hour urine collection
- ☐ When picking up a urine sample, bring supplies for second 24-hour urine collection
- ☐ If the SP is eligible for HUC, make a return appointment to bring HUC kit and instruct SP
- ☐ Bring at least two copies of the receipt form with you
- ☐ Bring the correct amount of petty cash to pay the SP

**At the SP’s home**

- ☐ At SP’s home, use Westat cell phone to call UMEC to complete Completion Questionnaire over the phone with SP and technician in the UMEC
- ☐ Put a zero for transportation amount at the end of the questionnaire
- ☐ When picking up SP’s sample, also put zero for transportation amount and pay \$100 incentive

**After the home visit**

- ☐ Inform Maureen McTighe of any difficulties you had with the home visit.

6.7.1      Receipt to Use for In-Person Home Visits (Exhibit 6-9)

Exhibit 6-9.      UMEC Receipt Calculation and Signature Form

**UMEC Receipt Calculation and Signature Form**

Name\_\_\_\_\_

SP ID\_\_\_\_\_

Date\_\_\_\_\_

Segment Number\_\_\_\_\_

Base Incentive	
Transportation	
Adult/Child Care	
Total	

Signature\_\_\_\_\_

Amount Received \$\_\_\_\_\_

## 24-Hour Urine Petty Cash System

# 7

### 7.1 Remuneration Incentives for 24-Hour Urine

#### 7.1.1 Remuneration

- Each SP who comes to the UMEC to pick up the 24-hour urine supplies will receive a transportation allowance, **except** for SPs who walk over from the MEC or come via taxi.
- Each SP who returns to the UMEC to drop off a 24-hour urine sample will receive a \$100 incentive, plus a transportation allowance.

#### 7.1.2 Transportation

- SPs are encouraged to provide their own transportation in order to receive the additional transportation incentive.
- Transportation incentive amounts are determined at the start of each stand and will be provided to the urine technicians at the time of setup.
- The transportation incentive will be displayed on the 24-hour urine receipt, in the 24-hour urine application. Examples of receipts are listed as Exhibit 7-11.
- The transportation incentive is determined using the Household ID number, which consists of a 9-digit number in this form: 615-**12**-1-3, where 615 is the stand number and 12 is the segment number. The segment number determines the SP's transportation allowance. This is completed using the FFMS application. Refer to the FFMS training procedures for detailed instructions.
- Transportation incentives are per vehicle, which means that all family members that come to the UMEC at the same time in the same vehicle get one payment.
- If an SP from the household comes to the appointment at a different time, or at the same time but in a different vehicle, then an additional allowance can be paid.
- For transportation by taxi, the field office attempts to arrange a voucher system or direct bill to Westat to pay for cab fare. The taxi company provides vouchers that the lab technician can use for the cab drivers when they drop off or pick up SPs.
- **The taxi driver should wait for the SP.**

### 7.1.3 Child Care/Adult Care

- The hourly reimbursement fee for child or adult care is \$5.25 per hour.
- Allow the SP 2 hours of child/adult care. The system will round this to an even \$11.
- If an SP needs a “helper” to get to the appointment, this person can be reimbursed only if he or she is not related to the SP.

## 7.2 Obtaining Petty Cash from the Field Office

See the 2014 schedule to pick up cash advances from the field office on setup day (Exhibit 7-5).

### 7.2.1 Large Advance

The 24-Hour Urine MEC will have one technician from each team responsible for picking up advanced money and reconciling these advances. The 24-Hour Urine MEC will be following the MEC schedule and, for the most part, having the same days off. See schedule listed in Exhibit 7-5.

On setup day, both UMEC technicians will go to the field office to pick up **two** advances:

- The first advance will be in the amount of **\$14,010** (see Exhibit 7-1).
- This will be signed for by the designated UMEC technician.
- Every **stand at setup will need this amount of money.**
- The money will be transported to the UMEC and locked in the safe.
- This money will be reconciled when additional money is needed.
- Portal reports (see attached example), plus signed **receipts** will be utilized to reconcile. Refer to section 7.3.
- The large advance will be **split equally** between the two UMEC technicians (see Exhibit 7-2).
- The second technician will sign the receipt, taking responsibility for half the money (see Exhibit 7-3).

Exhibit 7-1. Start of stand advance – large

Start of stand advance		
Denomination	Quantity	Total amount
\$100	80	\$8,000
\$50	10	\$500
\$20	200	\$4,000
\$10	100	\$1,000
\$5	100	\$500
\$1	10	\$10
		<b>\$14,010</b>

Exhibit 7-2. Start of stand advance split by technician

Start of stand advance - split by technician		
Denomination	Quantity	Total amount
\$100	40	\$4,000
\$50	5	\$250
\$20	100	\$2,000
\$10	50	\$500
\$5	50	\$250
\$1	5	\$5
		<b>\$7,005</b>

Exhibit 7-3. Petty cash distribution receipt

<b>PETTY CASH INTERIM RECEIPT</b>	
<b>STAND:</b>	<b>ISSUED BY:</b>
<b>TRANSACTION DETAILS:</b>	
<div style="text-align: center;"> <b>DATE:</b>  <b>AMOUNT:</b>  <b>STAFF RECIPIENT:</b> </div>	
<b>RECEIVED BY:</b>	
<b>DATE:</b>	

- When more money is needed (subsequent advances), the denominations will be determined by the study manager.
  - Based on the 24-hour urine pilot, we will need three large advances from the field office.
  - The large advance must be reconciled with the field office, before receiving a second large advance.
  - The large advance must be reconciled with the field office the last day the field office is open at each stand. The field office will close approximately 3 days before the UMEC closes.

## 7.2.2 Small Advance

- The second advance will be in the amount of **\$855** (see Exhibit 7-4).
- This advance will be signed for by the second UMEC technician.
- **Every stand at setup will need this amount of money.**
- This money will be used for transportation and incentives only when the large advance is being reconciled with the field office or at the end of the stand when the large advance is returned to the field office.
- At the end of the stand for the UMEC technicians, cashier checks will be obtained for the remaining money.
- The cashier checks, receipts, and ISIS reports will be sent back to the home office to Maureen McTighe for reconciliation.

**Exhibit 7-4. Start of stand advance – small**

<b>Start of stand advance - technician 2</b>		
<b>Denomination</b>	<b>Quantity</b>	<b>Total amount</b>
\$100	5	\$500
\$50	0	\$0
\$20	10	\$200
\$10	10	\$100
\$5	10	\$50
\$1	5	\$5
		<b>\$855</b>

**Exhibit 7-5. Advance pickup schedule**

First advance: **\$14,010** (see denominations listed earlier)

Second Advance: **\$855** (see denominations listed earlier)

<b>Field Office 3 (Ron Learned):</b>		
Stand 323 pickup date	<b>January 8, 2014</b>	<b>AM/PM</b>
Stand 326 pickup date	<b>March 21, 2014</b>	<b>AM/PM</b>
Stand 329 pickup date	<b>May 23, 2014</b>	<b>AM/PM</b>
Stand 332 pickup date	<b>August 13, 2014</b>	<b>AM/PM</b>
Stand 335 pickup date	<b>October 14, 2014</b>	<b>PM/EVE</b>
<b>Field Office 1 (Liz Castillo):</b>		
Stand 324 pickup date	<b>January 26, 2014</b>	<b>SetUp</b>
Stand 327 pickup date	<b>April 9, 2014</b>	<b>PM/EVE</b>
Stand 330 pickup date	<b>June 17, 2014</b>	<b>AM/EVE</b>
Stand 333 pickup date	<b>August 30, 2014</b>	<b>PM/EVE</b>
Stand 336 pickup date	<b>November 11, 2014</b>	<b>PM/EVE</b>
<b>Field Office 2 (George Dixon):</b>		
Stand 325 pickup date	<b>February 25, 2014</b>	<b>PM/EVE</b>
Stand 328 pickup date	<b>May 3, 2014</b>	<b>AM/PM</b>
Stand 331 pickup date	<b>July 16, 2014</b>	<b>AM/PM</b>
Stand 334 pickup date	<b>September 30, 2014</b>	<b>PM/EVE</b>
Stand 337 pickup date	<b>November 29, 2014</b>	<b>AM/PM</b>

## 7.3 Handling of Petty Cash

### 7.3.1 Petty Cash Disbursement

- For all petty cash disbursements, the receipt from the ISIS computer application will print automatically.
- Have the SP sign the receipt.
- Save the receipts for reconciliation of your cash.
- Reconcile your cash on a daily basis, after your last appointment. See Section 7.3.4.1 for detailed instructions.

### 7.3.2 Petty Cash Storage

- You are responsible for your cash and for safeguarding it at all times.
- Prepare only enough petty cash for the day.



- Cash should be kept in a cash box that is locked and kept in a locked drawer.
- Store any remaining cash in the zippered money pouch and keep it in the safe at all times.
- Each technician will be given a lockbox and money pouch.
- The cash remaining in the UMEC petty cash fund, plus the value of the signed receipts, must equal the amount of cash advanced by the office manager.
- If there are any discrepancies, the study manager will contact the lab technicians to resolve.

### 7.3.3 Preparing Your Cash Box for the Day

- Pull up the daily schedule using FFMS.
- Have enough cash in your cash box to pay the transportation incentives and the incentive for collecting the 24-hour urine samples for that day.
- Keep in mind, when preparing your daily cash box, that you won't be seeing all the SPs scheduled for that day. There are two technicians on each team.
- Keep the cash box locked and in the designated locked drawer at all times.
- Take the cash box out of the locked drawer and unlock only when paying the SP.
- Immediately lock it and return it to the locked drawer.

### 7.3.4 Reconciliation of Cash Advances

#### 7.3.4.1 Daily Reconciliation of Your Cash

- Keep all your receipts for that day together in a file.
- Verify your receipts and cash on hand against the 24-Hour Urine Payment Reconciliation Report.
- To Log into the Portal
  - Double click on the Portal icon.



- Username: Nhanes\portal\_nhstaff
- Password: **Westat1**
- Select the report tab (see Exhibit 7-6).
- Scroll down in the list to find the 24-Hour Urine Payment Reconciliation Report – Report # 331 (see Exhibit 7-7).
- Double click on the report name.
- This will bring up a selection criteria screen (see Exhibit 7-8).
  - Select the correct Stand from the drop down list (see Exhibit 7-9).
  - Select the date or dates range you want to display on the report (see Exhibit 7-10).
  - Sort by technician.
  - Print the report for you only.
  - Write the beginning amount of cash you have on hand at the top of the report:  
Day 1, your starting balance will be \$7005
  - Use the report to determine the total of your receipts (the total you paid out), plus the amount of cash on hand equals your beginning balance of cash.
  - Organize your receipts in the order they are listed on your report.
  - Staple the receipts to the report.
  - Keep daily reconciliation in a locked drawer in the UMEC.
  - Example of the report (see Exhibit 7-12).

#### **7.3.4.2 Reconciliation of Large Cash Advance with the Field Office**

- Run the 24-hour urine payment report for the date ranges you are reconciling, include all 24-hour urine technicians.
- Verify that the receipts are in order, by technician, for each day.

## Exhibit 7-6. Portal reports

http://10.21.0.17/Pages/Default.aspx

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Sign In

Home

Home Reports Documents Statistical Memos Contacts Sub-Systems Data Management EPLC Special Studies NHANES Management Meeting Trailers

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Sub-Systems Data Management EPLC Special Studies NHANES Management Meeting Trailers

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**NHANESWear**

- NHANESWear Items available from Cat@Press
- NHANESWear Items available from Landi' End

**News**

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

**My Active EPLC Tasks**

**Active Stand Information**

Stand ID	MEC	Activation Status	Stand County	Interviewing Start Date	MEC Dry Run Date	Stand End Date
321	1		Orange	10/15/2013	11/04/2013	12/19/2013

## Exhibit 7-7. 24-Hour urine payment reconciliation report

http://10.21.0.17/reports/default.aspx

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Sign In

**Interviewer Reports - (Series Items)**

Access denied. You do not have permission to perform this action or access this resource.

**MEC Operations Reports**

URL	Report No.	Description
Component Status Report	300	Provides information about the number and percent of total, complete, partial and not done exams by year, stand, component, appointment type, and the reasons why an exam was not done.
Examination Times Report	301	Provides length of examination information by stand, component, and appointment type for all ages and selected age groups.
MEC Appointment Calendar	302	Provides information about the number and type of SPs scheduled for each session by stand. This information for each session includes the number of appointed SP by type (total, youth, 60+, full partial, and rescheduled), the session status (complete, available, in process, booked), and any comments entered by the FO staff.
Equipment QC Report	303	Displays results of MEC biomedical equipment quality control activities by stand and component.
Production Monitoring Report	311	This report outlines, for all of the sessions at all of the active MECs for a given day, the status and number of data points captured for each SP in those sessions.
Swab Response Rate	310	Provides the response rate by age and sampled race/ethnicity for the various swabs collected in the MEC.
Male HPV Swab Response Rate	310a	Provides the response rate for males by age and sampled race/ethnicity for the various swabs collected in the MEC.
PAM Response Rate Report	315	Provide the response rate by age group for the Physical Activity Monitor given/returned, reminder, and SPs remunerated.
PMQ Report	327	Provides information about the number of SPs eligible for the pubertal maturation section of MEC Interview, the number of SPs blocked from the section, and the reason why the SP was blocked.
Blood Pressure Recertification Report	373	Provides information by examiner, year, and certification number about the blood pressure Gold Standard consultant's comparison of simultaneous blood pressure measurement with the physician.
Urine Collection for 3-5 Year Old	316	Summary level report for 3 to 5 year olds, including the number of SPs examined, the number who agreed to provide urine specimen, and the number who provided sufficient specimen.
Urine Volume for 3-5 Year Old	317	Detail report for 3 to 5 year olds, including the check-in and check-out time, time started MEC Proxy, first and second sample time and volume, and list household member(s) in the same session.
24-Hour Urine Estimated Payment Report	318	The report will estimate the amount of cash needed for the 24-Hour Urine appointments already scheduled based on the future date range selected by the user.
<b>24-Hour Payment Reconciliation Report</b>	<b>331</b>	Th report generates a list of all deposits and payments made by a UMec technician.
24-Hour Urine Summary Report	330	This is a summary report that includes the number of SPs who agreed or refused and the number of returned kits that were compliant or non-compliant.

**MEC SP/Session Reports**

URL	Report No.	Description
MEC SP Component Completion Report	805	Provides detailed information by stand and SP including HH ID, SP ID, age, gender, session start time, check in time, first exam time, check out time, Spanish speaking, number of components eligible, number of components complete and

Exhibit 7-8. Picking the correct stand number

http://nhprodweb/ajaxrpt/Report.aspx?s=true&r=true&m=true&d=true&n=331&t=24+Hour+Urine+Payment+Reconciliation&p=UrinePaymentReconciliation/UrinePa

NHANES Report

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Sign In

National Health and Nutrition Examination Survey (NHANES)

24 Hour Urine Payment Reconciliation - Report #331

Please select your criteria

Stand: ---Select Stand---

Start Date: 12/17/2013

End Date: 12/17/2013

Got It

Exhibit 7-9. List of stands

http://nhprodweb/ajaxrpt/Report.aspx?s=true&r=true&m=true&d=true&n=331&t=24+Hour+Urine+Payment+Reconciliation&p=UrinePaymentReconciliation/UrinePa

NHANES Report

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Sign In

National Health and Nutrition Examination Survey (NHANES)

24 Hour Urine Payment Reconciliation - Report #331

Please select your criteria

Stand: ---Select Stand---

Start Date: 11/29/2013 to 01/21/2014

End Date: 11/29/2013 to 01/21/2014

322 | 11/29/2013 to 01/21/2014

321 | 11/05/2013 to 12/19/2013

320 | 10/15/2013 to 11/21/2013

319 | 09/21/2013 to 10/29/2013

318 | 08/30/2013 to 10/07/2013

317 | 08/07/2013 to 09/09/2013

316 | 07/18/2013 to 08/20/2013

315 | 06/08/2013 to 07/28/2013

314 | 05/23/2013 to 06/23/2013

313 | 04/24/2013 to 05/31/2013

312 | 04/03/2013 to 05/13/2013

311 | 03/16/2013 to 04/17/2013

310 | 02/23/2013 to 03/26/2013

309 | 01/30/2013 to 03/07/2013

308 | 01/12/2013 to 02/15/2013

307 | 11/23/2012 to 01/20/2013

306 | 11/09/2012 to 12/16/2012

305 | 10/10/2012 to 11/12/2012

304 | 09/26/2012 to 11/02/2012

303 | 08/31/2012 to 10/03/2012

302 | 08/11/2012 to 09/19/2012

301 | 07/17/2012 to 08/24/2012

300 | 06/13/2012 to 08/04/2012

299 | 05/25/2012 to 06/26/2012

298 | 04/28/2012 to 06/06/2012

297 | 04/14/2012 to 05/17/2012

296 | 03/10/2012 to 04/13/2012

295 | 02/23/2012 to 04/01/2012

294 | 02/02/2012 to 02/29/2012

**Exhibit 7-10. Choose date range for report**

http://nhprodweb/ajaxrpt/Report.aspx?s=true&r=true&m=true&d=true&n=331&t=24+Hour+Urine+Payment+Reconciliation&p=UrinePaymentReconciliation/UrinePa

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Sign In

NHANES

National Health and Nutrition Examination Survey (NHANES)

24 Hour Urine Payment Reconciliation - Report #331

Please select your criteria

Stand: 322 | 11/29/2013 to 01/21/2014

Start Date: 12/17/2013

End Date: December 2013

Su	Mo	Tu	We	Th	Fr	Sa
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: December 18, 2013

100%

4:22 PM 12/18/2013

## Exhibit 7-11. Examples of SP receipts



## National Health and Nutrition Examination Survey

212708

SP Name: ARUNA GANDHI 1

Date of Appointment: 12/29/2013

Payment Type	Payment Amount
Basic Remuneration:	\$100.00
Transportation:	\$35.00
Total Payment:	\$135.00

---

Please sign here to acknowledge receipt of payment

12/29/2013 12:23:52



## National Health and Nutrition Examination Survey

524943

SP Name: PERSON 283

Date of Appointment: 12/29/2013

**Payment Type****Payment Amount**

Transportation:


\$45.00

**Total Payment:****\$45.00**

Please sign here to acknowledge receipt of payment

12/29/2013 12:24:33

Exhibit 7-12. Example of 24-hour urine payment report

 <b>National Health and Nutrition Examination Survey (NHANES)</b> Report: 24 Hour Urine Payment Reconciliation by Technician Report #331 Stand: 312 Hudson (Jersey City), NJ Date Range: 4/1/2013 to 4/15/2013					
Date	SP ID	SP Name	Appt Phase	Technician	Payment
4/11/2013	361384	PHILLIPS, ELLIOT	Return 1st Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/11/2013	462633	HALL, MICHAELA	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/11/2013	598449	BUTLER, CADENCE	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/11/2013	755755	MURPHY, JULIET	Return 1st Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/11/2013	794845	STEWART, JULIA	Return 2nd Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/11/2013	943135	MURPHY, COLTON	Return 1st Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/12/2013	462633	HALL, MICHAELA	Return 1st Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/12/2013	598449	BUTLER, CADENCE	Return 1st Kit	CARLOS LOAYZA	
			Base Amt		100
			Transportation Amt		30
4/13/2013	119797	BENNETT, HENRY	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/13/2013	260037	EVANS, EVAN	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/13/2013	536231	HAYES, WYATT	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/13/2013	544890	POWELL, BRODY	Obtain 1st Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/13/2013	658691	HOWARD, JACK	Obtain 2nd Kit	CARLOS LOAYZA	
			Transportation Amt		30
4/13/2013	701035	MOORE, ELLIOT	Obtain 1st Kit	CARLOS LOAYZA	

- Verify that the total of the receipts, plus the cash on hand, equals the total amount of the large advance.
  - Take all remaining cash from the large advance, plus all receipts paid from that advance, plus the 24-hour urine payment reports to the field office.
  - The office manager will verify that all the money is accounted for from the advance and close out this advance in the petty cash system. The field office will code the advance as SP Remuneration – 24 Hour Urine (see Exhibit 7-13).



Exhibit 7-13 presents a record of transactions for an NHANES stand.

**Exhibit 7-13. Coding out advance – field office**

**Petty Cash - Field Office**

File View Insert Reconcile Reports Tools Window Help

**Transactions for Stand #311**

Trans	Date	Loc	R	Payee	Type	Rcpt	Payment	Deposit	Balance	Created By
31100510	03/29/13	F	*	Deposit	D			9,950.00	17,480.72	Dixon, George E
31100551	03/29/13	F	*	Transfer to MEC	T		6,500.00		10,980.72	Dixon, George E
31100407	03/29/13	F	*	Dyenne Longoto- See receipts-SP Remuneration -	P	✓	1,570.00		9,410.72	Dixon, George E
31100555	03/30/13	F	*	Office Depot-Office Supplies	P	✓	9.62		9,401.10	Dixon, George E
31100636	04/01/13	F	*	Deposit	D			7,000.00	16,401.10	Dixon, George E
31100639	04/03/13	F	*	Transfer to MEC	T		6,900.00		9,501.10	Dixon, George E
31100654	04/08/13	F	*	Dyenne Longoto-SP Remuneration - Other	P	✓	3,595.00		5,906.10	Dixon, George E
31100809	04/09/13	F	*	Target-Other	P	✓	150.00		5,756.10	Dixon, George E
31100810	04/09/13	F	*	USPS-Post Office	P	✓	92.00		5,664.10	Dixon, George E
31100811	04/09/13	F	*	Walmart-Office Supplies	P	✓	10.16		5,653.94	Dixon, George E
31100812	04/09/13	F	*	Office Max-Office Supplies	P	✓	36.06		5,617.88	Dixon, George E
31100813	04/09/13	F	*	Deposit	D			5,750.00	11,367.88	Dixon, George E
31100842	04/10/13	F	*	Transfer to MEC	T		5,250.00		6,117.88	Dixon, George E
31100869	04/12/13	F	*	Deposit	D			4,000.00	10,117.88	Dixon, George E
31100807	04/13/13	F	*	Dyenne Longoto- See receipts-SP Remuneration -	P	✓	1,562.00		8,555.88	Dixon, George E
31100960	04/14/13	F	*	Costco-Office Supplies	P	✓	39.23		8,516.65	Dixon, George E
31101004	04/15/13	F	*	Deposit	D			800.00	9,316.65	Dixon, George E
31101005	04/15/13	F	*	Harris Teeter-Other	P	✓	115.66		9,200.99	Dixon, George E
31101006	04/15/13	F	*	Harris Teeter-Other	P	✓	18.86		9,182.13	Dixon, George E
31100902	04/15/13	F	*	Dyenne Longoto- See receipts-SP Remuneration -	P	✓	1,175.00		8,007.13	Dixon, George E
31101011	04/16/13	F	*	Esteban Pena De La Paz-Interpreter	P	✓	65.56		7,941.57	Dixon, George E
31101012	04/16/13	F	*	Transfer to MEC	T		1,500.00		6,441.57	Dixon, George E
31101014	04/16/13	F	*	Takara-Other	P	✓	10.14		6,431.43	Dixon, George E
31101015	04/16/13	F	*	Takara-Other	P	✓	121.93		6,309.44	Dixon, George E
31101089	04/17/13	F	*	Deposit-Transfer from MEC	D			770.00	7,079.44	Dixon, Daniel D
31101091	04/17/13	F	*	Office Max-Office Supplies	P	✓	37.34		7,042.10	Dixon, George E
2221	04/22/13	F	*	Bank of America-Cash Returned at EOS	P	✓	1,247.10		5,795.00	Gibson, Jeneia
31101008	04/24/13	F	*	Dyenne Longoto- See receipts-SP Remuneration - 24	P	✓	3,665.00		2,130.00	Dixon, George E
2226	04/24/13	F	*	Bank of America-Cash Returned at EOS	P	✓	2,130.00		0.00	Gibson, Jeneia
2273	12/23/13	F	*	Bank of America-Cash Returned at EOS	P	✓			0.00	Hogan, Jacques P

**Field Office End Balance: 0.00**

**Payment** (Selected)

Payee: Dyenne Longoto- See receipts  
 Category: SP Remuneration - 24 Hour Urine  
 Comment: 24 Hour Urine  
 Final Receipt: ☒ Receipt Date: 04/22/2013  
 Reason no receipt:   
 Amount: 3,665.00  
 Created by: Dixon, George E

Trans Number: 31101008  
 Date: 04/24/2013

Save Cancel

**Search Criteria**

Category:   
 User:   
 Date: 00/00/0000  
 Payee:   
 Location: Field Office  
 Type:   
☒ Show Reconciled  
 Clear Search

## 7.4 End of Stand Petty Cash Reconciliation Procedure

After you have paid out your last remuneration to an SP, complete the following steps.

1. Print Report 331, "24 Hour Payment Reconciliation by UMEC technician" from the Portal. This report should reflect the dates covered for the most recent cash advancement from the field office.
2. Reconcile your receipts against this report and make any necessary notations regarding the payments, i.e., a receipt that should have been zeroed out because the SP was a walkover, etc.

3. Obtain a cashier's check or money order(s) for the remainder of the money you have. A fee may be charged for obtaining a cashier's check or money order. Attach the receipt to your TER and you will be reimbursed for the fee.
4. Prepare a FEDEX package to send the cashier check(s) and copies of documents, including printed reports, and the receipts, to Maureen McTighe. Please put all the materials in an envelope, seal it, and then put it in the FEDEX envelope. Make sure the FEDEX label has the Stand 24HU project number listed under the block that says "reference number."
5. FEDEX to:       Maureen McTighe  
                      Westat  
                      1600 Research Blvd.  
                      Room RP 5026  
                      Rockville, MD 20850  
                      301-294-4484

## 8.1 Background

Heart disease and stroke are the leading causes of death in the United States. Too much sodium can increase blood pressure, as well as the risk of heart attack and stroke. The Dietary Guidelines for Americans recommend an intake of  $\leq 2,300$  mg of sodium per day for adults in general. The recommendation for individuals in the following population groups, however, is  $< 1,500$  mg of sodium per day:

- Individuals 51 years of age or older;
- African Americans;
- Individuals with high blood pressure;
- Individuals with diabetes; and
- Individuals with chronic kidney disease.<sup>1,2</sup>

Americans eat on average about 3,300 mg of sodium a day.<sup>2</sup> The 1,500 mg recommendation applies to about half of the U.S. population overall and to the majority of adults. Eating less sodium can help prevent, or control, high blood pressure.<sup>1</sup> The Federal Government is improving data collection on sodium, including the amount of sodium people consume and their knowledge, behaviors, and health outcomes.<sup>2</sup>

Home Urine Collection allows modeling of 24-hour sodium intake based on equations developed from the 2011 NHANES Urine Calibration Study. This study collected 24-hour urine specimens where each void was collected separately. A specimen from the first morning void plus a specimen from the morning, afternoon, and evening was tested for sodium along with a specimen from the 24-hour collection. Preliminary results of modeling the results from this study indicate that the combination of the first morning void, plus the prior evening's void, best predicts the 24-hour excretion of sodium. A home urine collection of the first morning void and the prior evening's void

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<sup>1</sup> <http://www.cdc.gov/salt/>.

<sup>2</sup> <http://www.cdc.gov/VitalSigns/pdf/2012-02-vitalsigns.pdf>.

will allow an alternative and less burdensome data collection modality to estimate sodium intake if 24-hour urine collection fails to be feasible on the NHANES.

## 8.2 Description of Examination Room

The Home Urine Collection (HUC) component is located in the urine mobile examination center (UMEC). Exhibit 8-1 is an example of a HUC examination room setup. The room in the example is equipped with a desk, a shelf above the desk, storage bins on the wall, an examiner chair, and an SP chair. It also has a storage area behind the curtain where kits and extra supplies are stored.

**Exhibit 8-1. HUC exam room setup example**



## 8.3 Description of Equipment and Supplies

The following equipment and supplies have been provided for the Home Urine Collection component of NHANES.

### 8.3.1 Equipment

- Dymo label printer.

### 8.3.2 Supplies

#### **Consumable supplies include:**

- Home Urine Collection kit (pre-assembled in the NHANES warehouse):
  - White cardboard shipping box with Styrofoam insert;
  - Two, 2-ounce refrigerant gel pack pouches (Cold Ice™);
  - One 500-milliliter plastic specimen cup with screw-on lid;
  - One 7" x 8," blue, double zip plastic bag containing a biohazard sticker and contents label;
  - One 8" x 8" clear, zip closable plastic bag containing an absorbent pad;
  - Two strips of packing tape; and
  - Temperature monitoring strip (affixed to the inside lid of Styrofoam container).
- 10" x 13" zip closable plastic bag;
- Preprinted Avery U.S. Postal Service (USPS) shipping labels;
- Metered USPS postage stamps;
- Hard-copy color "WHAT TO DO Urine Collection and Shipping Instructions" in English and Spanish (Appendix C) as well as in Chinese Traditional, Chinese Simplified, Korean, and Vietnamese.
- Permanent markers, heavy point;

- Dymo labels—1” x 2<sup>1</sup>/<sub>8</sub>”;
- Jumbo paper clips;
- Poly tote hand bag with handle 20” x 20” x 5”;
- Confidentiality labels in English, Spanish, Chinese Traditional, Chinese Simplified, Korean, and Vietnamese;
- Sani-Cloth towelettes;
- 7” twist ties;
- Temperature monitoring strips (extras/replacements);
- Purell hand soap;
- SORTKWIK finger moistener;
- ¾” Scotch tape; and
- Sun and moon labels in Chinese Traditional, Chinese Simplified, Korean, and Vietnamese.

**Non-consumable supplies include:**

- Metal footstool;
- E-Z Fold stepstool - 12” black;
- Scissors;
- Tape dispenser; and
- Temperature monitor strip storage box with lid.

**Non-inventoried items:**

- Wall aid – “Label the Kit” summary (Appendix D);
- Wall aid – Laminated hard-copy “Talking Points” English and Spanish (Appendix E); and
- Container of extra HUC kit supplies.

## **8.4 Start of Stand Procedures**

### **8.4.1 Room Setup Procedures**

At the beginning of the stand, these procedures are followed to prepare the room and supplies for use. The FES will connect the computer, keyboard, mouse, dymo printer, and barcode wand.

1. Place the examiner and SP chair in the upright position.
2. Clean the area (i.e., wipe countertop).
3. Remove supplies from the storage bin and designated storage area, including the HUC display samples, and place them on the counter top. Store the extra supplies in the storage bin and/or designated storage area.

### **8.4.2 Inventory Management**

The par level for the component's supplies is set at the levels shown in Appendix D. A mid-stand inventory request for consumable supplies may be necessary to complete the stand.

#### **8.4.2.1 Start of Stand Procedures**

At the start of a stand, you will receive cases of kits that have each been pre-labeled at the warehouse as moon kits and cases of kits that have been pre-labeled as sun kits. On each sun and moon kit, there is an informational label on the outside of the lid of the Styrofoam insert inside the cardboard shipping box. The label is affixed to the lid at the warehouse. This label contains space for the SP to write the date and time of the specimen collection and information about the collection (8.8.5.3).

At the start of a stand, and as necessary on a weekly basis, make up a set number of HUC packets and tote bags. To make a packet, attach a stamp to three preprinted Avery USPS shipping labels. Put the three stamped shipping labels and one "WHAT TO DO Urine Collection and Shipping Instructions" sheet in a 10" x 13" clear Ziploc bag. These packets will be stored in a wall bin for easy access during exams. Next, apply a confidentiality label (Exhibit 8-2) to the upper middle area of each tote bag. Fold each tote bag and stack the bags in a bin in groups of 25.



Exhibit 8-2. Confidentiality label

<p><b>In order to protect your confidentiality, please do not write your name anywhere on the urine collection kit.</b></p> <p><b>However, it is very important that you urinate into the correct specimen cup. Please make sure that the picture on this label matches the label on the specimen cup and on the shipping box.</b></p>	<p><b>Para proteger su confidencialidad, por favor no escriba su nombre en ninguna parte de los materiales para tomar la muestra de orina.</b></p> <p><b>Sin embargo, es muy importante que orine dentro del envase correcto para tomar la muestra. Por favor asegúrese de que el símbolo de esta etiqueta coincide con la etiqueta del envase para la muestra y el de la caja para el envío.</b></p>
--	---

## 8.5 Inventory Management During the Stand

During the stand, store the extra stamps in the safe until it is time to make more packets. Toward the end of the stand, track how many additional packets will be needed to complete the stand. Do not put postage on shipping labels that will not be used.

If a mid-stand inventory request for consumable supplies is required to complete the stand, request what you think is needed plus a little cushion. If you are unsure if you will need more supplies to complete the stand, it is acceptable to wait until later in the stand to request supplies instead of ordering them at mid-stand. An emergency shipment can be sent during the last 2 weeks of a stand if necessary. Please allow 3 days to receive the shipment since stamps and shipping labels are printed on demand.

## 8.6 End of Stand Procedures

At the end of every stand, discard unused preprinted Avery shipping labels. Count any unused stamps and return them to the warehouse via the “Transfer Inventory to Warehouse Inventory Sheet.” Count the remaining kits as part of the end of stand inventory process and leave them onboard to continue onto the next site.



## 8.7 Urine Collection Kit Storage

A limited number of urine collection kits are shipped from the warehouse with the start of stand supplies. Each kit contains a temperature sensing strip and therefore cannot be stored in the belly compartments. Store the kits at the designated off-site space. At mid-stand inventory, submit a request for the number of supplies needed for the rest of the stand.

## 8.8 Protocol

### 8.8.1 Overview

The purpose of the Home Urine Collection (HUC) is to collect urine specimens to estimate the daily intake of sodium. Participants do not receive any results.

One-half of primary sample persons (SPs) aged 20–69 years old from the MEC are eligible for 24-hour urine. The SPs from that one-half sample who are compliant with the first 24-hour urine are also eligible for HUC. The participant is asked to take kits home and collect the first morning void and a void from the prior evening (collected between 5:30 p.m. and bedtime). The participant is instructed to collect a full void both times and mail it to the contract lab as soon as possible—ideally within 14 days. However, if he or she cannot collect it within 14 days, then he or she is asked to collect and ship it as soon as possible. The kits contain instructions on how to collect and mail the urine specimen to the testing laboratory. Each participant who agrees to participate will take home three kits even though only two samples are required. Since most people urinate more in the morning, the SP is provided with two morning kits. One of the morning kits is for overflow only. Most people need to use only one morning kit.

The contents of each kit are assembled at the warehouse and placed inside the shipping box. All other supplies are sent to the field individually and are assembled in the UMEC as needed.

In the UMEC, the examiner opens the kits, explains the contents, and provides verbal, written, and visual instructions to reinforce the procedures. A self-addressed, stamped shipping box containing a USPS Priority Mail shipping label is provided. The tracking number on the shipping label is used to track the urine shipment to the contract laboratory.

### 8.8.2 Eligibility Criteria

One-half of primary SPs aged 20–69 years old from the MEC are eligible for 24-hour urine. The SPs from that one-half sample who are compliant with the first 24-hour urine are also eligible for HUC. There are no safety exclusion criteria for HUC. There are no safety exclusion criteria for HUC.

When the examiner attempts to recruit an SP who does not speak English, and the examiner does not speak the language of the SP, a translator who does speak the language of the SP assists the examiner. The interpreter stays with the examiner and the SP for the entire examination.

The successful recruitment of the SP is an important aspect of this examination. Recruitment requires careful patience on the part of the examiner. Encourage the SP to accept the kits and follow through with the collection and shipment of the home specimen. To assist the examiner, talking points and labeling summary documents have been developed.

### 8.8.3 Pre-Examination Procedures

The Home Urine Collection ISIS application allows the examiner to (1) record that the participant consented to take kits; (2) scan the USPS tracking barcode into the system; and (3) print the labels for the kits.

Using the standard ISIS format, open the HUC application and log the SP into the exam by scanning the barcode on the SP ID bracelet or manually typing the SP ID when the SP arrives in the examination room. The HUC application consists of two screens: one exam screen and the section status screen. Once the exam screen appears, recruit the SP to participate in the component.

### 8.8.4 Recruiting the Participant to Accept the Home Collection

Invite the SP to participate in the Home Urine Collection with the assistance of the following talking points:

**English:**

- I would like to invite you to participate in a Home Urine Collection exam.
- We want to collect urine samples to measure common minerals and electrolytes in your body and how much salt you eat.
- I will ask you to collect two urine samples from home and then mail them directly to the laboratory.
- I will provide you with the urine collection kits, pre-addressed postage-paid shipping boxes, and detailed instructions to make it a very easy process for you.
- You will need to take the samples to the post office to mail them. When you mail the samples, we will send you a check for \$50.
- Would you like to participate in this exam?

**Spanish:**

- Deseo invitarle a participar en un examen en el cual usted mismo recolectará unas muestras de su orina en su hogar.
- Queremos recolectar muestras de orina para medir minerales comunes y electrolitos en su cuerpo y la cantidad de sal que usted consume.
- Le voy a pedir que recolecte dos muestras de su orina en su hogar y que las mande por correo directamente al laboratorio.
- Le daré los materiales para recolectar las muestras de su orina, unas cajas de envío con nuestra dirección y con franqueo pre-pagado y también las instrucciones detalladas para que el proceso sea muy fácil para usted.
- Usted tendrá que llevar las muestras a la Oficina de Correos para enviarlas. Cuando envíe las muestras, le mandaremos un cheque por \$50.00.
- ¿Le gustaría participar en este examen?

If an SP initially refuses the component, ask questions to determine the reason for the refusal and try to address any of his or her specific concerns. Provide reassurance and encouragement. Show the

SP the urine collection kits and describe the procedures. If he or she still refuses, code the exam as an SP refusal (Section 8.8.8).

## **8.8.5 Examination Procedures**

### **8.8.5.1 Procedures When the SP Agrees to Take a Kit**

Conveying clear and concise specimen collection instructions and shipping procedures is essential to the response rate and to specimen integrity. Once the SP agrees to participate in the home urine component, you will need:

- One moon urine collection kit
- Two sun urine collection kits
- One pre-assembled packet that contains:
  - One “WHAT TO DO: Urine Collection and Shipping Instructions” sheet
  - Three stamped USPS shipping labels
- Two tote bags with the confidentiality label already applied

Exhibit 8-3 illustrates the Home Urine Collection exam screen. It includes one drop-down list and three text boxes. Access the ISIS application drop-down box adjacent to the question, “Did the SP take a kit home with them?” The drop-down box options are either “Yes” or “No.” If No is selected, the reason must be identified on the Section Status screen.

Exhibit 8-3. Home Urine Collection exam screen

Home Urine Collection

File View Utilities Reports Window Help

Home Urine Collection: Stand:615 Session:615841 11/18/2010 01:30 pm - 05:30 pm

SP ID: 720141 Name: CHAN, JACKIE S Age: 20 years Gender: Male Date: 12/27/2012 Time: 11:56 AM

Home Urine Collection

Did the SP take a kit home with them?

Scan evening airbill barcode here

Scan morning airbill barcode here

Scan 2nd morning airbill barcode here

1 of 2

End of Section Close Exam Finish

Ready MEC Layer: 11/28/2012 Application: 10.1.0 Connected to Coordinator SP assigned to room 11:58 AM

Start NHANES - Lab Vessel Pri... Lab Subsystem Home Urine Collection 11:58 AM

If the SP agrees to take a kit, select “Yes.” The three text boxes will activate. This is where the tracking numbers will be entered for the three shipping boxes (Exhibit 8-4).

**Exhibit 8-4. HUC screen—SP answers “Yes”**

Stand:615 Session:615810 11/15/2010 08:30 am - 12:30 pm

File View Utilities Reports Window Help

Home Urine Collection: Stand:615 Session:615810 11/15/2010 08:30 am - 12:30 pm

SP ID: 784174 Name: GONZALEZ, SIENNA N Age: 30 years Gender: Female Date: 07/10/2013 Time: 12:05 PM

Home Urine Collection

Did the SP take a kit home with them? Yes

Scan evening airbill barcode here

Scan morning airbill barcode here

Scan 2nd morning airbill barcode here

1 of 2

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 10.1.0 Not connected to Coordinator 12:05 PM

Use the barcode wand to scan the USPS barcodes into the text box. Exhibit 8-5 illustrates the shipping label's tracking barcode.

**Exhibit 8-5. USPS shipping label tracking barcode**

**Scan Shipping  
Label Barcode**



You will have three USPS labels in the pre-assembled packet. Exhibit 8-6 shows the tracking numbers once the barcode has been scanned into ISIS.

Exhibit 8-6. USPS tracking numbers scanned into ISIS

Home Urine Collection

File View Utilities Reports Window Help

Home Urine Collection: Stand:615 Session:615841 11/18/2010 01:30 pm - 05:30 pm

SP ID: 720141 Name: CHAN, JACKIE S Age: 20 years Gender: Male Date: 12/27/2012 Time: 11:56 AM

Home Urine Collection

Did the SP take a kit home with them? Yes

Scan evening airbill barcode here 123456789123456789123456789123

Scan morning airbill barcode here 789456123789456123789456123789

Scan 2nd morning airbill barcode here 894563211234567897894561231238

1 of 2

End of Section Close Exam Finish

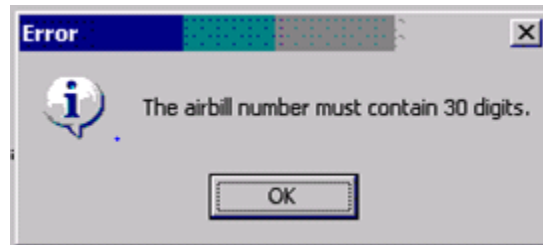
Ready MEC Layer: 11/28/2012 Application: 10.1.0 Connected to Coordinator SP assigned to room 12:01 PM

Start NHANES - Lab Vessel Pri... Lab Subsystem Home Urine Collection 12:01 PM



All USPS tracking numbers contain 30 numerals. If the tracking number field does not contain the requisite number of characters, a hard-edit stop (Exhibit 8-7) will alert the examiner to review the field and the application will not advance to the next screen.

**Exhibit 8-7. Hard-edit stop**



When a hard edit occurs, delete the tracking number entry, and re-scan the barcode. If the barcode on the envelope cannot be scanned, set this label aside and retrieve another. Return the label to the warehouse with an explanation that the barcode cannot be scanned.

Notice in Exhibit 8-4 that the text beside each data entry field indicates the kit to which the tracking number will be linked. Before the kits and shipping labels are scanned, they are not assigned to anything. Once the shipping labels are scanned, however, it is important to keep track of the order in which they are scanned. The first label scanned will be linked to the evening kit. The second label scanned will be linked to the first morning kit, and the third label scanned will be linked to the second morning/overflow kit.

Once the tracking number on the USPS label is scanned, it also becomes linked to the barcode labels that go on the specimen cups that will print out later. This is described in detail in Section 8.8.5.2. After scanning the shipping labels, apply the first label scanned to the moon box, the second label to one of the two sun boxes (it doesn't matter which one), and the third shipping label to the remaining sun box. It is still important to keep the boxes in order.

### **8.8.5.2 Labeling the Kits**

Experience has demonstrated that SPs tend to write their name somewhere on the kit. To assist the SP, a specimen cup identification system using computer-generated images has been developed to assure that the SP is using the correct specimen cup.

When the USPS barcodes have been successfully scanned into the application, select the arrow in the bottom right corner to launch the section status screen and print the labels.



Do not close the section status screen. Leave this final screen open while you explain the collection and shipping process to the SP.

When the screen is advanced to the section status screen, the Dymo printer will automatically print 10 labels. Three labels contain the SP ID number and barcode. The other seven labels containing matching pictorial (picture stickers) images will print using the household data to ensure that no two SPs in the dwelling unit are given the same picture image. An example of these two label types is illustrated in Exhibit 8-8. Note that under no circumstance should the specimen cup display any identifiable SP personal information, including the age, first name, last name, or initials.

**Exhibit 8-8. Dymo label examples**



When the labels print, remember that each barcode label is linked to a specific shipping label. You will need to put the barcode label on a specific cup according to how you applied the shipping labels to the kits (Exhibit 8-9).

Exhibit 8-9. Shipping label and barcode linkage



Apply the barcode sticker ending in 157 with the moon picture to the moon cup. Apply the barcode sticker ending in 158 with the sun picture to the sun cup that's in the box that has the USPS label that was scanned in the first morning data field. Apply the barcode sticker ending in 159 with the sun picture to the sun cup that has the USPS label that was scanned in the second morning data field.

**NOTE: The labels are not waterproof. Please put a piece of scotch tape over each barcode label. The tape will preserve the barcode if the cup leaks during transit.**

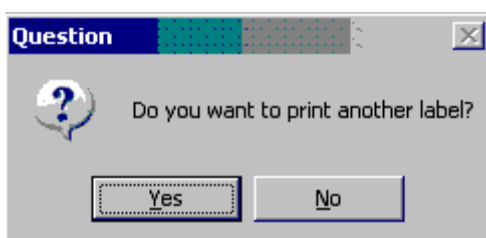
You do not need to explain this linkage to the SP. Simply ask the SP to put the moon cup back in the moon box and the sun cup back in a sun box. There are back-end procedures in place to handle situations where the SP inadvertently puts the sun cup in the wrong sun box.

Apply one picture sticker to the large tote bag beside the confidentiality label. Apply a picture sticker to each of the specimen cups beside the SP ID label on the side of the specimen cup. (Do NOT place the picture sticker on the lid of the specimen cup.) Apply a picture sticker to the bottom of each shipping box. Exhibit 8-10 illustrates the label placement. There is a wall card in the HUC room that details how to label the kits.

**Exhibit 8-10. Image label placement**

To reprint a label set, use the back navigation arrow to move back to the first Home Urine Collection screen and then advance the screen forward again.

A pop-up box (Exhibit 8-11) displays asking if you want to print another label set. Select “Yes” to reprint the labels or “No” to move forward without reprinting the labels.

**Exhibit 8-11. Reprint labels**

### 8.8.5.3 Urine Collection and Shipping Instructions

Present the urine collection and shipping instructions at the same time the kit is being labeled. The “WHAT TO DO” instruction document contains all of the information the SP needs to successfully understand the procedure and collect and ship the sample. Follow this guideline and talking points as you explain the procedures to the SP:

#### Show the SP the “WHAT TO DO, Urine Collection and Shipping Instructions.”

- Collection and shipping instructions are included in the kit you are taking home.
- If you have any questions, call the toll-free telephone number on the instructions.

#### General Overview:

- Collect two urine samples – **one** in the evening between 5:30 p.m. and bedtime and **one** the **following** morning.
- Collect your urine sample as soon as possible and ideally within the next 14 days. However, if you cannot collect it within 14 days, then please collect and ship it at your earliest convenience. [EXAMINER: Ask female SPs not to collect the samples during their period.]

*[NOTE: Tell all female SPs, regardless of age, about collecting samples during their period. If an SP collects the evening sample and starts her period overnight, she should throw the sample away and call the toll-free number to request another kit.]*

- Whenever possible, collect the evening sample when you will be able to mail it the next day along with the morning sample.
- When you get home, place the ice packs in the freezer overnight or for at least 6 hours. Freeze the ice packs flat.

#### Label the parts of the kit and show the SP his or her unique picture sticker.

- This is your special sticker. If other members in your home participate, they will have a different sticker.

*[NOTE: As you open each kit to label the cup and explain the contents, remove the ice packs and leave them on the counter. The ice packs will be put in a bag together at the end of the exam.]*

**Show the SP the difference between the evening and morning cups.**

***Evening Collection:***

- Urinate (pee) once into the cup with the sticker of the moon in the evening between 5:30 p.m. and bedtime.
- Urinate a full void (until your bladder is empty).
- Screw the lid on the specimen cup **tightly** and package it in the shipping box immediately.
- Place the cup in the small blue Ziploc bag. Squeeze the air out of the bag and **seal** it.
- Put the **sealed** Ziploc bag in the larger clear Ziploc bag. Squeeze the air out of the bag and **seal** it.
- Put two of the frozen ice packs in the box – one on the bottom and one on the side.
- Put the sample in the Styrofoam box with the moon symbol.
- Put the Styrofoam lid on the package.
- On the label on top of the Styrofoam container (Exhibit 8-12), write the date and time, and answer the questions. *[EXAMINER: Go over the label with the SP.]*


## Exhibit 8-12. Evening label on Styrofoam lid

Please write the date and time you collected the urine specimen.

Por favor anote la fecha y la hora en que tomó la muestra de orina.

Date/Fecha \_\_\_\_\_

Time/Hora \_\_\_\_\_ ☐ AM ☐ PM



**Evening Collection:**

**Muestra de orina de la tarde:**

☐ All the urine is collected in the cup. / El envase contiene toda la orina.

☐ Only a few drops are missing from the cup. / Únicamente unas pocas gotas hacen falta en el envase.

☐ More than a few drops are missing from the cup. / Más de unas pocas gotas hacen falta en el envase.

[NOTE: When answering the questions at the bottom of the label, “missing” covers all reasons why the entire void may not be in the cup (e.g., spills, too much for the cup to hold).]

- Close the box with the tape provided.
- Store the urine inside the Styrofoam container with the frozen ice pack overnight until you collect the specimen in the morning.

**Morning Collection:**

- The following morning, when you first wake up, urinate (pee) the first void into the cup with the sticker of the sun.
- Urinate in the cup until your bladder is empty. You are only collecting **one** sample that contains a full morning void. If that one sample fits in one cup, throw the other kit away. However, if you fill the first cup and you still need to go more, stop mid-stream and finish in the second morning cup.
- If you do not use the second cup with a sun on it, throw it away. Do not mail back an empty cup.
- Screw the lid on the specimen cup **tightly**.

- If you used two cups, package each cup separately.
  - *[EXAMINER: Review packaging instructions.]*
  - *[EXAMINER: Go over the label with the SP. Point out that this label is slightly different from the label on the evening kit.]*
- Please mark whether or not you are returning one or two morning cups on the label (Exhibit 8-13). If you use two morning cups, mark “2 cups” on both boxes.

#### Exhibit 8-13. Morning label on Styrofoam Lid

**Please write the date and time you collected the urine specimen.**

**Por favor anote la fecha y la hora en que tomó la muestra de orina.**

**Date/Fecha** \_\_\_\_\_

**Time/Hora** \_\_\_\_\_ ☐ AM  
☐ PM



**Morning collection - I am returning:**

**Muestra de orina de la mañana – Estoy enviando:**

☐ 1 cup only / 1 envase únicamente

☐ 2 cups / 2 envases

☐ All the urine is collected in the cup(s). / El envase contiene (los envases contienen) toda la orina.

☐ Only a few drops are missing from the cup(s). / Únicamente unas pocas gotas hacen falta en el envase (los envases).

☐ More than a few drops are missing from the cup(s). / Más de unas pocas gotas hacen falta en el envase (los envases).



***Mail the samples:***

- Take the packages to the Post Office and hand them to a teller, or take the packages to the Post Office and put them in the large priority mail-drop box. (The large priority drop box is usually located near the self-serve kiosk.)
- If the urine specimen has not been received by the laboratory in 14 days, then a reminder postcard will be sent to you. If you have already sent your urine then ignore this postcard.
- Do not mail the large outer plastic bag with your name on it to the laboratory.
- We will send you a check for \$50 as soon as you ship the package.

**8.8.6 Packing the Urine Collection Kit for the SP to Take Home**

After explaining the collection procedures and answering any questions that the SP may have, pack the urine collection kits using the following procedures.

1. Place the “WHAT TO DO Urine Collection and Shipping Instructions” and ice packs into the 10” x 13” Ziploc bag and seal the plastic bag.
2. SPs carry their kits home in a tote bag that we provide them. Two bags will be required for the three kits per SP.
3. Write the SP’s first and last name at the top of the tote bag that has the SP’s special picture sticker.
4. Place the two morning kits in one bag together. Place the moon kit and the 10” x 13” Ziploc bag containing the “WHAT TO DO Urine Collection and Shipping Instructions” and ice packs in the other tote bag.
5. Using a twist tie, tie one handle from each bag together. Make sure that the bag with the SP’s name is facing out so the bags can be easily identified.

**8.8.7 Final Steps**

After you package the kits, click “Finish” on the status screen to release the SP from the component. Exhibit 8-14 illustrates the HUC status screen.

**Exhibit 8-14. Status screen – complete**

The screenshot displays a web application window titled "Home Urine Collection: Stand:430 Session:430122 12/15/2004 05:30 pm - 09:30 pm". The header bar contains patient information: "SP ID: 921039 Name: DELANEY, JACOB Age: 17 years Gender: Male Date: 06/25/2009 Time: 08:21 PM". Below the header, the page is titled "Status Screen". The main content area features a "Status" section with three radio buttons: "Complete" (selected), "Partial", and "Not Done". Below the status options are two text input fields: "Comments" and "Other text". The "Comments" field has a dropdown arrow on its right side. At the bottom of the screen, there is a navigation bar with a "2 of 2" indicator and three buttons: "End of Section", "Close Exam", and "Finish".

### 8.8.8 Coding Not Done Exams

Choose and enter the appropriate comment code when the HUC section status is Not Done. Exhibit 8-15 illustrates the Not Done comment text box and Exhibit 8-16 lists all the possible comment codes and their intended use.

**Exhibit 8-15. Status screen – not done comments**

The screenshot shows a web form titled "Status". It contains three radio buttons: "Complete", "Partial", and "Not Done". The "Not Done" radio button is selected. Below the radio buttons is a "Comments" section with a text input field and a dropdown menu. The dropdown menu is open, showing a list of options: "SP refusal", "safety exclusion", "SP refusal", "no time", "physical limitation", "communication problem", and "equipment failure". The first "SP refusal" option is highlighted. To the right of the dropdown menu is a scroll bar. Below the dropdown menu is an "Other text" label and a text input field.

To record a comment in the Comment text box, click on the drop-down list, use the scroll bar to view all choices, and select the desired choice.

Exhibit 8-16. Comment codes

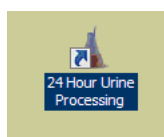
Comment code	Use when:
Safety exclusion	Not applicable.
SP refusal	The SP refuses to take a kit home.
No time	Not applicable.
Physical limitation	Not applicable.
Communication problem	SP is unable to understand and follow the instructions for the component due to cognitive impairment or other problem, and is unable to complete the test.
Equipment failure	Not applicable.
Language Barrier	SP is unable to understand and follow the instructions for the component due to language and interpreting difficulties, and is unable to complete the test.
SP ill/emergency	The SP became ill or an emergency occurred and the test was not performed on the SP.
Interrupted	An exam is interrupted, usually for a UMEC-wide emergency, and cannot be completed by the SP.
Other, specify	If the above reason for a status code of Not Done is not explained by one of the comment codes, the examiner must choose Other, specify and record a comment in the text field.

When finished, select the bright blue arrow in the bottom right corner or select **Enter**.

## Processing 24-Hour Urine Specimens

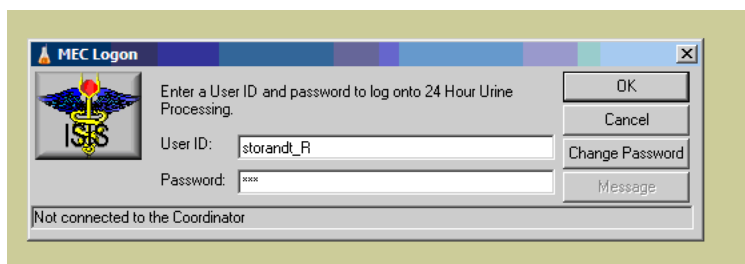
### 9.1 Logging onto 24-Hour Urine Processing

Select the icon that looks like a beaker.



Enter your User ID, which is your last name\_first initial (Exhibit 9-1). A password will be assigned to you.

**Exhibit 9-1. MEC log on**



Click on the icon that looks like a file with a (+) sign in the upper right-hand corner. This will bring up the SP log-on screen (Exhibit 9-2). Scan the barcode on one of the 24-hour urine containers to bring up the SP. Verify you have the correct SP by checking the name against the name on the 24-hour urine containers. Click OK to retrieve this SP's urine processing screen.

**Exhibit 9-2. SP log on**

The screenshot shows the '24 Hour Urine Process' application window. A 'SP Login' dialog box is open in the center. The dialog box contains the following fields and values:

Sample Person ID:		
212708		
Last Name:	SANDHI 1	Suffix:
First Name:	ARUNA	Middle Name:
Date of Birth:	07/01/1951	
Gender:	Female	Age at Interview:
Special Considerations:	60 years	
<input type="button" value="Retrieve"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>		

The application window has a menu bar (File, View, Utilities, Reports, Shipping, Window, Help) and a toolbar. The status bar at the bottom shows 'Retrieve data', 'MEC Layer: 4/8/2013', 'Application: 14.0.0', 'Not connected to Coordinator', and '12:27 PM'.

## 9.2 24-Hour Urine Processing—Weighing Containers

On the 24-hour urine processing screen (Exhibit 9-3), the date and time the collection began and ended is populated from the completion questionnaire. Verify this information is correct with the label on the 24-hour urine containers.

Place one of the 24-hour urine containers that has urine in it on the scale and click on “Get Weight.”

**Exhibit 9-3. 24-hour processing screen**

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

**24 Hour Urine Process: Stand:615 Session:106295 12/27/2013 02:45 pm - 03:30 pm**

SP ID: 398527 Name: 193, PERSON Age: 26 years Gender: Male Date: 12/27/2013 Time: 08:40 AM

Weight

Date and time 24 urine collection began: 12/26/2013 10:00 AM Date and time 24 urine collection end: 12/27/2013 08:20 AM

Length in Hours: 22

Collect	Volume (mL)	Comment Code
1		

Get Weight

☒ Disable second jug

☒ Disable third jug

Total Collected: 0

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 08:42 AM

### 9.2.1 Tare Weight

Once the weight is displayed under collection 1, a box will pop up asking if you want the application to subtract the tare weight value (Exhibit 9-4). Always click “Yes” to subtract the tare weight of the container.

**Exhibit 9-4. Option to subtract tare weight value**

The screenshot shows the '24 Hour Urine Process' application window. The title bar includes 'File', 'View', 'Utilities', 'Reports', 'Shipping', 'Window', and 'Help'. The main window displays patient information: 'IP ID: 398527', 'Name: 193, PERSON', 'Age: 26 years', 'Gender: Male', 'Date: 12/27/2013', and 'Time: 08:40 AM'. Below this, there is a section for 'Date and time 24 urine collection began:' (12/26/2013 10:00 AM) and 'Date and time 24 urine collection end:' (12/27/2013 08:20 AM), with a 'Length in Hours: 22'. A table with columns 'Collect', 'Volume (mL)', and 'Comment Code' is visible, with one row showing '1' and '1200.00'. A 'Get Weight' button is located to the left of the table. A 'Total Collecte' label is at the bottom left. A dialog box titled 'Tare Value' is open, asking 'Do you want the application to subtract the tare value for you?' with 'Yes' and 'No' buttons. To the right of the dialog box, there are two checked checkboxes: 'Disable second jug' and 'Disable third jug'.

Collect	Volume (mL)	Comment Code
1	1200.00	

**9.2.2 Adjusted Weight**

Hold the mouse over the value of the collection to see how the application derived the weight (Exhibit 9-5).



**Exhibit 9-5. Weight calculation**

**24 Hour Urine Process**  
 File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand-615 Session:106295 12/27/2013 02:45 pm - 03:30 pm

SP ID: 398527 Name: 193, PERSON Age: 26 years Gender: Male Date: 12/27/2013 Time: 08:40 AM

**Weight**

Date and time 24 urine collection began: 12/26/2013 10:00 AM Date and time 24 urine collection end: 12/27/2013 08:20 AM  
 Length in Hours: 22

Collect	Volume (mL)	Comment Code
1	1086.50	Value adjusted for tare value: (1200.00-113.5)

**Total Collected: 1086.5**

☒ Disable second jug  
☒ Disable third jug

Get Weight

End of Section Close Exam Finish

MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 08:43 AM

**9.2.3 Comment Codes**

To add a comment code to the urine volume, use the down arrow (Exhibit 9-6) to display the allowable choices:

- Laboratory Error. Use if you spilled some or all of the contents of the container.
- Jug Empty. Use if you weigh an empty jug.
- Exceeds Scale Capacity. Use if the jug weighs more than the scale can weigh, the scale will display\*\*\*\*.
- Blot clot/contamination. Use if you see blood in the urine.

## Exhibit 9-6. Comment code drop-down menu

The screenshot displays the '24 Hour Urine Process' application window. At the top, a status bar shows 'SP ID: 398527', 'Name: 193, PERSON', 'Age: 26 years', 'Gender: Male', 'Date: 12/27/2013', and 'Time: 08:40 AM'. Below this, a 'Weight' section is visible. The main data entry area includes fields for 'Date and time 24 urine collection began:' (12/26/2013 10:00 AM) and 'Date and time 24 urine collection end:' (12/27/2013 08:20 AM), with a 'Length in Hours: 22' calculated. A table with columns 'Collect', 'Volume (mL)', and 'Comment Code' is shown. The first row has '1' in the 'Collect' column, '1086.50' in the 'Volume (mL)' column, and a dropdown menu for 'Comment Code' is open, listing options: 'Laboratory Error', 'Jug Empty', 'Exceeds scale capacity', and 'Blood/clot contamination'. To the left of the table is a 'Get Weight' button. To the right are two checked checkboxes: 'Disable second jug' and 'Disable third jug'. Below the table, it says 'Total Collected: 1086.5'. At the bottom of the window, there are navigation buttons: 'End of Section', 'Close Exam', and 'Finish'. The Windows taskbar at the very bottom shows the 'Start' button, the application icon, and the system clock at 8:44 AM on 4/8/2013.

## 9.2.4 Multiple Urine Containers

If the SP has urine in more than one container, disable the second jug by removing the checkmark from the box (Exhibit 9-7). This will enable the line for the second urine collection. Place the second 24-hour urine container on the scale and press “Get Weight.”

## Exhibit 9-7. Deriving weight of second urine container

The screenshot shows the '24 Hour Urine Process' software window. The title bar indicates the session is for Stand:615, Session:106295, dated 12/27/2013 from 02:45 pm to 03:30 pm. The patient information bar shows SP ID: 398527, Name: 193, PERSON, Age: 26 years, Gender: Male, Date: 12/27/2013, and Time: 08:40 AM. The 'Weight' section is currently active.

Below the patient information, there are fields for 'Date and time 24 urine collection began:' (12/26/2013 10:00 AM) and 'Date and time 24 urine collection end:' (12/27/2013 08:20 AM). The 'Length in Hours' is set to 22.

The main data entry area contains a table with three columns: 'Collect', 'Volume (mL)', and 'Comment Code'. The first row shows '1' in the 'Collect' column, '1086.50' in the 'Volume (mL)' column, and a dropdown menu in the 'Comment Code' column. The second row shows '2' in the 'Collect' column, with empty fields for 'Volume (mL)' and 'Comment Code'. To the right of the table, there are two checkboxes: 'Disable second jug' (unchecked) and 'Disable third jug' (checked).

Below the table, the 'Total Collected' is displayed as 1086.5. A 'Get Weight' button is located to the left of the table.

The bottom of the window features a navigation bar with 'End of Section', 'Close Exam', and 'Finish' buttons. The status bar at the very bottom shows 'Ready', 'MEC Layer: 4/8/2013', 'Application: 14.0.0', 'Not connected to Coordinator', and the time '08:44 AM'.

If the SP has urine in all three urine collection containers, remove the checkmark from “Disable third jug” (Exhibit 9-8). This will enable the line for the third collection. Place the third container on the scale and press “Get Weight.”

## Exhibit 9-8. Deriving weight of third urine container

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

SP ID: 398527 Name: 193, PERSON Age: 26 years Gender: Male Date: 12/27/2013 Time: 08:40 AM

**Weight**

Date and time 24 urine collection began: 12/26/2013 10:00 AM Date and time 24 urine collection end: 12/27/2013 08:20 AM

Length in Hours: 22

Collect	Volume (mL)	Comment Code
1	1086.50	
2	500.00	
3		

Total Collected: 1586.5

Get Weight

☐ Disable second jug  
☐ Disable third jug

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 08:45 AM

## 9.2.5 Weigh Containers but Do Not Process Conditions

If the SP collected less than 400mL during the 24-hour period (Exhibit 9-9), the urine is weighed but not processed. This information will be populated from the completion questionnaire.

Exhibit 9-9. Screen indicating urine will be weighed but not processed

The screenshot displays the '24 Hour Urine Process' software interface. The title bar reads '24 Hour Urine Process'. The menu bar includes 'File', 'View', 'Utilities', 'Reports', 'Shipping', 'Window', and 'Help'. The status bar at the top shows '24 Hour Urine Process: Stand:615 Session:106295 12/27/2013 02:45 pm - 03:30 pm'. Below this, patient information is displayed: 'SP ID: 398527', 'Name: 193, PERSON', 'Age: 26 years', 'Gender: Male', 'Date: 12/30/2013', and 'Time: 11:24 AM'. The main area is titled 'Weight' and contains a 'Get Weight' button. Below the button, there are fields for 'Date and time 24 urine collection began:' (12/26/2013 10:00 AM) and 'Date and time 24 urine collection end:' (12/27/2013 08:20 AM). The 'Length in Hours' is 22. A table with three columns: 'Collect', 'Volume (mL)', and 'Comment Code' is shown. The first row has '1' in the 'Collect' column, '398.00' in the 'Volume (mL)' column, and a dropdown menu in the 'Comment Code' column. Below the table, it says 'Total Collected: 398'. To the right of the table, there are two checkboxes: 'Disable second jug' and 'Disable third jug', both of which are checked. At the bottom of the main area, a red message reads 'WEIGH URINE BUT DO NOT ALIQUOT: VOLUME LESS THAN 400mL'. The bottom status bar shows 'Ready', 'MEC Layer: 4/8/2013', 'Application: 14.0.0', 'Not connected to Coordinator', and '12:08 PM'. The taskbar at the very bottom shows the 'Start' button and two open applications: 'C:\[ss]\24 Hour Urine Pro...' and '24 Hour Urine Process'.

24 Hour Urine Process

File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand:615 Session:106295 12/27/2013 02:45 pm - 03:30 pm

SP ID: 398527 Name: 193, PERSON Age: 26 years Gender: Male Date: 12/30/2013 Time: 11:24 AM

Weight

Get Weight

Date and time 24 urine collection began: 12/26/2013 10:00 AM Date and time 24 urine collection end: 12/27/2013 08:20 AM

Length in Hours: 22

Collect	Volume (mL)	Comment Code
1	398.00	

Total Collected: 398

WEIGH URINE BUT DO NOT ALIQUOT: VOLUME LESS THAN 400mL

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 12:08 PM

If the SP was menstruating, the urine will not be processed (Exhibit 9-10). This data is populated from the completion questionnaire. Weigh only.

**Exhibit 9-10.** Screen showing that urine will be weighed but not processed because the SP was menstruating

24 Hour Urine Process

File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand:615 Session:106182 12/21/2013 03:30 pm - 04:15 pm

SP ID: 212708 Name: GANDHI, I, ARUNA Age: 60 years Gender: Female Date: 12/29/2013 Time: 12:28 PM

Weight

Date and time 24 urine collection began: 12/28/2013 09:00 AM Date and time 24 urine collection end: 12/29/2013 10:00 AM

Length in Hours: 25

Collect	Volume (mL)	Comment Code
1		

Get Weight

☒ Disable second jug

☒ Disable third jug

Total Collected: 0

WEIGH URINE BUT DO NOT ALIQUOT: MENSTRUATING

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 12:28 PM

If the collection time of the 24-hour urine sample is less than 22 hours (Exhibit 9-11), the samples will not be processed. Weigh only.

**Exhibit 9-11. Sample is only weighed because collection time was less than 22 hours**

24 Hour Urine Process

File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand:615 Session:106182 12/21/2013 03:30 pm - 04:15 pm

IP ID: 212708 Name: GANDHI 1, ARUNA Age: 60 years Gender: Female Date: 12/23/2013 Time: 12:28 PM

Weight

Date and time 24 urine collection began: 12/28/2013 09:00 AM Date and time 24 urine collection end: 12/29/2013 04:00 AM

Length in Hours: 19

Collect	Volume (mL)	Comment Code
1		

Get Weight

Total Collected: 0

☒ Disable second jug

☒ Disable third jug

WEIGH URINE BUT DO NOT ALIQUOT: LESS THAN 22 HOURS  
MENSTRUATING

End of Section Close Exam Finish

MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 12:29 PM

If the 24-hour urine collection time is greater than 26 hours, NCHS will determine if these samples should be processed. This situation will be handled on a case-by-case basis. Put in a UFO, describing the situation. Place the urine containers in the refrigerator until further notice, and call the study manager to discuss further action.

If the collection start and end date and time are not written on the containers and cannot be ascertained (Exhibit 9-12), the samples will not be processed. Weigh only.

**Exhibit 9-12.** Screen indicating sample will be weighed only, since start and end date and time cannot be ascertained

24 Hour Urine Process

File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand:615 Session:106182 12/21/2013 03:30 pm - 04:15 pm

SP ID: 212708 Name: GANDHI 1, ARUNA Age: 60 years Gender: Female Date: 12/29/2013 Time: 12:32 PM

Weight

Date and time 24 urine collection began: 00/00/0000 00:00 AM Date and time 24 urine collection end: 00/00/0000 00:00 AM

Length in Hours:

Collect	Volume (mL)	Comment Code
1	9886.50	

Get Weight

Disable second jug ☒

Disable third jug ☒

Total Collected: 9886.5

WEIGH URINE BUT DO NOT ALIQUOT: TIME NOT ASCERTAINED  
MENSTRUATING

MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 12:32 PM

### 9.3 Processing the 24-Hour Urine Samples

Example of the 24-hour urine processing screen, which shows the vessels this SP is eligible for (Exhibit 9-13). The SP in the screenshot below is not eligible for vessels 194 and 195, which are extra urine vessels that are held for future testing. This SP opted out of future research, so will not have any extra vessels stored.



Exhibit 9-13. Screen presenting vessels for which the SP is eligible

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

**24 Hour Urine Process: Stand:615 Session:110966 01/05/2014 07:00 am - 07:30 am**

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/31/2013 Time: 02:24 PM

**Urine Processing**

Tech ID: 1756		Sample ID: 898946		Name: 521, PERSON		Gender: F		Age: 38	
		SP ID: 898946		Appt Type: Primary		Fasting Req: 2			

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	Container ID	Slot#
183	Alb/Cr/UN 1		3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
184	Lytes 1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
185	Unintodine1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
186	Per/TY/NIF1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
187	TSNAs 1		10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input checked="" type="radio"/> No			
188	Vol NA 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
189	Aro amine 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
190	HAA/nict 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
191	Phyto/Caf1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
192	VOCs 1		1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
193	Ca/Ox/Mg/P1		1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			

2 of 3

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 03:06 PM

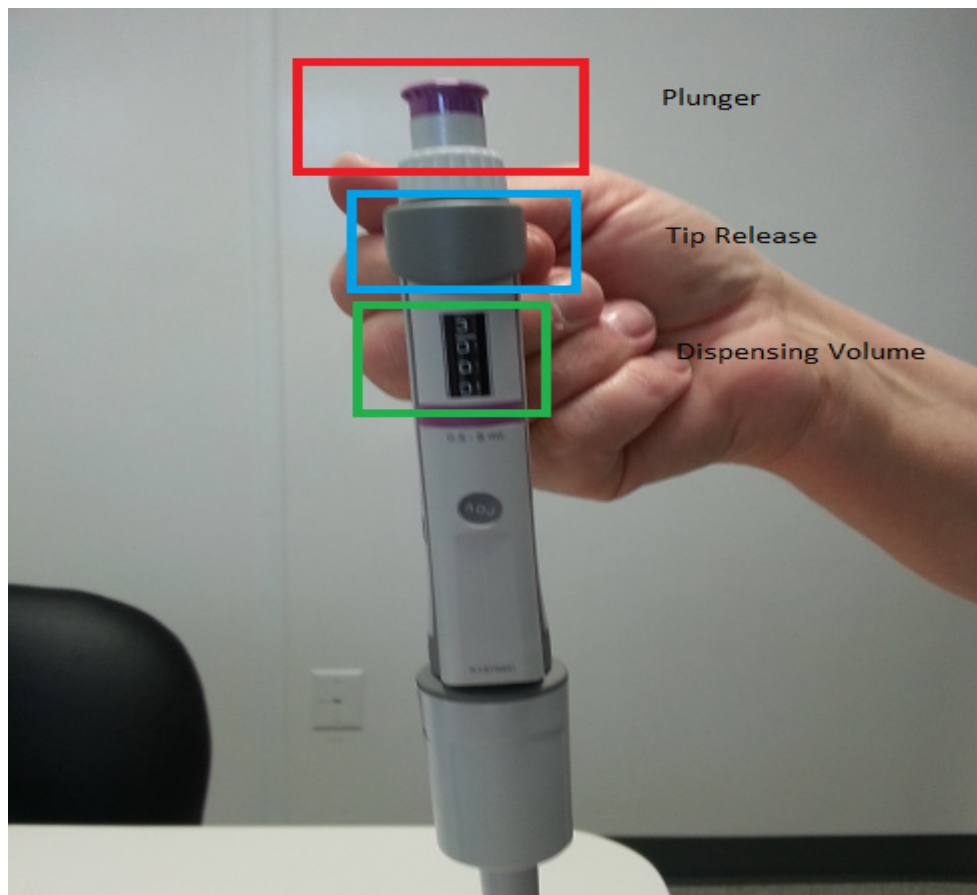
Start 24 Hour Urine Process Coordinator Console NHANES - Lab Vessel Pri... 24 Hour Urine 3:07 PM

### 9.3.1 Special Procedure for Vessels 193 and 206—Use Eppendorf Pipette to Dispense 3mL

- **Make sure the volume is set to 3000mL.** Check this each time you pipette a specimen (the dial moves easily).
- Place a pipette tip on the pipette.
- **Pre-wet the pipette tip:** Put the pipette tip in the urine and press the plunger down to the first click and release (Exhibit 9-14).
  - This will fill the tip with 3000mL of urine.
  - Dispense the urine by pushing the plunger to the 1st stop and 2nd stop.

- Pull the pipette out of the urine.
- Release the plunger.
- Press the plunger to the first stop to fill the tip with 3000mL of urine.
- Dispense the urine in a 5mL cryovial for **vessel 193/206** by pushing the plunger through the 1st and 2nd stops.
- Use the gray lever above the volume display to release the pipette tip in the trash.

**Exhibit 9-14. Utilizing the Eppendorf pipette**



Note: Save the box the pipette came in so it can be packaged in this during travel.

### 9.3.2 Filling all Vessels

To fill all vessels listed in the SP's profile, right-click on the Filled column. This will bring up two choices to pick from; **Fill All** or **Not Filled All** (Exhibit 9-15).

Exhibit 9-15. Urine processing screen

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

24 Hour Urine Process: Stand:615 Session:110966 01/05/2014 07:00 am - 07:30 am

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/31/2013 Time: 02:24 PM

Urine Processing

Tech ID: 1756 Sample ID: 898946 Name: 521, PERSON Gender: F Age: 38  
SP ID: 898946 Appt Type: Primary Req: 2

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	Container ID	Slot#
183	Alb/Cr/UN 1	3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
184	Lytes 1	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
185	Uriniodine1	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
186	Per/TY/N/F1	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
187	TSNAs 1	10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input type="radio"/> No				
188	Vol NA 1	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
189	Aro amine 1	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
190	HAA/nict 1	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
191	Phyto/Caf1	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
192	VOCs 1	1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				
193	Ca/Ox/Mg/P1	1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No				

2 of 3

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 03:07 PM

Start 24 Hour Urine Process Coordinator Console NHANES - Lab Vessel Pri... 24 Hour Urine 3:07 PM

The urine processing screen allows the user to mark each individual vessel manually, too. Use the mouse to select “Yes” or “No” for each vessel. The system will prompt you for a comment for any not filled vessels and won’t let you proceed until a comment is selected.

Once the vessels are filled, the system will generate the container ID and slot number for each vessel and display to the right of the comment field (Exhibit 9-16). Place the tubes in the correct container in the correct slot number.

Exhibit 9-16. Screen displaying customer ID and slot number for filled vessels

tr-win7

24 Hour Urine Process: Stand:615 Session:110941 01/04/2014 09:00 am - 09:30 am

SP ID: 898629 Name: 520, PERSON Age: 45 years Gender: Female Date: 01/03/2014 Time: 11:10 AM

Urine Processing

Tech ID: 1411		Sample ID: 898629		Name: 520, PERSON		Gender: F		Age: 45	
		SP ID: 898629		Appt Type: Primary		Fasting Req: 2			

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	Container ID	Slot#
183	Alb/Cr/UN 1		3.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615875	15
184	Lytes 1		2.0	U	2 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615876	12
185	UrinIodine1		2.0	U	2 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615877	11
186	Per/TY/NF1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615878	11
187	TSNAs 1		10.0	U	10 ml	VWR Screwcap	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615879	11
188	Vol NA 1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615880	12
189	Aro amine 1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615881	12
190	HAA/nict 1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615882	12
191	Phyto/Caf1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615883	11
192	VOCs 1		1.8	U	2 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615884	12
193	Ca/Ox/Mg/P1		1.5	U	2 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615885	12
194	Xtra Urine1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615886	13
195	Xtra Urine1		5.0	U	5 ml	Nalge Cryovial	<input checked="" type="radio"/> Yes <input type="radio"/> No	(none)	0615886	14

11:17 AM  
1/3/2014

To add comments to filled vessels, click on the down arrow next under the comment column for the vessels you wish to add a comment to and select the appropriate comment. It is possible to add the same comment for all vessels by right-clicking on the comment column (Exhibit 9-17), selecting filled comments, and picking the appropriate comment.

## Exhibit 9-17. Comments screen

24 Hour Urine Process: Stand:615 Session:106305 12/28/2013 08:00 am - 08:45 am

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/30/2013 Time: 06:50 PM

Urine Processing

Tech ID: 1756 Sample ID: 898946 Name: 521, PERSON Gender: F Age: 38

SP ID: 898946 Appt Type: Primary Fasting

☐ Filled Comment  
☐ Not Filled Comment  
☐ (none)  
☐ blood present  
☐ contamination present

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	ID
196	Alb/Cr/UN 2	3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
197	Lytes 2	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
198	UrinIodine2	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
199	PeriTY/NIF2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
200	TSNAs 2	10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input type="radio"/> No			
201	Vol NA2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
202	Aro amine 2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
203	HAAhict 2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
204	Phyto/Caf2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
205	VOCs 2	1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			
206	Ca/Ox/Mg/P2	1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input type="radio"/> No			

## 9.3.3 Not Filling All Vessels

If you are not filling any vessels on the SP, right-click on the filled header to display the **Fill All** and **Not Filled All** choices (Exhibit 9-18). Click on **Not Filled All** and the response to **Filled** will be set to “No” for all vessels in the SP’s profile. The system will prompt you for a comment code before you can proceed with the exam.

Exhibit 9-18. Screen showing Comments column

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

**24 Hour Urine Process; Stand:615 Session:110966 01/05/2014 07:00 am - 07:30 am**

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/31/2013 Time: 02:24 PM

**Urine Processing**

Tech ID: 1756 Sample ID: 898946 Name: 521, PERSON Gender: F Age: 38  
 SP ID: 898946 Appt Type: Primary

Fill All  
 Not Filled All

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	Container ID	Slot#
183	Alb/Cr/UN 1		3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
184	Lytes 1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
185	Urintodine1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
186	Per/TY/NIF1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
187	TSNAs 1		10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input checked="" type="radio"/> No			
188	Vol NA 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
189	Aro amine 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
190	HAA/nit 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
191	Phyto/Caf1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
192	VOCs 1		1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			
193	Ca/Ox/Mg/P1		1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No			

2 of 3

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 03:07 PM

Start 24 Hour Urine Process Coordinator Console NHANES - Lab Vessel Pri... 24 Hour Urine 3:08 PM

The entire **Filled** column was populated to “No,” once the **Not Fill All** choice was selected (Exhibit 9-19).

Exhibit 9-19. Filled column indicating “No.”

**24 Hour Urine Process**

File View Utilities Reports Shipping Window Help

**24 Hour Urine Process: Stand:615 Session:110966 01/05/2014 07:00 am - 07:30 am**

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/31/2013 Time: 02:24 PM

**Urine Processing**

Tech ID: 1411		Sample ID: 898946		Name: 521, PERSON		Gender: F		Age: 38	
		SP ID: 898946		Appt Type: Primary		Fasting Req: 2			

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Comments	Container ID	Slot#
183	Alb/Cr/UN 1		3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
184	Lytes 1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
185	Urintodine1		2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
186	Per/TY/NIF1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
187	TSNAs 1		10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
188	Vol NA 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
189	Aro amine 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
190	HAA/nit 1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
191	Phyto/Caf1		5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
192	VOCs 1		1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		
193	Ca/Ox/Mg/P1		1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No	(none)		

2 of 3

End of Section Close Exam Finish

Ready MEC Layer: 4/8/2013 Application: 14.0.0 Not connected to Coordinator 03:08 PM

Start 24 Hour Urine Process Coordinator Console NHANES - Lab Vessel Pri... 24 Hour Urine 3:09 PM

To add comments to **Not Filled** vessels, click on the down arrow next under the comment column for the vessels you wish to add a comment to and select the appropriate comment (Exhibit 9-20). It is possible to add the same comment for all vessels by right-clicking on the Comment column and selecting **Not Filled** comments and picking the appropriate comment.

Exhibit 9-20. Adding comments to **Not Filled** vessels

SP ID: 898946 Name: 521, PERSON Age: 38 years Gender: Female Date: 12/30/2013 Time: 06:50 PM

Urine Processing

Tech ID: 1756 Sample ID: 898946 Name: 521, PERSON Gender: F Age: 38  
 SP ID: 898946 Appt Type: Primary Fasting Req: 2

Vessel ID	Test Name	CAP	Sample Volume	Type	Vessel Volume	Vessel Name	Filled	Not Filled Comment
196	Alb/Cr/UN 2	3.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
197	Lytes 2	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
198	Uriniodine2	2.0	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
199	Per/TY/NF2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
200	TSNAs 2	10.0	U	10 ml	VWR Screwcap	<input type="radio"/> Yes <input checked="" type="radio"/> No		
201	Vol NA 2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
202	Aro amine 2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
203	HAA/mict 2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
204	Phyto/Caf2	5.0	U	5 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
205	VOCs 2	1.8	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		
206	Ca/Ox/Mg/P2	1.5	U	2 ml	Nalge Cryovial	<input type="radio"/> Yes <input checked="" type="radio"/> No		

(none)  
 contamination present  
 Contamination, foreign matter  
 laboratory error  
 quantity not sufficient

### 9.3.4 Container Verification

Use Container Content Verification to verify the contents of each container and that the correct vessels are in the correct position within each container.

- Access to container verification is located under the shipping tab from the lab's heads up display (Exhibit 9-21).
- Perform container verification after each session.



**Exhibit 9-21. Container Contact Verification menu under Shipping tab**

SP ID	Sample ID	Status	Type	Gender	Name	UC	U	P	CB	B	GTT	PC	F	M	OR
329869	329869	BE	P	F		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
386827	386827	BE	P	M		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
416714	416714	BE	P	M	39 BAILEY, ANTHONY J	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
499508	499508	SC	P	M	30 DEEGAN, MARK	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
545182	545182	CI	P	M	11 POWELL, AALIYAH H	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
849425	849425	BE	P	F	12 CAMPBELL, VINNIE N	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
919919	919919	BE	P	M	22 PAYNE, IMA L	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Ready | HUP: idle | MEC Layer: 4/8/2013 | Application: 13.5.0 | Connected to Coordinator | 11:10 AM

To use the Container Content Verification application, remove a container from the freezer, using the barcode gun scan the Sample ID or the Astro ID of the first vessel to be verified. If correct vessel is scanned in, the sample ID will be displayed in green (Exhibit 9-22) .

The container Content Verification includes the Container ID, Container size, Name of container, Vessel ID, Vessel name, Last filled slot number, Vessel Priority number, and the number of unverified vessels remaining.

- This screen displays an indicator for whether the filter is opened or closed.
- Save and Next button saves your work and opens the container that is next in the list.
- To save your work and exit the application, use the OK button.
- To cancel your current work and exit the application, use the Cancel button.

Exhibit 9-22. Container Content Verification screen and indicators

Lab Subsystem: Stand:615 Session:615810 11/15/2010 08:30 am - 12:30 pm

File View Utilities Quality Control Reports Modules Shipping Window Help

SP ID Sample ID Status Type Gender Age Name Process Status HPV

Lab Container Content Verification

Container Id	Size	Name	Vessel ID	Vessel Name	Last Filled	Priority	Unverified
615782	5x5	5 inch box	54	VOC Blood	5	10	4
615768	9x9	2 inch box	1	PbCdHgSeMn	5	15	3
615769	10x10	2 inch box	3	RBC Folate	7	20	5
615770	9x9	2 inch box	4	Glycohem	6	30	4
615771	9x9	2 inch box	5	Mercury	4	35	3
615787	9x9	2 inch box	88	Acrylamide	2	40	1
615799	9x9	3 inch box	155	Fluoride	1	45	1

Filter on Container:  
☒ Opened  
☐ Closed

Save and Next

Container ID: 615782 Type: 5 inch box  
 Test(s): VOC Blood

	416714054			

OK Cancel

Ready HUP: idle MEC Layer: 4/8/2013 Application: 13.5.0 Connected to Coordinator 11:12 AM

If an incorrect vessel is scanned the following will happen (Exhibit 9-23):

- The sample number will be highlighted in blue; this allows the user to rescan the correct vessel without deleting the incorrect number.
- A pop-up box will be displayed indicating the correct contents of that slot.

Exhibit 9-23. Screen indicating incorrect vessel was scanned

Lab Subsystem: Stand:615 Session:615810 11/15/2010 08:30 am - 12:30 pm - [Lab Container Content Verification]

File View Utilities Quality Control Reports Modules Shipping Window Help

Container Id	Size	Name	Vessel ID	Vessel Name	Last Filled	Priority	Unverified
615770	9x9	2 inch box	4	Glycohem	6	30	4
615771	9x9	2 inch box	5	Mercury	4	35	3
615787	9x9	2 inch box	88	Acrylamide	2	40	1
615799	9x9	3 inch box	155	Fluoride	1	45	1
615772	9x9	2 inch box	9	Glucose	5	50	5
615791	9x9	2 inch box	136	Se/Cu/Zn	4	53	4
615788	10x10	2 inch box	110	Folate 1	4	58	4

Filter on Container:  
☒ Opened  
☐ Closed

Save and Next

Container ID: 615791 Type: 2 inch box  
 Test(s): Se/Cu/Zn

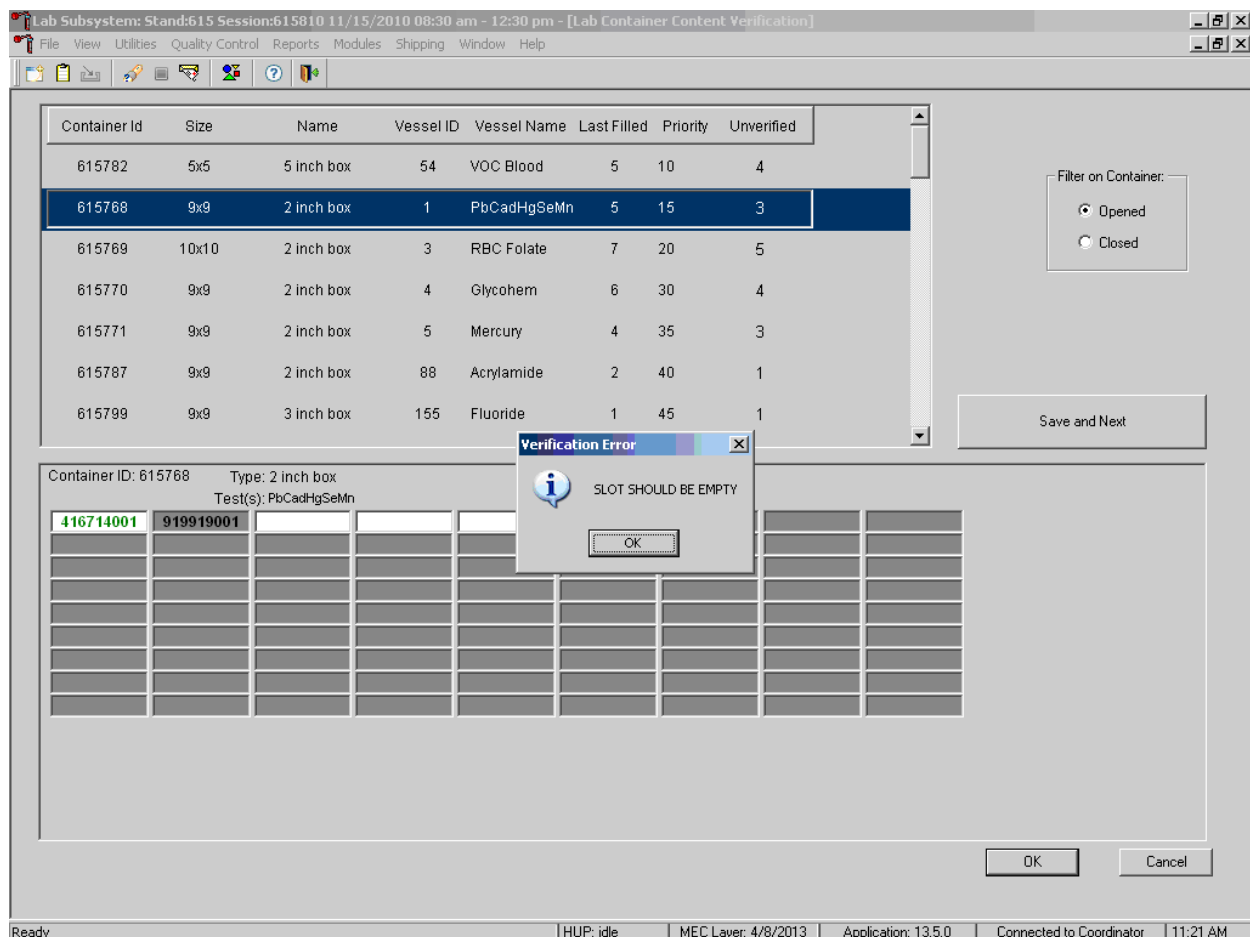
919919005	919919136							

OK Cancel

Ready | HUP: idle | MEC Layer: 4/8/2013 | Application: 13.5.0 | Connected to Coordinator | 11:19 AM

The following screenshot (Exhibit 9-24) shows a vessel that requires a red cap insert and an incorrect vessel side by side. The red cap insert is identified with a red outline around the box of the vessel, whereas the incorrect specimen number is highlighted in blue with red shading underneath.



**Exhibit 9-25. Screen showing verification error—slot should be empty**

To save your verification, you must press the Save and Next button or **OK** button. If you hit the cancel button, your last scanned vessel will not be saved.

- The enter key is the same as hitting the **OK** button on the pop-up boxes.
- The enter key is the same as hitting the **OK** box on the verification screen. It will save your work and exit you from the verification screen.

### List of 24-Hour Urine Lab Tests

This table (Exhibit 9-26) displays the list of lab tests, the first and second collection vessel numbers, the volume required in each vessel, the vessel type, container type, testing lab information, and ship to lab information.

**Exhibit 9-26. List of urine lab tests, vessel numbers and type, and other key information**

NHANES 24-Hour Main Study								
Test	Vessel No	1st Collection Vessel No	2nd Collection Vessel No	Volume	Vessel type	Container Type	Testing Lab and Contact info	Ship To Lab
albumin/creatinine/urea nitrogen	45	183	196	3	5-mL cryovial	9x9 3 inch	University of Minnesota, Sue Kupscho 612-624-6153 Lab 16	University of Minnesota Lab 16
sodium,potassium,chloride	TBD	184	197	2	5-mL cryovial, sterile	9x9 3 inch	Christine Pfeiffer 770-488-7926, lab 54	CASPIR Lab 6
iodine	62	185	198	2	2-mL cryovial, sterile	9x9 2 inch	Kathleen Caldwell, 770-488-7990 lab 61	CASPIR Lab 6
fluoride, perchlorate, thiocyanate, and nitrate	102	186	199	5	5-mL cryovial	9x9 3 inch	Ben Blount 770-488-7894 Lab 62	CASPIR Lab 6
TSNA	156	187	200	10	10mL VWR screw cap	5x5 3inch	Yang Xia 770-488-4212 Lab 59	CASPIR Lab 6
Volatile nitrosamines	151	188	201	5	5-mL cryovial	9x9 3 inch	Tiffany Seyler 770-488-4527 Lab 59	CASPIR Lab 6
Aromatic Nitrosamines	152	189	202	5	5-mL cryovial	9x9 3 inch	Tiffany Seyler 770-488-4527 Lab 59	CASPIR Lab 6
HAA/Nicotine analogs	153	190	203	5	5-mL cryovial	9x9 3 inch	June Feng 770-488 - 7980/Yang Xia 770-488-4212 Lab 59	CASPIR Lab 6
phytoestrogens and caffeine metabolites	128	191	204	5	5-mL cryovial	9x9 3 inch	Christine Pfeiffer 770-488-7926 Lab 54	CASPIR Lab 6
VOCs	TBD	192	205	1.8	2-mL cryovial, sterile	9x9 2 inch	David Chambers 770-488-0185 Lab 62	CASPIR Lab 6

Exhibit 9-27 presents the vessel sheet for the Lab.

**Exhibit 9-27. Vessel sheet for the Lab**

Vessel ID	Test Name	Sample Volume	Vessel Type	Container Type
183/196	Alb/Creat/UN	3	5mL cryovial	9x9 3 inch
184/197	Na/K/Cl	2	5mL cryovial	9x9 3 inch
185/198	Iodine	2	2mL cryovial	9x9 2 inch
186/199	Perchlor/thio/nit/FI	5	5mL cryovial	9x9 3 inch
187/200	TSNA	10	10 mL screwcap	5x5 3 inch
188/201	Volatile NA	5	5mL cryovial	9x9 3 inch
189/202	Aromatic NA	5	5mL cryovial	9x9 3 inch
190/203	HAA/Nicotine	5	5mL cryovial	9x9 3 inch
191/204	Phyto/Caffeine	5	5mL cryovial	9x9 3 inch
192/205	VOCs	1.8	2mL cryovial	9x9 2 inch
193/206	Ca/Ox/Mg/Phos	3.0*	5mL cryovial	9x9 3 inch
194/207	Xtra Urine	5	5mL cryovial	9x9 3 inch
195/208	Xtra Urine	5	5mL cryovial	9x9 3 inch

\* This volume must be exactly 3.0mL. Pipette using the Eppendorf Research Pipette.

## 9.4 Laboratory Quality Control

Laboratory quality control (QC) is located under the utility tab of the urine processing screen.

### 9.4.1 Start of Stand QC

Start of stand QC (Exhibit 9-28) is to be done on the UMEC setup day at each stand. Clean the freezer and refrigerator; document this was completed by answering the result column with “Yes” or “No.” Document the weight of the 1000g weight and the 1000g + the 4000g weight. Put a checkmark next to the QC items to indicate they were completed. Insert a comment as needed.

Prior to performing the scale QC, level the scale. Make sure the bubble is in the center of the window.

Exhibit 9-28. Start of stand QC

QC Check	Done	Result	Comment
Freezer Cleaned?	<input type="checkbox"/>	(yes/no)	
Refrigerator cleaned?	<input checked="" type="checkbox"/>	(yes/no)	
Class 1 1000g weight (+/-10g)	<input checked="" type="checkbox"/>	enter weight	
Class 1 1000g + 4000g (+/-50g)	<input checked="" type="checkbox"/>	enter weight	

### 9.4.2 Daily QC

Daily QC should be completed by the technician scheduled at 8 a.m. (Exhibit 9-29) Document the room temperature, refrigerator and freezer temperatures in the result column. Disinfect laboratory counters and perform scale QC. Verify the scale is level before performing daily QC. Enter the weight in the result column for the 100g, 2000g, and 4000g weights daily. Place a checkmark in front of all QC items to indicate they were completed. Comment as necessary.



Exhibit 9-29. Screen for daily QC

QC Check	Done	Result	Comment
Lab room temp reading (17 to 25 degrees C)	<input type="checkbox"/>	degrees C	
Refrigerator temperature (2 to 8 degrees C)	<input type="checkbox"/>	degrees C	
Freezer temperature (-28 to -33 degrees C)	<input type="checkbox"/>	degrees C	
Disinfect Counters	<input type="checkbox"/>	(yes/no)	
Class 1 100g weight (+/-1g)	<input type="checkbox"/>	enter weight	
Class 1 2000g weight (+/-20g)	<input type="checkbox"/>	enter weight	
Class 1 4000g weight (+/-40g)	<input type="checkbox"/>	enter weight	

### 9.4.3 Weekly QC

Flush the eye wash for 5 minutes each week and document with a “Yes” or “No” to indicate if it was completed or not. Place a checkmark in front of all QC items to indicate they were completed. Comment as necessary (Exhibit 9-30).

Exhibit 9-30. Screen for weekly QC

QC Check	Done	Result	Comment
Flush eye wash for 5 min	<input type="checkbox"/>		

(yes/no)

OK Cancel

#### 9.4.4 End of Stand QC

At the end of each stand, on teardown day, clean the freezer and refrigerator . Document this was completed or not by entering yes or no in the result column (Exhibit 9-31). Place a checkmark in front of all QC items to indicate they were completed. Comment as necessary.

**Exhibit 9-31. End of stand QC tasks**

QC Check	Done	Result	Comment
Freezer Cleaned?	<input type="checkbox"/>	no (yes/no)	
Refrigerator cleaned?	<input checked="" type="checkbox"/>	no (yes/no)	

### 9.4.5 QC Pop-Up Message

If you have not performed the required QC, a pop-up box will be displayed on the screen. The message in this box says one or more of your QC checks has not been performed. Click OK to acknowledge the message and proceed to the QC.

# Printing Labels for 24-Hour Urine Vessels

10

## 10.1 Introduction

Labels are essential to the laboratory component. Labels support each sample person's (SP's) unique processing protocol. The laboratory record is created when the medical technologist accesses a session for the first time. This record forms the basis for each SP's data in the database. Container labels are generated and assigned to vessel storage containers and allow a processed sample to be tracked from mobile examination center (MEC) processing through contract laboratory receipt.

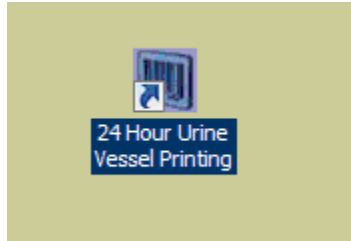
Biological specimens are shipped to a variety of contract laboratories in double-sided Styrofoam and corrugated cardboard shippers or hard-sided shippers with Styrofoam inserts using dry ice or wet ice (refrigerant packs). A copy of the shipping manifest is included with each shipment that contains a list of the items contained in the shipment and certain demographic information. Exhibit 8-1, the Blood and urine shipping protocol, illustrates the specifications for the shipment of blood and urine specimens to each contract laboratory.

Packages are shipped using FedEx. The medical technologist in station 1 is responsible for contacting FedEx at the start of each stand to determine availability. The facility and equipment specialist contacts the dry ice company at the start of each stand to establish a contact but the chief medical technologist arranges for the delivery of dry ice on shipping days. It is the chief medical technologist's responsibility to confirm the arrangements for shipping and dry ice delivery with the facility and the equipment specialist at the beginning of each stand.

The chief medical technologist works with the MEC manager and the home office to determine exactly which days to ship specimens to the contract laboratories. As a rule, you should pack and ship most specimens once a week during the MEC split examination sessions. Although all specimens should arrive at the destination the day after shipping, the next-day limitation may conflict with off days, holidays, and vacations. If a conflict occurs with the shipping schedule, working schedule, or the contract laboratory schedule, consult the MEC manager and the home office technical supervisor.

## 10.2 Print Vessel Labels Using the Label Print Application

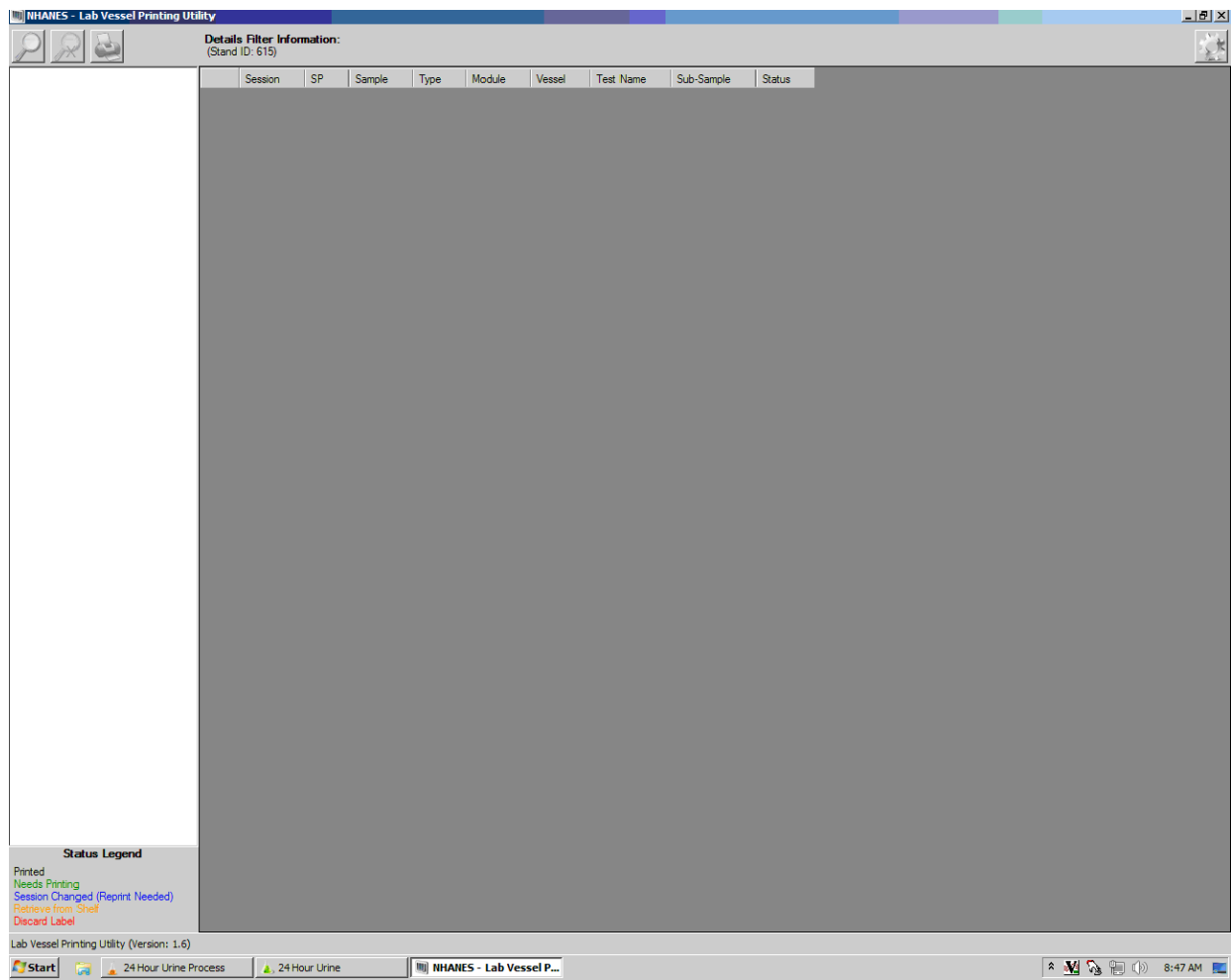
Open the Laboratory application. Log onto the computer terminal and select the Label Print Application. This application is found on the desktop of all laboratory computers and has an icon that looks like a barcode label.



## 10.3 Main Printing Screen

From the main printing screen, no SPs will be displayed on the left side of the screen. Select the magnifying glass to display the filter options (Exhibit 10-1).

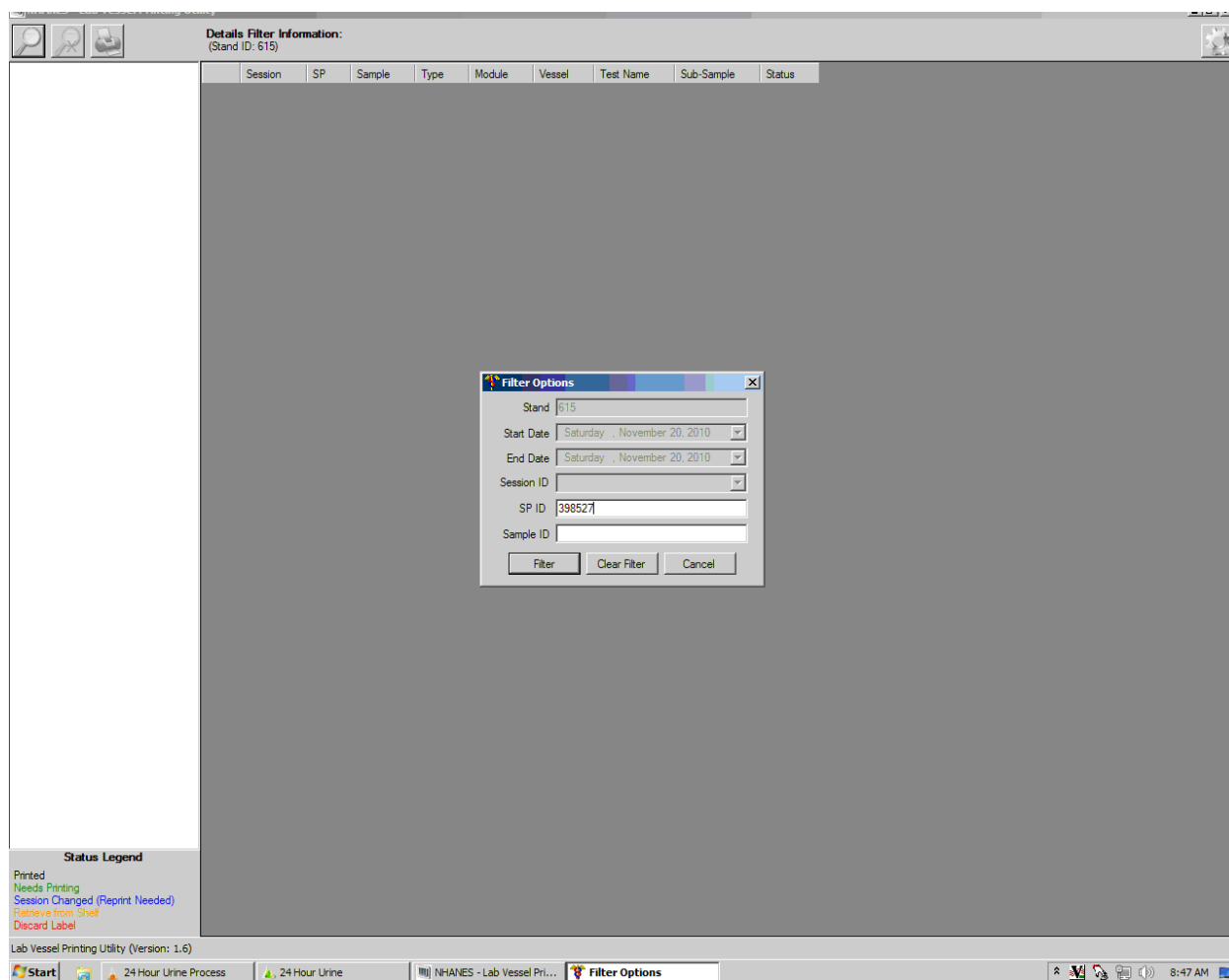
Exhibit 10-1. Main printing screen



## 10.4 Filter Options

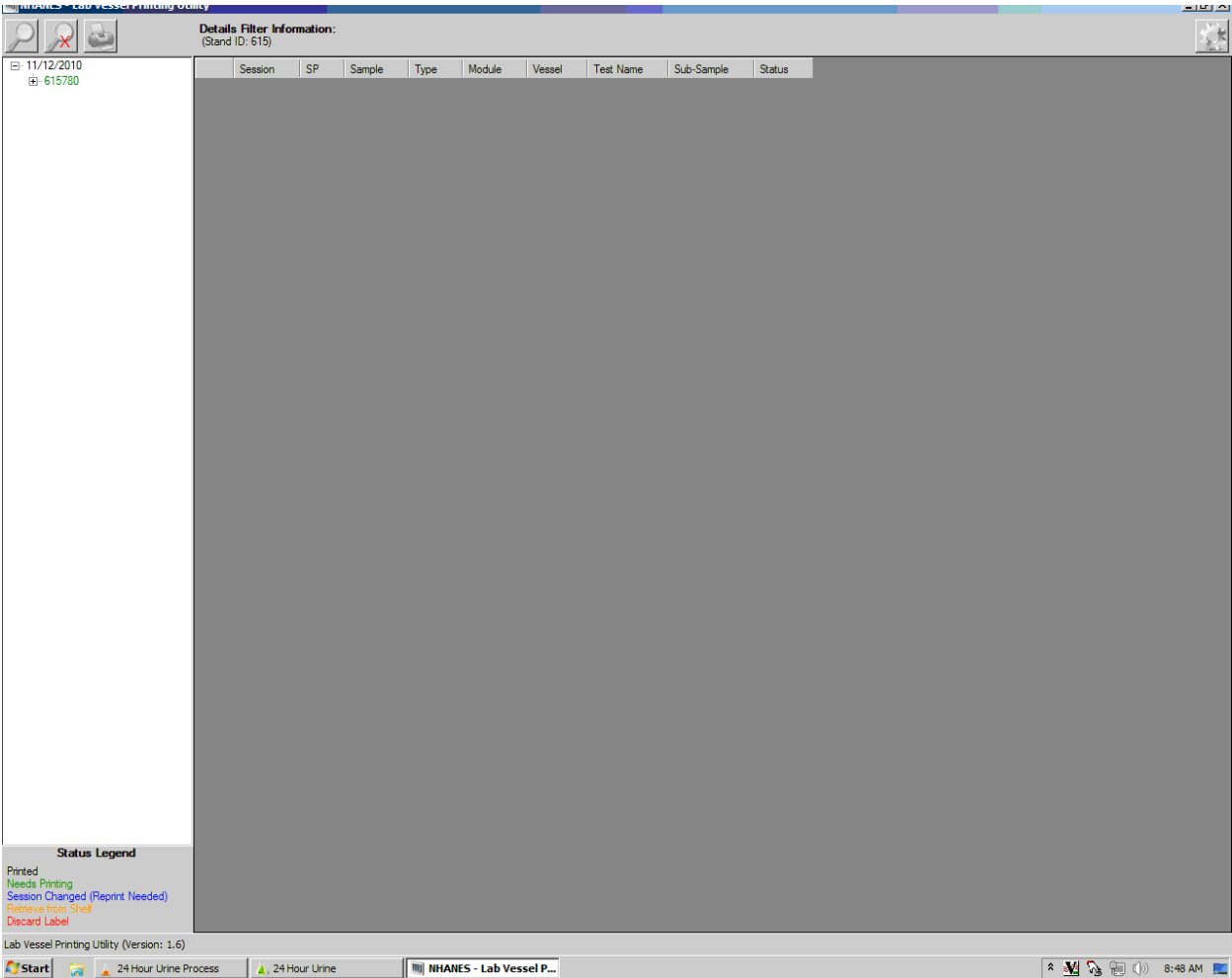
Type the SP ID in the SP ID line of the filter option screen and press **Enter**. This will bring up the date and the session the SP was scheduled for his or her MEC visit on the left-hand side in a tree view (Exhibit 10-2.)

Exhibit 10-2. Date and session SP scheduled for MEC visit



The sessions will be color coded to match the legend at the bottom left-hand side of the screen. Sessions in green indicate that a particular session or SPs within that session need to be printed, as in Exhibit 10-3. Sessions in black have already been printed and there are no SP profile changes. Sessions in blue indicate that an SP was added to that session or that an SP or SPs had a profile change and needed to be reprinted. If an SP is removed from a session, that session will be displayed in red, which indicates label action is needed.

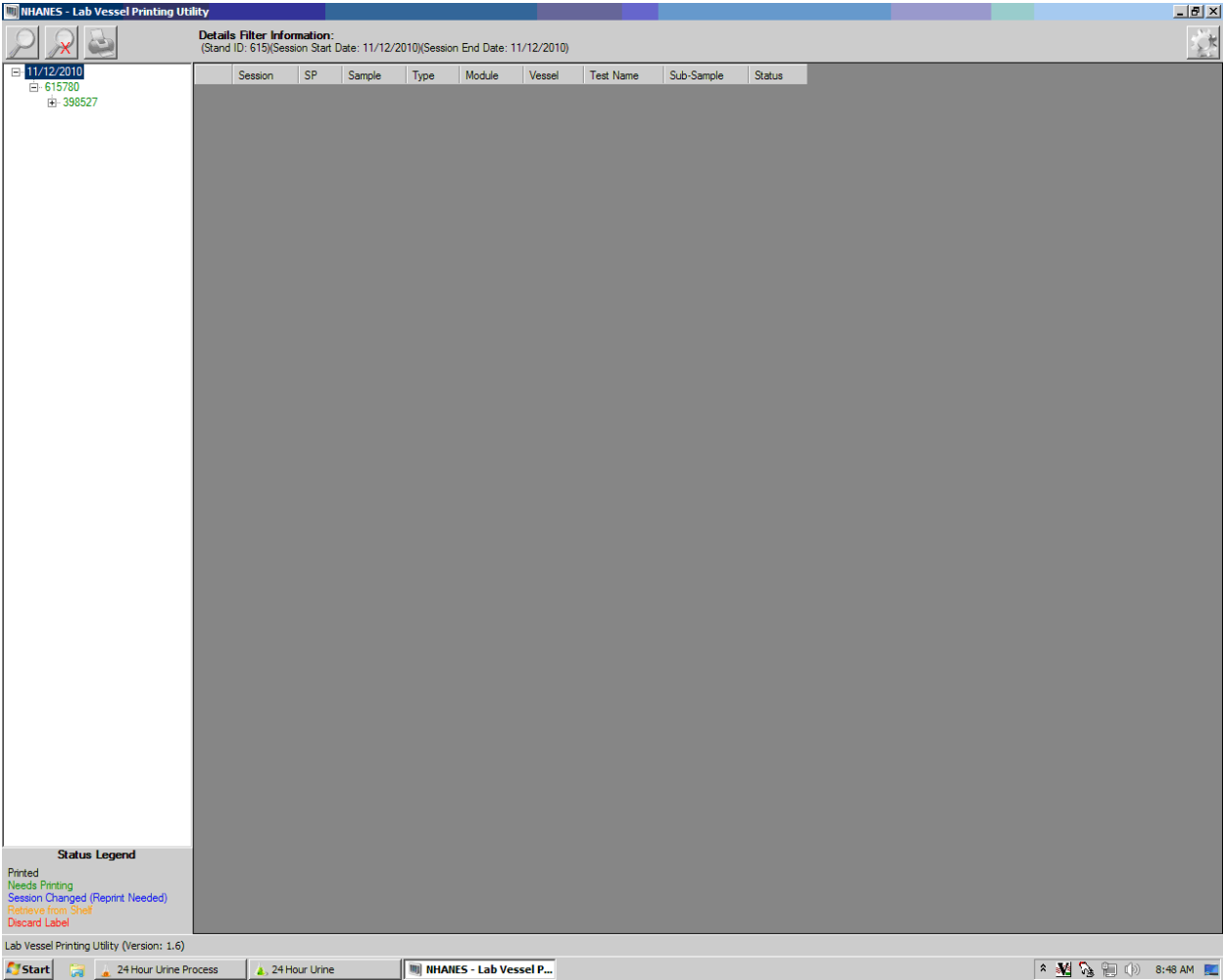
Exhibit 10-3. Color-coded session display



Expand the session, by clicking on the [+] next to the session number (Exhibit 10-4).



Exhibit 10-4. Example of expanded session



Click on the [+] next to the SP ID to display the vessels for this SP (Exhibit 10-5).

Exhibit 10-5. Display of vessels for this SP

NHANES - Lab Vessel Printing Utility

Details Filter Information:  
(Stand ID: 615)(Session Start Date: 9/22/2010)(Session End Date: 9/22/2010)(Session ID: 615271)(SP ID: 978106)

9/22/2010

615271

978106

Session	SP	Sample	Type	Module	Vessel	Test Name	Sub-Sample	Status
615271	978106	978106	U	24H	183	Alb/Cr/UN 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	184	Lytes 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	185	UrinIodine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	186	Per/TY/N/F1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	187	TSNAs 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	188	Vol NA 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	189	Aro amine 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	190	HAA/hict 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	191	Phyto/Caf1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	192	VOCs 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	193	Ca/Ox/Mg/P1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	194	Xtra Urine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	195	Xtra Urine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	196	Alb/Cr/UN 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	197	Lytes 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	198	UrinIodine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	199	Per/TY/N/F2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	200	TSNAs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	201	Vol NA 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	202	Aro amine 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	203	HAA/hict 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	204	Phyto/Caf2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	205	VOCs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	206	Ca/Ox/Mg/P2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	207	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	208	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing

Status Legend

Printed  
Needs Printing  
Session Changed (Reprint Needed)  
Retrieve from Shelf  
Discard Label

Lab Vessel Printing Utility (Version: 1.6)

Start

24 Hour Urine Process

24 Hour Urine

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8:53 AM



## 10.5.2 Printing Individual Labels

To print a single or individual label, highlight the line you wish to be printed (Exhibit 10-7). Use the printer icon to print using the print options.

**Exhibit 10-7. Screen showing highlighted label selected for printing**

**Details Filter Information:**  
(Stand ID: 615)(Session Start Date: 9/22/2010)(Session End Date: 9/22/2010)(Session ID: 615271)(SP ID: 978106)

Session	SP	Sample	Type	Module	Vessel	Test Name	Sub-Sample	Status
615271	978106	978106	U	24H	183	Ab/Cr/UN 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	184	Lytes 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	185	Urinodine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	186	Per/TY/N/F1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	187	TSNAs 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	188	Vol NA 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	189	Aro amine 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	190	HAA/nict 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	191	Phyto/Caf1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	192	VOCs 1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	193	Ca/Ox/Mg/P1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	194	Xtra Urine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	195	Xtra Urine1	24 Hour Urine Recruitment	Needs Printing
615271	978106	978106	U	24H	196	Ab/Cr/UN 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	197	Lytes 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	198	Urinodine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	199	Per/TY/N/F2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	200	TSNAs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	201	Vol NA 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	202	Aro amine 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	203	HAA/nict 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	204	Phyto/Caf2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	205	VOCs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	206	Ca/Ox/Mg/P2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	207	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	208	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing

**Status Legend**  
 Printed  
 Needs Printing  
 Session Changed (Reprint Needed)  
 Remove from Sheet  
 Discard Label

Lab Vessel Printing Utility (Version: 1.6)

Start | 24 Hour Urine Process | 24 Hour Urine | NHANES - Lab Vessel P... | 8:53 AM

Right click to display the print option (Exhibit 10-8). Only the selected label will print.

## Exhibit 10-8. Display of print options

Lab Vessel Printing Utility

Details Filter Information:  
(Stand ID: 615)(Session Start Date: 9/22/2010)(Session End Date: 9/22/2010)(Session ID: 615271)(SP ID: 978106)

9/22/2010  
615271  
978106

Session	SP	Sample	Type	Module	Vessel	Test Name	Sub-Sample	Status
615271	978106	978106	U	24H	183	Ab/Cr/UN 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	184	Lytes 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	185	Urinodine1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	186	Per/TY/N/F1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	187	TSNAs 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	188	Vol NA 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	189	Aro amine 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	190	HAA/nict 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	191	Phyto/Caf1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	192	VOCs 1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	193	Ca/Ox/Mg/P1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	194	Xtra Urine1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	195	Xtra Urine1	24 Hour Urine Recruitment	Printed
615271	978106	978106	U	24H	196	Ab/Cr/UN 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	197	Lytes 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	198	Urinodine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	199	Per/TY/N/F2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	200	TSNAs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	201	Vol NA 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	202	Aro amine 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	203	HAA/nict 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	204	Phyto/Caf2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	205	VOCs 2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	206	Ca/Ox/Mg/P2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	207	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing
615271	978106	978106	U	24H	208	Xtra Urine2	24 Hour Urine Second CollectionRecruitment	Needs Printing

Print  
Discard  
Discard All  
Retrieve Shelved Label  
Retrieve All Shelved Labels

Status Legend  
Printed  
Needs Printing  
Session Changed (Reprint Needed)  
Retrieve from Shelf  
Discard Label

Lab Vessel Printing Utility (Version: 1.6)

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Once the labels have been printed, the color will change from green to black. Black indicates that the labels have been printed, where green indicates the labels need to be printed. If labels are black, but you need to print, change the print option from “Needed” to “All.” This will allow you to print already printed labels.

# Shipping Procedures for 24-Hour Urine



## 11.1 Create New Container Labels

Store processed vessels and biological samples in boxes and bags (containers). Print and assign container labels using the **Create New Container Labels** module. Once a label has been created, the container is designated as “open” in the database; it is available for slot assignments as vessels are marked as filled.

At the beginning of each stand, print and assign one new container ID for each vessel using either the **Print** module or the **Shipping** module. Print additional labels as needed. Each stand is allocated a maximum of 999 labels. The actual container label will include the vessel name, vessel ID, the size of the container (9x9 2-inch box, etc.), and the container number, as shown in these examples.

Chlam/GC (46)  
5x5 3 inch box



410529

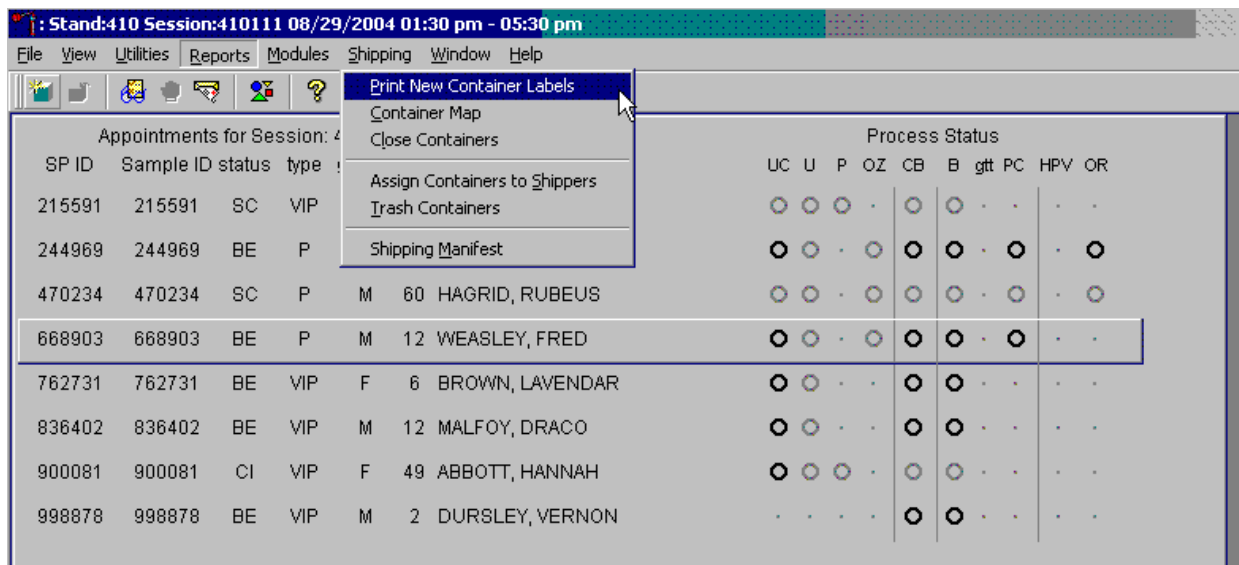
Prior Pest (48)  
5x5 3 inch box



410530

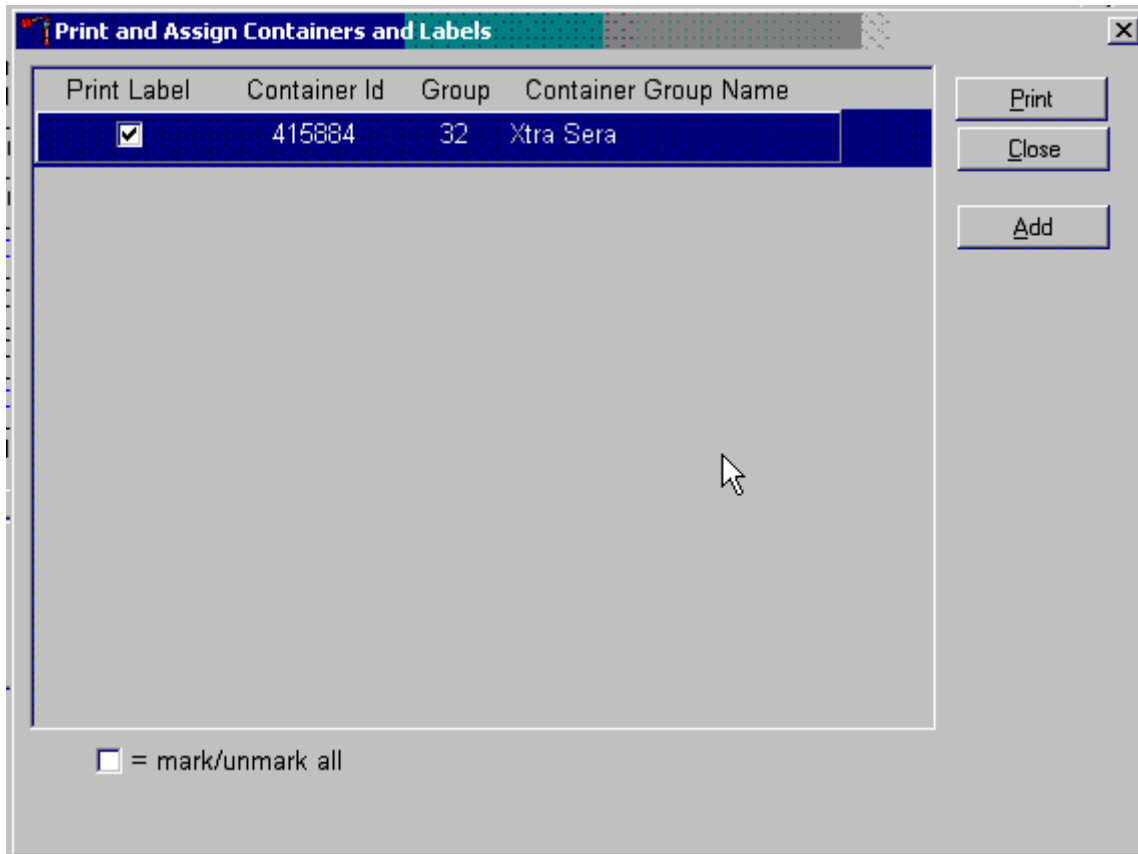
Use the shipping module within the laboratory application to print and assign new container ID numbers or labels (Exhibit 11-1).

**Exhibit 11-1. Print and assign new container ID numbers using the Shipping module.**



When a container is full, the container will automatically “close” and the Print and Assign Containers and Labels window opens with that vessel displayed and the checkmark prefilled. Alternatively, open a new container to replace the closed container by using the Print and Assign Containers and Labels window (Exhibit 11-2).

Exhibit 11-2. Print and assign containers and labels



When a container is full, an opportunity to open a new container is automatically displayed on the “Print and Assign Container and Labels” window. Repeat the process of marking the checkbox and selecting the “Print” button.

## 11.2 Reprinting Container Labels from the Container Map Screen

In the Container map screen, an option to reprint the container label has been added. Right-click anywhere in the line of the container whose label you wish to reprint, so it's highlighted. Click on the task “Reprint Label” and remove the label from the Dymo Printer (Exhibit 11-3).



**Exhibit 11-3. Reprinting container labels**

Stand:430 Session:430040 12/07/2004 08:30 am - 12:30 pm - [View Container Maps]

File View Utilities Reports Modules Shipping Window Help

Container Id	Size	Name	Vessel ID	Vessel Name	Last Filled	Priority
417013	5x5	5 inch box	cs	6	1	
417024	9x9	2 inch box	1	Lead/Cad/HG	2	15
417025	10x10	2 inch box	3	RBC Folate	2	20
417026	9x9	2 inch box	4	Glycohem	2	30
417027	9x9	2 inch box	5	Mercury	2	35

Filter on Container:

☒ Opened

☐ Closed

Container ID: 417013 Type: 5 inch box

Vessel ID: 119 Test(s): Genetics

0	0	974475	974475	965340
965340	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

Show Container By:

☐ Slot Number

☒ Sample ID

☐ Household ID

**11.3 Shipping Overview**

The integrity of laboratory specimens is critical to NHANES. Storage temperatures have been established for each analyte in consultation with the National Center for Health Statistics (NCHS) and contract laboratories. It is critical to maintain these established conditions throughout specimen storage and shipping and until their ultimate receipt by the contract laboratories. Maintain these conditions by using documented procedures, which include using sufficient dry ice, and sending specimens by FedEx priority overnight.

FedEx Priority Overnight guarantees next-business-day delivery by 10:30 a.m. to most U.S. addresses and by noon, 4:30 p.m., or 5 p.m. in remote areas. Delivery by FedEx can be delayed due to a weekend or holiday. This extraordinary circumstance usually occurs at the end of a stand or just

before vacation. In any case, ship all specimens before vacations. The following actions are intended to mitigate unforeseen delay:

- Consider using medium shippers instead of small shippers for all laboratories east of the Mississippi when shipping from areas west of the Mississippi, and for all laboratories west of the Mississippi when shipping from areas east of the Mississippi. Substitute a larger shipper when shipping specimens in extreme summer heat or whenever professional judgment dictates added precautions.
- Use dry ice in blocks instead of pellets since blocks sublime at a slower rate.

The shipping technologist is primarily responsible for packing and shipping the specimens to various contract laboratories on a designated day. As necessary, other medical technologists assist in performing each of the steps listed below to complete the shipping procedures.

Prior to the next stand, the laboratory staff creates address labels with the current MEC address to use on the Class 9 labels. Place the current MEC address label in the lower left of the Class 9 label and place the appropriate Lab label in the lower right of the Class 9 label. Trim both labels to fit in the space, so they don't cover up any information. Prepare Class 9 labels with the MEC address and Lab address for each shipping week.

Shipping procedures:

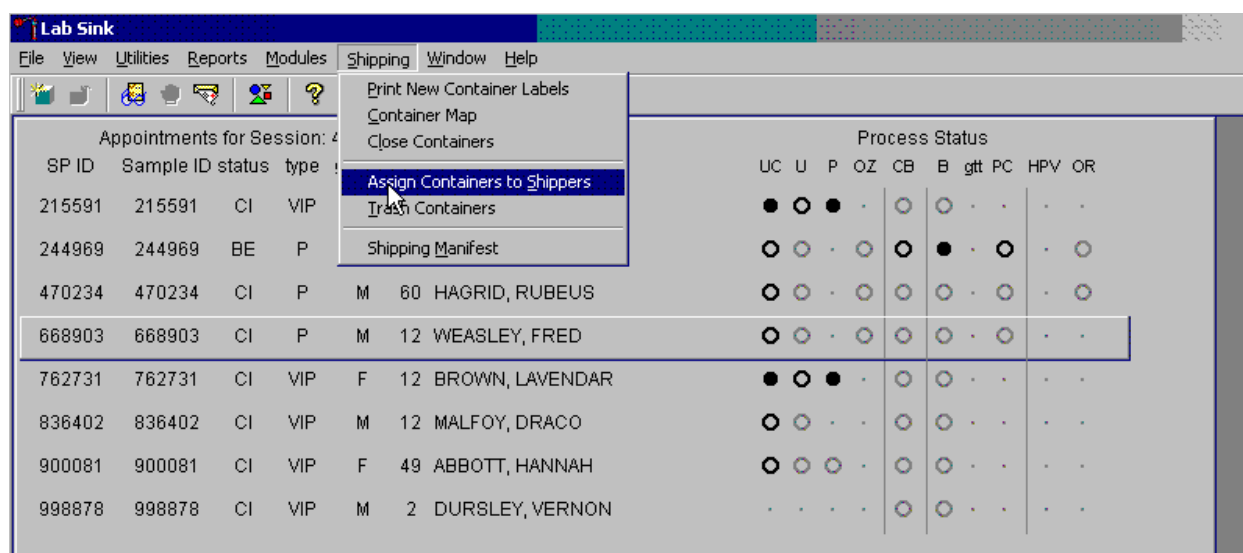
- On the day before or the morning of a designated shipping day, create and print shipper labels (airbills) using FedEx Ship Manager.
- Prepare the Class 9 labels for shipments that use dry ice.
- On the morning of a shipping day, close all containers, assign containers to a shipper, print the paper shipping manifest for each shipper, and open all new containers.
- Assemble the paper shipping manifest, prepared FedEx label, FedEx preprinted return airbills, and assorted "warning" labels for each shipper. Clip all materials together until ready to pack the shippers.
- Collect the shippers from the compartments under the MEC.
- Pack the shippers with the containers, absorbent material, newsprint (padding), plastic bags, and a sufficient supply of dry ice as appropriate.
- Place the appropriate paper manifest and the preprinted FedEx return airbill in a 9 x 12 plastic bag and place the plastic bag on top of the Styrofoam shipper lid.
- Label each shipper with the appropriate FedEx label and warning labels.

- When the contract laboratory personnel receive the shippers, they unpack the specimens and return the shippers to the warehouse.

## 11.4 Assign Containers to Shippers

Assign closed containers to or associate closed containers with a specific airbill. To associate a specific closed container to the airbill for that laboratory, use the Assign Container to Shippers module (Exhibit 11-4).

**Exhibit 11-4. Access the Assign Containers to Shippers module**



To access the Assign Containers to Shippers module, use the mouse to direct the mouse arrow to **Shipping** in the top menu bar, left click, drag the mouse arrow to **Assign Container to Shippers**, and left-click or type [Alt] [S/s], [S/s].

The Assign Containers to Shippers window displays (Exhibit 11-5).

**Exhibit 11-5. Assign containers to shippers window**

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
129	Johns Hopkins Viral Oncology	67	HPV Rinse	435318	
125	Esoterix Clinical Trials Services	66	HLA-B27	435768	
122	CDC/NCID Hepatitis Ref Lab	2	HAV	435225	
22	CDC/NCID AIDS Division	3	HIV	435189	
54	CDC/NCEH Air Toxicant Branch	4	VOC Blood	435200	
46	CDC/NCID NCHSTD	5	Chlam	435195	
1	CASPIR		Lead/Cad/Hg	435178	
3	CASPIR		RBC Folate	435179	

Container ID: 435767 Type: 2 inch box  
Vessel ID: 70 Test(s): Vitamin D

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81

Status: assigned ☐ NOT assigned ☒ both ☐

Frequency: weekly ☒ non-weekly ☐ twice weekly ☐ all ☐

OK Cancel

This left side of the screen includes columns for a group designation (which represents a number), Type of container, Lab designation, Test Name(s), Container ID number, and Airbill Number. The container line within the rectangular box is the active container. The right side of the screen displays the corresponding container map for the active container. The left side of the bottom of the window contains three “Status” filters (radio buttons): “assigned,” “NOT assigned,” and “both.” Beneath the status filters are “Frequency” filters (radio buttons): “weekly,” “non-weekly,” “twice weekly,” and “all.” Use the column titles to sort the rows. To sort the rows, use the mouse to direct the mouse arrow to the desired column title and left-click. The window updates based on the selection.

Enter an airbill number into each Airbill Number text box. There are three ways to enter the airbill number.

- Use the barcode gun to scan the barcode from the FedEx Ship Manager airbill. The barcode is located in the bottom of the top half of the folded airbill. It is the tallest on the airbill. Hold the gun in the right hand, squeeze the trigger, and move the gun up and down to adjust the laser light so that it covers the width of the barcode. Once the gun successfully scans the barcode, an audible beep is emitted.
- Use the barcode gun to scan the barcode on the second page (Recipient’s Copy) of the two-part Form ID 0215. This barcode is located on the lower left-hand side toward the bottom of the form. Hold the gun in the right hand, squeeze the trigger, and move the gun up and down to adjust the laser light so that it covers the width of the barcode. Once the gun successfully scans the barcode, an audible beep is emitted.

- Use the keyboard keys to type the airbill number from either the FedEx Ship Manager airbill or the FedEx airbill form 0215.

To assign a container to the corresponding airbill:

- Set the Status filter to: “NOT assigned.”
- Set the Frequency to: weekly, non-weekly, or both, depending on the shipping situation.

To select the Status filter, use the mouse to direct the mouse arrow to the “assigned,” “NOT assigned,” or “both,” radio button and left click. To select the shipping Frequency, use the mouse to direct the mouse arrow to weekly, non-weekly, twice weekly, or all, and left-click (Exhibit 11-6).

**Exhibit 11-6. Set the Status and Frequency filters**

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
129	Johns Hopkins Viral Oncology	67	HPV Rinse	435318	
125	Esoterix Clinical Trials Services	66	HLA-B27	435768	
122	CDC/NCID Hepatitis Ref Lab	2	HAV	435225	
22	CDC/NCID AIDS Division	3	HIV	435189	
54	CDC/NCEH Air Toxicant Branch	4	VOC Blood	435200	
46	CDC/NCID NCHSTD	5	Chlam	435195	
1	CASPIR		Lead/Cad/Hg	435178	
3	CASPIR		RBC Folate	435179	

Status: ☐ assigned ☒ NOT assigned ☐ both

Frequency: ☒ weekly ☐ non-weekly ☐ twice weekly ☐ all

Container ID: 435787 Type: 2 inch box  
Vessel ID: 70 Test(s): Vitamin D

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81

OK Cancel

To sort the rows by lab name, use the mouse to direct the mouse arrow to the top header “Lab Name” and left -lick. All containers associated with a specific lab will be grouped together in ascending order (Exhibit 11-7).

**Exhibit 11-7. Sort the rows by Lab Name**

**Assign Containers to Shippers**

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
70	CASPIR		Vitamin D	435767	
126	CASPIR		PAH HB	435769	
1	CASPIR		Lead/Cad/Hg	435178	
3	CASPIR		RBC Folate	435179	
106	CASPIR		RBC Folt	435219	
5	CASPIR		Mercury	435181	
109	CASPIR		PUFA/TFA	435220	
88	CASPIR		Acrylamide	435211	

Container ID: 435767 Type: 2 inch box  
Vessel ID: 70 Test(s): Vitamin D

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81

Status: assigned ☐ NOT assigned ☒ both ☐

Frequency: weekly ☒ non-weekly ☐ twice weekly ☐ all ☐

OK Cancel

To enter the airbill number into the Airbill Number text box, place the cursor in the first Airbill Number text box (Exhibit 11-8). Use the barcode gun to scan the airbill number. The scanned number contains 20 extra digits. The actual 12-digit airbill number is embedded in the 32-digit scanned number. Select the Tab key to move to the next text box. Do not select the Tab key until the application has been allowed to enter the entire number into the text box. Once the Tab key is selected, the program edits the first airbill number to delete the extra numbers (Exhibit 11-9).

**Exhibit 11-8. Enter the airbill number into the Airbill Number text box**

**Assign Containers to Shippers**

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
70	CASPIR		Vitamin D	435767	79564329876587466789098767656787
126	CASPIR		PAH HB	435769	
1	CASPIR		Lead/Cad/Hg	435178	
3	CASPIR		RBC Folate	435179	
106	CASPIR		RBC Folt	435219	
5	CASPIR		Mercury	435181	
109	CASPIR		PUFA/TFA	435220	
88	CASPIR		Acrylamide	435211	

Container ID: 435767 Type: 2 inch box  
Vessel ID: 70 Test(s): Vitamin D

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81

Status: assigned ☐ NOT assigned ☒ both ☐

Frequency: weekly ☒ non-weekly ☐ twice weekly ☐ all ☐

OK Cancel

Exhibit 11-9. Edited airbill numbers

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
22	CDC/NCID AIDS Division	3	HIV	435189	796170389796
16	CDC/NCID DASH	64	MMRV	435766	796170389754
14	CDC/NCID Hepatitis Ref Lab	2	Hep Profile	435185	796170388765
122	CDC/NCID Hepatitis Ref Lab	2	HAV	435225	796179388765
46	CDC/NCID NCHSTD	5	Chlam	435195	796170378790
18	Collaborative Laboratory Services	40	Biochem	435187	
24	Emory University	9	HSV	435191	
125	Esoterix Clinical Trials Services	66	HLA-B27	435768	

Container ID: 435187    Type: 2 inch box  
Vessel ID: 18    Test(s): Biochem

Status: assigned ☐ NOT assigned ☒ both ☐  
Frequency: weekly ☒ non-weekly ☐ twice weekly ☐ all ☐

OK Cancel

Continue scanning the barcodes and selecting the Tab key until all closed containers are assigned to airbills.

Complete the assignment process.

To record the assignment of containers to shippers, use the mouse to direct the mouse arrow to the “OK” button and left-click (Exhibit 11-10). **This step is required to save the information.** To exit the **Assign Containers to Shippers** module without recording any assignments, use the mouse to direct the mouse arrow to the “Cancel” button and left-click.

Exhibit 11-10. Record the assignment of containers to shippers

**Assign Containers to Shippers**

Grp.	Lab Name	Lab	Test Name(s)	ID #	Airbill Number
22	CDC/NCID AIDS Division	3	HIV	435189	796170389796
16	CDC/NCID DASH	64	MMRV	435766	796170389754
14	CDC/NCID Hepatitis Ref Lab	2	Hep Profile	435185	796170388765
122	CDC/NCID Hepatitis Ref Lab	2	HAV	435225	796179388765
46	CDC/NCID NCHSTD	5	Chlam	435195	796170378790
18	Collaborative Laboratory Services	40	Biochem	435187	796170654345
24	Emory University	9	HSV	435191	796179656765
125	Esoterix Clinical Trials Services	66	HLA-B27	435768	796179097545

Container ID: 435768    Type: 2 inch box  
Vessel ID: 125    Test(s): HLA-B27

1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81

Status: ☐ assigned ☒ NOT assigned ☐ both

Frequency: ☒ weekly ☐ non-weekly ☐ twice weekly ☐ all

OK Cancel

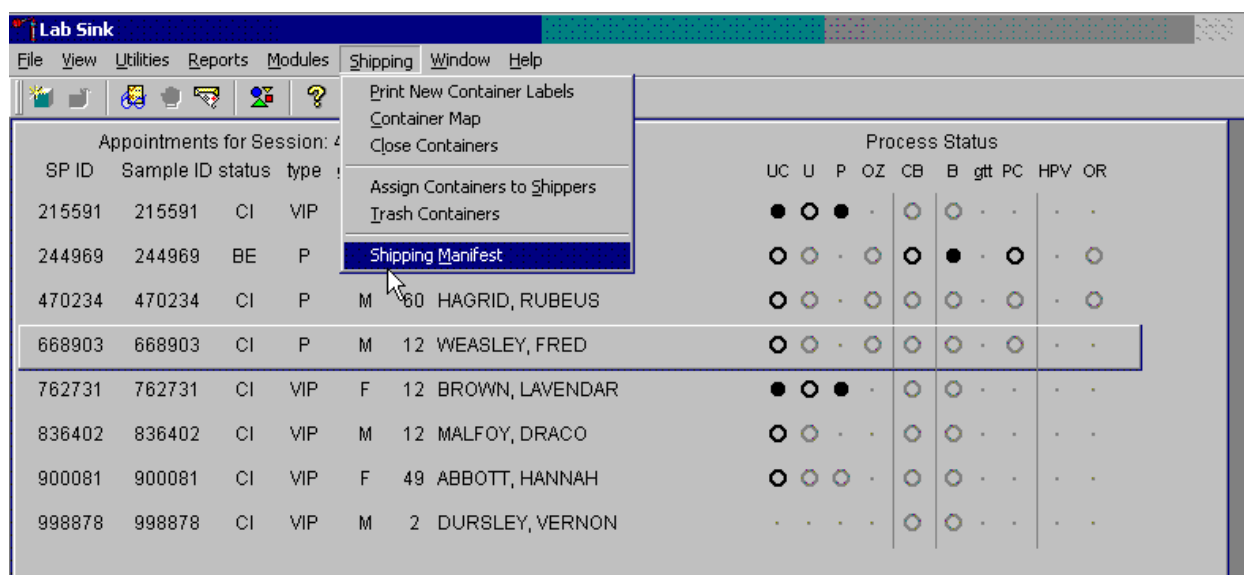
## 11.5 Create Shipping Manifests

Each shipper must include a paper manifest, which lists the inventory of the specimens in the shipping boxes. In addition, each laboratory receives an identical electronic file. Follow the steps listed below to prepare the paper manifest and to send the electronic file.

To access the **Shipping Manifest** module (Exhibit 11-11, use the mouse to direct the mouse arrow to **Shipping** in the top menu bar, left click, drag the mouse arrow to **Shipping Manifest**, and left-click or type [Alt] [R/r], [M/m].



Exhibit 11-11. Access to the Shipping Manifest module



A Shipping Manifest window (exhibit 11-12) displays either after the Shipping Manifest module is accessed or after a positive response is recorded to the IC Informed Consent Exclusion window.

The upper portion of the Shipping Manifest Report contains two filters (Unprocessed and Previously Processed) and one row for each airbill assigned in the Assign Container to Shipper module. The row includes a Mark for Processing checkbox, the Airbill Number, Shipment Date, and Ship to Lab ID, and one checkbox to mark or unmark all airbills.

The lower portion of the window includes the Shipment ID or airbill number, Shipment Date, Lab Name, Lab ID number, Address, Contact personnel, Survey Year, Container ID associated with the Shipment ID, Container Size, Container Type, Test(s) associated with the container, and a list by Slot ID of the Sample/Vessel ID, Astro ID, and Date Collected.

Exhibit 11-12. Shipping Manifest Window

**Shipping Manifest**

Filter: ☒ Unprocessed ☐ Previously Processed

Mark for Processing	Airbill Number	Shipment Date	Ship to Lab
<input type="checkbox"/>	796170388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input type="checkbox"/>	796179388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input type="checkbox"/>	796170389796	12/11/2008	CDC/NCID AIDS Division (3)

☐ = mark/unmark all

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**National Health and Nutrition Examination Survey**  
 National Center for Health Statistics  
 3311 Toledo Road, Rm 4323  
 Hyattsville, Maryland 20782

**Shipping Manifest Report**

Shipment ID: 796170388765 Survey Year: 2007  
 Shipment Date: 12/11/2008

Lab Name: CDC/NCID Hepatitis Ref Lab Lab ID: 2  
 Address: 1600 Clifton Road Bldg 18 Floor 3 Rm 218 MS A33 Atlanta, GA 30329  
 Contact: Annemarie Wasley  
 Phone: (404)639-3103  
 E-Mail:

Container Id	Size	Type	Test(s)	Hep Profile
435185	9x9	2 inch box		

Slot Id	Sample/Vessel Id	Astro Id	Date Collected	Age Group
1	184869014	000OKW0A	10/20/2008	2
2	312716014	000OKWVS	12/9/2008	2
3	244969014	000OKWBP	12/10/2008	2

Select one of the filters (Exhibit 11-13). Set the filter to “Unprocessed” to print manifests and generate email files for shipments created but not previously processed using this module. Set the filter to “Previously Processed” to reprint an airbill or to recreate an electronic file for shipments previously processed using this module. To filter on unprocessed airbills, use the mouse to direct the mouse arrow to the “Unprocessed” radio button and left click. To filter on previously processed airbills, use the mouse to direct the mouse arrow to the “Previously Processed” radio button and left click.

Exhibit 11-13. Select filters

**Shipping Manifest**

Filter: ☒ Unprocessed ☐ Previously Processed

Mark for Processing	Airbill Number	Shipment Date	Ship to Lab
<input type="checkbox"/>	796170388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input type="checkbox"/>	796179388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input type="checkbox"/>	796170389796	12/11/2008	CDC/NCID AIDS Division (3)

☐ = mark/unmark all

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**Shipping Manifest Report**

Shipment ID: 796170388765 Survey Year: 2007  
 Shipment Date: 12/11/2008

Lab Name: CDC/NCID Hepatitis Ref Lab Lab ID: 2  
 Address: 1600 Clifton Road  
 Bldg 18 Floor 3 Rm 218 MS A33  
 Atlanta, GA 30329  
 Contact: Annemarie Wasley  
 Phone: (404)639-3103  
 E-Mail:

Container Id: 435185	Size: 9x9	Type: 2 inch box	Test(s):	Hep Profile
Slot Id	Sample/Vessel Id	Astro Id	Date Collected	Age Group
1	184869014	000OKW0A	10/20/2008	2
2	312716014	000OKWVS	12/9/2008	2
3	244969014	000OKWBP	12/10/2008	2

Select one or more manifests by placing a checkmark in the Mark for Processing checkboxes (Exhibit 11-14).

To select or mark one manifest for printing and email, use the mouse to direct the mouse arrow to the checkbox and left click. Repeat this process to include other airbills. Use the scroll bar to display all existing airbills. The lower portion of the window updates to display only marked airbills.

Exhibit 11-14. Selecting one or more manifest in the mark for Processing checkboxes

**Shipping Manifest**

Filter: ☒ Unprocessed ☐ Previously Processed

Mark for Processing	Airbill Number	Shipment Date	Ship to Lab
<input checked="" type="checkbox"/>	796170388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input checked="" type="checkbox"/>	796179388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input type="checkbox"/>	796170389796	12/11/2008	CDC/NCID AIDS Division (3)

☐ = mark/unmark all

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**Shipping Manifest Report**

Shipment ID: 796170388765 Survey Year: 2007  
 Shipment Date: 12/11/2008

Lab Name: CDC/NCID Hepatitis Ref Lab Lab ID: 2  
 Address: 1600 Clifton Road  
 Bldg 18 Floor 3 Rm 218 MS A33  
 Atlanta, GA 30329  
 Contact: Annemarie Wasley  
 Phone: (404)639-3103  
 E-Mail:

Container Id: 435185	Size: 9x9	Type: 2 inch box	Test(s):	Hep Profile
Slot Id	Sample/Vessel Id	Astro Id	Date Collected	Age Group
1	184869014	000OKW0A	10/20/2008	2
2	312716014	000OKWVS	12/9/2008	2
3	244969014	000OKWBP	12/10/2008	2

To collectively mark all the airbills, use the mouse to direct the mouse arrow to the mark/unmark all checkbox and left-click (Exhibit 11-15). To collectively unmark all the airbills, use the mouse to direct the mouse arrow to the mark/unmark all checkbox and left-click a second time. The lower portion of the screen will update to display the marked airbills.

Exhibit 11-15. Collectively mark or unmark all the airbills

**Shipping Manifest**

Filter: ☒ Unprocessed ☐ Previously Processed

Mark for Processing	Airbill Number	Shipment Date	Ship to Lab
<input checked="" type="checkbox"/>	796170388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input checked="" type="checkbox"/>	796179388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input checked="" type="checkbox"/>	796170389796	12/11/2008	CDC/NCID AIDS Division (3)

☒ = mark/unmark all

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**Shipping Manifest Report**

Shipment ID: 796170388765 Survey Year: 2007  
 Shipment Date: 12/11/2008

Lab Name: CDC/NCID Hepatitis Ref Lab	Lab ID: 2
Address: 1600 Clifton Road Bldg 18 Floor 3 Rm 218 MS A33 Atlanta, GA 30329	Contact: Annemarie Wasley Phone: (404)639-3103 E-Mail:

Container Id: 435185	Size: 9x9	Type: 2 inch box	Test(s):	Hep Profile
Slot Id	Sample/Vessel Id	Astro Id	Date Collected	Age Group
1	184869014	000OKW0A	10/20/2008	2
2	312716014	000OKWVS	12/9/2008	2
3	244969014	000OKWBP	12/10/2008	2

The right side of the window includes two buttons: Process and Close. Process the shipping manifests using the “Process” button (Exhibit 11-16).

Selecting the “Process” button will generate and print the Shipping Manifest Report(s). To print the manifests, use the mouse to direct the mouse arrow to the Process button and left-click, or type [Shift] [P/p]. To exit the module without printing the manifest, use the mouse to direct the mouse arrow to the “Close” button and left-click, or type [Shift] [C/c].

Exhibit 11-16. Processing the shipping manifesto

**Shipping Manifest**

Filter: ☒ Unprocessed ☐ Previously Processed

Mark for Processing	Airbill Number	Shipment Date	Ship to Lab
<input checked="" type="checkbox"/>	796170388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input checked="" type="checkbox"/>	796179388765	12/11/2008	CDC/NCID Hepatitis Ref Lab (2)
<input checked="" type="checkbox"/>	796170389796	12/11/2008	CDC/NCID AIDS Division (3)

☒ = mark/unmark all

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**Shipping Manifest Report**

Shipment ID: 796170388765 Survey Year: 2007  
 Shipment Date: 12/11/2008

Lab Name: CDC/NCID Hepatitis Ref Lab	Lab ID: 2
Address: 1600 Clifton Road Bldg 18 Floor 3 Rm 218 MS A33 Atlanta, GA 30329	Contact: Annemarie Wasley Phone: (404)639-3103 E-Mail:

Container Id: 435185	Size: 9x9	Type: 2 inch box	Test(s):	Hep Profile
Slot Id	Sample/Vessel Id	Astro Id	Date Collected	Age Group
1	184869014	000OKW0A	10/20/2008	2
2	312716014	000OKWVS	12/9/2008	2
3	244969014	000OKWBP	12/10/2008	2

## 11.6 Packing Procedure for the Shippers

Most of the shipments require dry ice to keep the specimens frozen during shipment. It is the chief medical technologist's responsibility to arrange for delivery of dry ice pellets or blocks for shipping specimens. Use sliced blocks whenever possible since these sublime less than pellets. Well in advance of a scheduled shipment, the shipping technologist estimates how much dry ice to order for the shipment and informs the MEC manager. Store the dry ice in extra shipping containers. When handling dry ice, wear cryo gloves to avoid burning hands. Also, wear an eye shield when filling bags with ice chips or breaking blocks into chunks. Use the scale to ensure that each shipper has the required amount of dry ice.

Federal regulations require packaging all blood, urine, and other liquid diagnostic specimens according to certain regulations and packaging procedures. Diagnostic specimens must be packed in good quality packaging, which must be strong enough to withstand the shocks and loading normally encountered during transport, including trans-shipment between transport units and warehouses as well as removal from a pallet or overpack for subsequent manual or mechanical handling. Packaging must be constructed and closed to prevent any loss of contents when prepared for transport, which might be caused under normal conditions of transport, by vibration, or by changes in temperature, humidity, or pressure.

The packaging must consist of three components:

1. A primary receptacle(s);
2. A secondary packaging; and
3. A rigid outer packaging.

Primary receptacles must be packed in secondary packaging in such a way that, under normal conditions of transport, they cannot break, be punctured, or leak their contents into secondary packaging. Secondary packaging must be secured in outer packaging with suitable cushioning material. Any leakage of the contents must not substantially impair the protection properties of the cushioning material or of the outer packaging.

Packages must be prepared as follows:

**650(a) For Liquids:**

- The primary receptacle(s) must be leakproof and must not contain more than 1 L;
- The secondary packaging must be leakproof;
- If multiple fragile primary receptacles are placed in a single secondary packaging, they must be individually wrapped or separated to prevent contact between them;
- Absorbent material must be placed between the primary receptacle and the secondary packaging. The absorbent material, such as cotton wool, must be in sufficient quantity to absorb the entire contents of the primary receptacle (so that any release of the liquid substance will not compromise the integrity of the cushioning material or of the outer packaging;

- The primary receptacle or the secondary packaging must be capable of withstanding, without leakage, an internal pressure producing a pressure differential of not less than 95 kPa in the range of -40°C to +55°C (-40°F to 130°F); and
- The outer packaging must not contain more than 4 L.

### **Specific Requirements—Refrigerated or Frozen Specimens: Ice, Dry Ice, and Liquid Nitrogen**

When dry ice or liquid nitrogen is used to keep specimens cold, all applicable requirements of these Regulations must be met. When used, ice or dry ice must be placed outside the secondary packaging or in the outer packaging or an overpack. Interior supports must be provided to secure the secondary packaging in the original position after the ice or dry ice (solid carbon dioxide) has been dissipated. If ice is used, the packaging or overpack must be leakproof. If dry ice (solid carbon dioxide) is used, the outside packaging or overpack must be designed and constructed to permit the release of carbon dioxide gas to prevent a buildup of pressure that could rupture the packaging.

The primary receptacle and the secondary packaging must maintain their integrity at the temperature of the refrigerant used as well as the temperatures and the pressures, which could result if refrigeration were to be lost.

Infectious substances assigned to UN 3373 that are packed and marked in accordance with this packing instruction are not subject to any other requirement of these regulations except for the following:

- a. The name, address, and telephone number of a responsible person must be provided on the waybill or on the package.

### **Packing Instruction 904—Dry Ice**

Dry ice (solid carbon dioxide), when offered for transport by air, must be in packaging designed and constructed to permit the release of carbon dioxide gas and to prevent a buildup of pressure that could rupture the packaging.

The net weight of dry ice must be marked on the outside of the package.



Arrangements between the shipper and operator(s) must be made for each shipment to ensure that ventilation and safety procedures are followed.

When a Shipper's Declaration is not required, the following information as required by 8.2.3 for dry ice (solid carbon dioxide) must be contained in the "Nature and Quantity of Dangerous Goods" box on the air waybill:

- Proper shipping name (**Dry Ice** or **Carbon Dioxide, solid**);
- UN 1845;
- The number of packages; and
- The net weight of dry ice in each package.

The net weight of the dry ice must be marked on the outside of the package.

## 11.7 Pack Medium Shipping Containers for Frozen Shipment

Pack the specimen storage boxes tightly in the Styrofoam container to prevent movement.

- Place the shipper on the scale and tare.
- Place a layer 3-inches thick or at least 15 pounds of chipped dry ice or dry ice slabs in the bottom of a medium Styrofoam shipper.
- Place the sealed pressure vessels containing the boxes on top of the dry ice.
- Place enough chipped dry ice or dry ice slabs on top so that the Styrofoam container is filled with dry ice to 1/4" below the rim or add a minimum of another 15 pounds of dry ice.
- Place the Styrofoam lid on top of the Styrofoam bottom.
- Place a plastic envelope containing the appropriate shipping manifest and return preprinted label on top of the Styrofoam lid.
- Weigh the shipper on the scale or assume the medium shipper weighs approximately 35 pounds.
- Record the weight of the dry ice (30 pounds for a medium shipper) on the FedEx Class 9 label.
- Secure the shipper with tape.

- Attach the airbill.

## 11.8 Pack Small Shipping Containers for Frozen Shipment

Pack the specimen storage boxes tightly in the Styrofoam container to prevent movement.

- Place the shipper on the scale and tare.
- Place a layer 3” thick or at least 10 pounds of chipped dry ice or dry ice slabs in the bottom of a medium Styrofoam shipper.
- Place the sealed pressure vessels containing the boxes on top of the dry ice.
- Pack the sides with crumbled newsprint.
- Place enough chipped dry ice or dry ice slabs on top so that the Styrofoam container is filled with dry ice to 1/4” below the rim or add a minimum of another 10 pounds of dry ice.
- Place the Styrofoam lid on top of the Styrofoam bottom.
- Place a plastic envelope containing the appropriate shipping manifest and return preprinted label on top of the Styrofoam lid.
- Weigh the shipper on the scale or assume the small shipper weighs approximately 25 pounds.
- Record the weight of the dry ice (20 pounds for a small shipper) on the FedEx Class 9 label.
- Secure the shipper with tape.
- Attach the airbill.

## 11.9 Label Shippers

For all destinations, include a preprinted FedEx return airbill containing the warehouse address.

All shippers must contain a FedEx barcode label and appropriate orientation and warning labels. Label all shippers with the appropriate warning labels as follows:

1. A “Keep Frozen” label and a FedEx Class 9 – Miscellaneous Dangerous Goods label on shippers containing dry ice.
2. A “Refrigerate” label on shippers containing refrigerant packs.
3. A UN 3373: - “BIOLOGICAL SUBSTANCE, CATEGORY B label on all shippers.
4. An “overpack” label on all shippers.
5. Complete the section of the FedEx label that requests the weight of the contents of the shipper, and if applicable, the section that requests the weight of the dry ice contained in the shipper.
6. Place the FedEx label with the appropriate contract laboratory address in a plastic FedEx pouch and attach the window to the cardboard lid of the shipper.
7. Add one additional strip of tape across the FedEx pouch.

# Inventory and Teardown Procedures

# 12

## 12.1 General Procedures

- Since item units can change, verify the “unit of measure” each time you record a count. Examples of units are pack, each, bag, box, case, roll, tray, bottle, pair, and pouch.
- Do not redefine or re-iterate the Unit of Measure.
- “PAR Level” represents the number of units the component is to begin a stand with. Note that PAR Levels are set and adjusted by home component staff only. Any/all recommendations to adjust an item’s PAR level should be directed to Home Component Staff.
- Do not write any notes, comments, etc., on the Start-of-Stand Inventory Count Sheets or the End-of-Stand Inventory Count Sheets. Comments or concerns should be written on a separate sheet of paper and attached to the inventory sheet.
- Rotate items by first using items you have in the rooms, then items in the belly compartment. Place items you just received in the back of the stock, unless you need them immediately. Only restock your rooms with items that were just shipped to the stand when you are out of that item in your room. Many items such as gloves, alcohol prep pads, sani-cloth wipes, blood tubes, etc. deteriorate over time. Always use inventory with the closest expiration date first.
- Multiple inventory items onboard the MEC contain lot numbers and expiration dates. When performing physical inventory counts, pay close attention to these items and mark inventory sheets accordingly for each lot number/expiration date per item.
- Do not purchase items listed on the inventory sheets. Every item listed on the inventory sheet is supplied by the NHANES Warehouse. Purchasing items locally creates chaos with the Inventory Management System.
- Do not borrow items from other components. Any additional inventory needed by a component should be requested from the NHANES Warehouse. Inventory usage is tracked by component. The “Counted By” tech id is entered into the database to track inconsistencies and trends. Everyone is accountable for his or her component counts.

## 12.2 End of Stand Inventory Procedures

The End-of Stand Inventory Count Sheet (EOSCS) includes the stand number, Site ID (MEC number), a “Counted By” line, and Exam Supply columns for item number, general item description, Unit designation, PAR level, and a Count box. The MEC Manager prints these EOSCSs for every component. The MEC staff is responsible for accurately counting (inventorying) exam supplies and entering this number into the Count box. The MEC staff gives the completed sheets back to the MEC Manager who sends them to the Warehouse Manager. The Warehouse Manager enters the item counts into the Inventory Management System.

- Print only one name in the “Counted By” field. This is the person responsible for taking and verifying the inventory count.
- Please write legibly for all counts.
- Place a number in each “Count” box. Do not leave any count box empty. If there is no stock remaining for a specific item, place a “zero” in the count box.
- Do not count partial units; record only whole numbers in the “Count” box. Do not write entries such as: ½, partial, some, many, a few, couple, .5, or multiple.
- If the PAR for an item is more than one (1) and the “unit of measure” is open, do not count that container. Only count the remaining number of items that have not been opened.
- If the PAR for an item is only one (1) unit and it is more than ½ empty, place a zero (0) in the count box. A full unit will be supplied to the component at the opening of the next site.
- All active lot numbers and expiration dates are listed on the inventory count sheets if they are applicable for that item. Record the number of supplies remaining for each lot number/expiration date in the count box. If there is no inventory remaining for a listed lot number/expiration date, then place a “zero” in the count box.
- Any item that has expired during the MEC site or will expire before the MEC re-opens at its next location should be removed from the component. If an item is removed, a “zero” should be entered in the count box on the End-of-Stand Inventory Count Sheet for that item. A Delete/Expired Inventory Count Sheet must be filled out, per component, showing the quantity for each item removed from the component. This additional inventory sheet must be attached to the End-of-Stand Inventory Count Sheet for that component when turned into the MEC Manager.

## 12.3 Mid-Stand Inventory Procedures

Mid-Stand Inventory is performed by each component on the MEC. The Mid-Stand Inventory is performed approximately 2-2 ½ weeks into an operating site. This inventory provides the opportunity for MEC Staff to request additional supplies from the warehouse that will be needed to complete the current MEC Site. The Mid-Stand Inventory is conducted via UFO entry (per component). Please note: the mid-stand inventory is only to provide additional supplies needed to complete the current site, it is not designed to bring all supplies up to full par level.

- Each component is to review all remaining inventory to determine if additional supplies are needed to complete the current MEC site.
- A “UFO” will be entered (sighted) by one MEC Staff member per component.
- MEC Staff will enter a “UFO” by component name and then use “Inventory/Supplies” for the type of UFO entry.
- In the description field, the MEC Staff member will request the supply(s) needed for the component
- Entries are to be made as: item description then quantity requested (per item)
- If no additional supplies are needed for the component, then the entry “Nothing Needed” is to be written in the description field.
- Do not request items in the UFO that are not currently on the component inventory list.
- Do not request changes to set par levels in mid-stand UFO’s.
- Do not enter equipment issues in a UFO listed as “Inventory/Supplies”
- All completed UFO entries will be reviewed by the MEC Manager for that MEC before the warehouse will pull and ship supplies requested.
- Once the supplies have been pulled by the warehouse and packed for shipping to the MEC, the Warehouse Manager will finalize the UFO.
- Mid-Stand deliveries are arranged between the MEC Manager and the Warehouse Manager

### ***Start of Stand Inventory Procedures***

The Start-of-Stand Pull Sheets (SOSPS) include the stand number, Site ID (MEC number), and Exam Supply columns for part number, general item description, Previous EOS Count number, PAR level, Unit designation, and a Ship to Stand box. The Warehouse Manager uses this report to bring each item back to par level. For example, if the Previous EOS Count (captured by the IMS) is four and the Par level is five, the Ship to Stand count box will contain the number one. The Warehouse Manager prints and packs one SOSPS for each component. The MEC staff is responsible for accurately reconciling the supplies and numbers in the SOSPS. The MEC staff gives the completed sheets back to the MEC Manager who returns them to the Warehouse Manager. The Warehouse Manager reviews each sheet and sends additional supplies to the field if necessary.

- Reconcile the inventory for each item.
- Verify the Previous EOS Count for each item.
- Verify that the start of stand shipment contains the exact number of each item listed in the Ship to Stand box.
- Previous EOS Count added to the Ship to Stand Count Box should equal PAR Level.
- If the total inventory equals the set PAR level, place a checkmark on the right side of the Ship to Stand Count Box (per item).
- If there is a discrepancy, write the physical count on hand to the right of the Ship to Stand Count box (per item).
- If the quantity for an item is higher than the set PAR level, the excess should be removed from the component (leaving PAR) and returned to the warehouse. If an item(s) is being returned to the warehouse, have the MEC Manager print a “Transfer Inventory to Warehouse Count Sheet” for the component. Print your name on the inventory sheet. Mark only the quantities for item(s) that are being returned. Give the excess inventory along with the “Transfer Inventory Sheet” to the MEC Manager to ship supplies back to the warehouse.

### ***Consumables vs. Non-Consumables***

Inventory items are divided into two categories—consumable and non-consumable. Inventory both types of items during each inventory. The definition for a consumable item is anything that is typically consumed during an examination. A non-consumable item is one that can be used more than once (*example: stopwatches, test tube racks, safety glasses, storage boxes, etc*). There are times when non-

consumable items will need to be replaced. These instances would include items that are used in an emergency, when the item expires, or when the item breaks (*example: physician medical kit supplies, stopwatches, thermometers, CPR masks, etc.*).

### ***Shipping Excess Inventory Back to the Warehouse***

When shipping excess inventory back to the warehouse, please use the “Transfer Inventory to Warehouse Manifest” which is found on the IntraWeb and can be printed by the MEC Manager. This form looks similar to the “End of Stand Count Sheets.” Print your name in the “Count By” field and mark only the items (with quantity being returned) in the count boxes that are being shipped back to the warehouse. Give the items to be returned along with the “Transfer Inventory to Warehouse Inventory Sheet” to the MEC Manager to ship back to the warehouse. This information is entered into the Inventory Management System by the Warehouse Manager and is used to adjust the stand inventory and usage information as well as increase the warehouse inventory counts.

### ***Tracking of Expired and Broken Inventory***

Complete the “Delete Expired/Broken Inventory Report” whenever inventory has expired and must be destroyed or has broken and is no longer usable. Print your name in the “Count By” field and mark only the item (s) that have expired or broken in the count box that are being removed from the MEC. This report is found on the IntraWeb and should be completed and forwarded to the Warehouse Manager so that the expired or broken inventory can be removed from the stand inventory. Unless the item is tool (piece of equipment), under most circumstances the item can be disposed of there in the field and there is no need to return the item to the warehouse. Check with MEC Manager or call Warehouse Manager to verify the need to ship the expired/broken item back to the warehouse.



***Always Remember To Take Your Time When Counting Inventory !!!!!!!***

***UMEC Teardown Procedures***

- Do End of Stand Inventory.

Laboratory:

- Do End of Stand QC.
- Clean refrigerator and freezer.
- Take thermometers out of refrigerator and freezer – replace solid cap, wrap thermometer and put in original box.
- Take room temp thermometer off cabinet and put in original box.
- Wrap all beakers in bubble wrap, place in box on the floor preferably in the cut out for your knees in the lab.
- Pack phone, printers, barcode wands/readers and put cover over monitor and keyboard. Strap keyboard and monitor down with a bungee cord.
- Strap refrigerator with a ratcheted tie down.
- Remove anything from the cupboards that could break during transit.
- Lock all cabinet doors.

Exam Rooms:

- Pack phone, printers, barcode wands/readers and put cover over monitor and keyboard. Strap keyboard and monitor down with a bungee cord.
- Place all office supplies in a drawer or cabinet.
- Put all loose handouts in a locked drawer or cabinet.
- Lock all cabinet drawers and doors.

Storage Room:

- Everything must be packed and placed on the floor.

Reception Area:

- Pack phone, printers, barcode wands/readers and put cover over monitor and keyboard. Strap keyboard and monitor down with a bungee cord.
- Place all office supplies in a drawer or cabinet.
- Put all loose handouts in a locked drawer or cabinet.
- Lock all cabinet drawers and doors.

Petty Cash:

- Take remaining cash to the bank and get money orders for that amount.
- Send the money orders back to Maureen McTighe.
- A separate procedure will follow.

Cell Phone—remember to take this to the next stand.

## Exhibit 12-1. 24-hour urine start of stand pull sheet

## 24 Hour Urine Start of Stand Pull Sheet

Stand 323  
Consumable

Site ID: MEC 3

Part #	Description	Previous EOS Count	Par	Unit	Ship to Stand
<b>EXAM SUPPLIES</b>					
ABS 3x3	Absorbent Sheets (3" x 3")		1	pack	
14-666-301	Bench Kote Paper - 46" x 57" Paper for Lab Counte		2	pack	
S0-Bleach	Bleach - Regular - 5 - 5.25 Hydrochloride, Fragra		1	gallon	
1441266	Bleach Right Disinfecting Spray - 32 Ounce Spray Bottle		2	bottle	
S-16727	Cardboard Filler Box - 5" x 5" x 8" Brown Box		3	bundle	
487960	Commode Collection Top Hat - 27 Ounce, White		1	case	
23-751610	Deionized Water - 1 Gallon Plastic Bottle		3	gallon	
	Lot: 300768 Exp DT: 02/28/2016				
	Lot: 306250 Exp DT: 03/31/2016				
	Lot: 323137 Exp DT: 03/31/2016				
	Lot: 326986 Exp DT: 05/31/2016				
	Lot: 350250 Exp DT: 06/30/2016				
	Lot: 359166 Exp DT: 08/31/2016				
	Lot: 369533 Exp DT: 09/30/2016				
761282	Gloves, Sterling Nitrile Large - Gray Glove, 100 pairs per box		3	box	
747112	Gloves, Sterling Nitrile Medium - Gray Glove, 100 pairs per box		3	box	
747113	Gloves, Sterling Nitrile Small - Gray Glove, 100 pairs per box		3	box	
GOJ-9639 12CT	Handsoap-Waterless (Purrell) -		3	bottle	
10033740	Large Travel Tote - Insulated Cooler Bag, Blue or		5	case	
23-100-125	Sani-Cloth Towelettes - Individual Wipe		14	pack	
06-66997	Towelettes, Sani-Cloth (Cleaner)		2	bottle	
13 711 36	Transfer Pipette (15mL ,8.0 Bulb Clear) - 250 per box		3	box	
86.1171	Transfer Pipette (3.5 clear, plastic)		2	box	
111134	Travel Cooler Bag - Black, Zipper Bag		1	case	
14-375-248	Urine Collection Container - 3 Liter, Amber w/ Cap Adjusted		11	case	
	Lot: 1108541 Exp DT: 12/31/2050				
03-528B	U-Tek Refrigerant Ice Pack - 12 Ounce		20	case	
15-235-61	Wipes, Terri (23" x 11")		2	box	
62-28	Zip Lock (Mini-Grip) - Red Line, 9" x 12"		1	pack	
274-20H	Zip Lock Bag - 4mil 12" x 15"		4	pack	

Exhibit 12-1. 24-hour urine start of stand pull sheet (continued)

Part #	Description	Previous EOS Count	Par	Unit	Ship to Stand
<b>OFFICE SUPPLIES</b>					
107708	Dymo Costar Label (1" x 2 1/8") - 500 labels per roll		3	box	
SAN 25010	Highlighter, Blue		2	each	
SAN 25009	Highlighter, Pink		2	each	
SAN 25025	Highlighter, Yellow		2	each	
AVE 5165	Label - Full Sheet 8.5" x 11" - Lab Label		1	box	
31155	Labels, Zebra (1" x 2.625", clear) - Black Bar Added		2	roll	
HEWQ2610A	Laser Printer Toner Cartridge - HP2300dn - Do Not Count		1	each	
	Whats In The Prin				
37001	Magic Marker - Ultra Fine Sharpie - Black		3	each	
SAN 30001	Magic Markers - Sharpie - Fine Point Black		4	each	
95.954	Magic Markers, Felt Tip Fine Line (Waterproof)		10	each	
UNV72220BX	Paper Clip, Jumbo		1	box	
ACC 72380	Paper Clip, Small		1	box	
BICGSM11BK	Pen, Ballpoint Black		1	box	
MMM 6549-YW	Post-It Note Pads (3 x 3)		12	each	
FED1104S	Printer Ribbon, Zebra (Thermal Transfer) - Black Resin		1	roll	
SPR-33-1LB	Rubber Bands, #33		1	box	
SWI 35108	Staples, Standard		1	box	
MMM 62003/	Tape, 3/4" Scotch		3	roll	
4X1296					
<b>SPECIALIZED STICKERS &amp; LABELS</b>					
	FEDEX Class 9 Label - Dry Ice Label		1	roll	
3WRY4	Sticker, "Keep Frozen " - 500 / roll		1	roll	
<b>JACKETS, GOWNS &amp; SLIPPERS</b>					
10078	Lab Jackets, Disp. (Blue, Lg) - Kimberly Clark		5	each	
10067	Lab Jackets, Disp. (Blue, Medium) - Kimberly Clark		5	each	
10087	Lab Jackets, Disp. (Blue, X-Lg) - Kimberly Clark		5	each	
<b>TUBES, VIALS, FILTERS</b>					
62.551.201	CryoPro Cryogenic 10mL Vial - Screw On Cap Adjusted, Sterile		2	bag	
03-337-7D	Nalgene Cryovial (2.0 mL, Sterile)		2	case	
03-337-7H	Nalgene Cryovial (5.0 mL, Sterile)		5	case	
<b>SHIPPING SUPPLIES</b>					
CJ-3-D-25	Box, Cardboard 3" with 5 x 5 grid - White		15	each	
BX-2-D-81	Box, Cardboard 2" with 9 x 9 grid		50	each	
CJ-3-D-81	Box, Cardboard 3" with 9 x 9 grid - White		100	each	
STP 730	Combination Bag and Envelope System - 50 Units per case		3	case	
03-528-18	Shipper (Insulated, Styrofoam, Medium) - 16 x 16 x 16		25	each	
03-530-71	Shipper (Insulated, Styrofoam, Small) - 14 x 14 x 10		8	each	
MMM 3710-	Tape, 2" Packing		6	roll	
2-TT					
<b>MEC SUPPLIES</b>					
PC528004	Hand Lotion - Lubriderm - Pump Bottle		1	bottle	
PC720891	Tissues - Facial		3	box	

## Exhibit 12-1. 24-hour urine start of stand pull sheet (continued)

## 24 Hour Urine Start of Stand Pull Sheet

Stand 323  
Non-Consumable

Site ID: MEC 3

Part #	Description	Previous EOS Count	Par	Unit	Ship to Stand
<b>OFFICE SUPPLIES</b>					
ACM 40618	Scissors, Office		3	each	
BOS B440BK	Stapler, Standard Size		3	each	
MMM C38-BK	Tape Dispenser, Scotch		3	each	
<b>SHIPPING SUPPLIES</b>					
14-241B	Aluminum Ice Scoop		1	each	
11-394-200	Gloves, Cryo Insulated, Large		1	pair	
H-150	Tape Gun, 2"		1	each	
<b>COMPONENT TOOLS</b>					
89090-522	3000mL Glass Beaker - Pyrex		3	each	
5YHA0	5000mL Glass Beaker - Pyrex		3	each	
7518204367	Absorbant Dish Drying Mat - Black, X-Large		1	each	
5159603520	Dish Drying Rack - Black, Plastic		1	each	
15-059-147	Exact -Temp Refrigerator Thermometer - Red Liquid Therm. with Bottle		1	each	
15-059-145	Exact-Temp Freezer Thermometer (Ultra-Low, -90C) - Red Liquid Therm. with Bottle		1	each	
S-06369-25	Glass Stir / Mixing Rod - 3/8" x 14 3/4" Glass Rod		8	each	
03-448-17	Multicolor 4-Way Flip Racks - Set of 4 Racks		1	each	
14-809-101	Nalge 13mm Half Rack - Unwire Plastic		2	each	
720461	Plastic 12" Ruler		3	each	
640066	Plastic Tote / Lid - Black, 13 Gallon		1	each	
9A-33810	Protective Eyewear - Scratch Resistant		1	pair	
7314906589	Rubbermaid Wash Basin - Black, Plastic		1	each	
PMC-04962	Security Cash Box - Locking Box w/ Key		2	each	
15-077-19	Thermometer, Solar		1	each	
	Lot: #####				Exp DT: 04/10/2014
	Lot: #####				Exp DT: 01/11/2015
	Lot: #####				Exp DT: 05/06/2015
	Lot: #####				Exp DT: 07/16/2015
H-723	Utility Knife - Retractable Blade, Gray		2	each	
Wal-Cal	Wall Calendar, 8" x 11" - Hanging 12 Month Calendar		3	each	
03-409-10E	Wash Bottle - Deionized Water - Clear Squeeze Bottle		1	each	

## Exhibit 12-1. 24-hour urine start of stand pull sheet (continued)

## 24 Hour Urine End of Stand Inventory Count Sheet

Stand 323  
Consumable

Site ID: MEC 3

Counted By:

Part #	Description	Par	Unit	Count
<b>EXAM SUPPLIES</b>				
ABS 3x3	Absorbent Sheets (3" x 3")	1	pack	
14-666-301	Bench Kote Paper - 46" x 57" Paper for Lab Counte	2	pack	
S0-Bleach	Bleach - Regular - 5 - 5.25 Hydrochloride, Fragra	1	gallon	
1441266	Bleach Right Disinfecting Spray - 32 Ounce Spray Bottle	2	bottle	
S-16727	Cardboard Filler Box - 5" x 5" x 8" Brown Box	3	bundle	
487960	Commode Collection Top Hat - 27 Ounce, White	1	case	
23-751610	Deionized Water - 1 Gallon Plastic Bottle	3	gallon	
	Lot: 300768 Exp DT: 02/28/2016			
	Lot: 306250 Exp DT: 03/31/2016			
	Lot: 323137 Exp DT: 03/31/2016			
	Lot: 326986 Exp DT: 05/31/2016			
	Lot: 350250 Exp DT: 06/30/2016			
	Lot: 359166 Exp DT: 08/31/2016			
	Lot: 369533 Exp DT: 09/30/2016			
761282	Gloves, Sterling Nitrile Large - Gray Glove, 100 pairs per box	3	box	
747112	Gloves, Sterling Nitrile Medium - Gray Glove, 100 pairs per box	3	box	
747113	Gloves, Sterling Nitrile Small - Gray Glove, 100 pairs per box	3	box	
GOJ-9639	Handsoap-Waterless (Purrell) -	3	bottle	
12CT				
10033740	Large Travel Tote - Insulated Cooler Bag, Blue or	5	case	
23-100-125	Sani-Cloth Towelettes - Individual Wipe	14	pack	
06-66997	Towelettes, Sani-Cloth (Cleaner)	2	bottle	
13 711 36	Transfer Pipette (15mL ,8.0 Bulb Clear) - 250 per box	3	box	
86.1171	Transfer Pipette (3.5 clear, plastic)	2	box	
111134	Travel Cooler Bag - Black, Zipper Bag	1	case	
14-375-248	Urine Collection Container - 3 Liter, Amber w/ Cap Adjusted	11	case	
	Lot: 1108541 Exp DT: 12/31/2050			
03-528B	U-Tek Refrigerant Ice Pack - 12 Ounce	20	case	
15-235-61	Wipes, Terri (23" x 11")	2	box	
62-28	Zip Lock (Mini-Grip) - Red Line, 9" x 12"	1	pack	
274-20H	Zip Lock Bag - 4mil 12" x 15"	4	pack	
<b>OFFICE SUPPLIES</b>				
107708	Dymo Costar Label (1" x 2 1/8") - 500 labels per roll	3	box	
SAN 25010	Highlighter, Blue	2	each	
SAN 25009	Highlighter, Pink	2	each	
SAN 25025	Highlighter, Yellow	2	each	
AVE 5165	Label - Full Sheet 8.5" x 11" - Lab Label	1	box	
31155	Labels, Zebra (1" x 2.625", clear) - Black Bar Added	2	roll	
HEWQ2610A	Laser Printer Toner Cartridge - HP2300dn - Do Not Count Whats In The Prin	1	each	

## Exhibit 12-1. 24-hour urine start of stand pull sheet (continued)

Part #	Description	Par	Unit	Count
37001	Magic Marker - Ultra Fine Sharpie - Black	3	each	
SAN 30001	Magic Markers - Sharpie - Fine Point Black	4	each	
95.954	Magic Markers, Felt Tip Fine Line (Waterproof)	10	each	
UNV72220BX	Paper Clip, Jumbo	1	box	
ACC 72380	Paper Clip, Small	1	box	
BICGSM11BK	Pen, Ballpoint Black	1	box	
MMM 6549-	Post-It Note Pads (3 x 3)	12	each	
YW				
FED1104S	Printer Ribbon, Zebra (Thermal Transfer) - Black Resin	1	roll	
SPR-33-1LB	Rubber Bands, #33	1	box	
SWI 35108	Staples, Standard	1	box	
MMM	Tape, 3/4" Scotch	3	roll	
62003/4X12				
96				
<b>SPECIALIZED STICKERS &amp; LABELS</b>				
	FEDEX Class 9 Label - Dry Ice Label	1	roll	
3WRY4	Sticker, "Keep Frozen " - 500 / roll	1	roll	
<b>JACKETS, GOWNS &amp; SLIPPERS</b>				
10078	Lab Jackets, Disp. (Blue, Lg) - Kimberly Clark	5	each	
10067	Lab Jackets, Disp. (Blue, Medium) - Kimberly Clark	5	each	
10087	Lab Jackets, Disp. (Blue, X-Lg) - Kimberly Clark	5	each	
<b>TUBES, VIALS, FILTERS</b>				
62.551.201	CryoPro Cryogenic 10mL Vial - Screw On Cap Adjusted, Sterile	2	bag	
03-337-7D	Nalgene Cryovial (2.0 mL, Sterile)	2	case	
03-337-7H	Nalgene Cryovial (5.0 mL, Sterile)	5	case	
<b>SHIPPING SUPPLIES</b>				
CJ-3-D-25	Box, Cardboard 3" with 5 x 5 grid - White	15	each	
BX-2-D-81	Box, Cardboard 2" with 9 x 9 grid	50	each	
CJ-3-D-81	Box, Cardboard 3" with 9 x 9 grid - White	100	each	
STP 730	Combination Bag and Envelope System - 50 Units per case	3	case	
03-528-18	Shipper (Insulated, Styrofoam, Medium) - 16 x 16 x 16	25	each	
03-530-71	Shipper (Insulated, Styrofoam, Small) - 14 x 14 x 10	8	each	
MMM 3710-2-	Tape, 2" Packing	6	roll	
TT				
<b>MEC SUPPLIES</b>				
PC528004	Hand Lotion - Lubriderm - Pump Bottle	1	bottle	
PC720891	Tissues - Facial	3	box	

## Exhibit 12-1. 24-hour urine start of stand pull sheet (continued)

## 24 Hour Urine End of Stand Inventory Count Sheet

Stand 323  
Non-Consumable

Site ID: MEC 3

Counted By:

Part #	Description	Par	Unit	Count
<b>OFFICE SUPPLIES</b>				
ACM 40618	Scissors, Office	3	each	
BOS B440BK	Stapler, Standard Size	3	each	
MMM C38-BK	Tape Dispenser, Scotch	3	each	
<b>SHIPPING SUPPLIES</b>				
14-241B	Aluminum Ice Scoop	1	each	
11-394-200	Gloves, Cryo Insulated, Large	1	pair	
H-150	Tape Gun, 2"	1	each	
<b>COMPONENT TOOLS</b>				
89090-522	3000mL Glass Beaker - Pyrex	3	each	
5YHA0	5000mL Glass Beaker - Pyrex	3	each	
7518204367	Absorbant Dish Drying Mat - Black, X-Large	1	each	
5159603520	Dish Drying Rack - Black, Plastic	1	each	
15-059-147	Exact -Temp Refrigerator Thermometer - Red Liquid Therm. with Bottle	1	each	
15-059-145	Exact-Temp Freezer Thermometer (Ultra-Low, -90C) - Red Liquid Therm. with Bottle	1	each	
S-06369-25	Glass Stir / Mixing Rod - 3/8" x 14 3/4" Glass Rod	8	each	
03-448-17	Multicolor 4-Way Flip Racks - Set of 4 Racks	1	each	
14-809-101	Nalge 13mm Half Rack - Unwire Plastic	2	each	
720461	Plastic 12" Ruler	3	each	
640066	Plastic Tote / Lid - Black, 13 Gallon	1	each	
9A-33810	Protective Eyewear - Scratch Resistant	1	pair	
7314906589	Rubbermaid Wash Basin - Black, Plastic	1	each	
PMC-04962	Security Cash Box - Locking Box w/ Key	2	each	
15-077-19	Thermometer, Solar	1	each	
	Lot: #####			Exp DT: 04/10/2014
	Lot: #####			Exp DT: 01/11/2015
	Lot: #####			Exp DT: 05/06/2015
	Lot: #####			Exp DT: 07/16/2015
H-723	Utility Knife - Retractable Blade, Gray	2	each	
Wal-Cal	Wall Calendar, 8" x 11" - Hanging 12 Month Calendar	3	each	
03-409-10E	Wash Bottle - Deionized Water - Clear Squeeze Bottle	1	each	



For Spanish interpreters, call the field office to indicate you have a Spanish only speaking SP and will need an interpreter. If the field office is unable to provide an interpreter for any reason, call the MEC manager to see if they can spare an interpreter for the exam.

For Asian interpreters that are family, the recruiters in the MEC will ask the SP and the family member if they are both available to come to the UMEC for 2 short visits. The recruiters will try to schedule the SP and interpreter on a day that is convenient for both to come back.

For Asian interpreters hired by NHANES, the recruiter will ask if the SP and the interpreter can come back for the appointment. The NHANES interpreters know their schedule a few days in advance. The UMEC technicians must verify these interpreters with the field office, in case the interpreter's schedule has changed.

The Interpreter Request Form is included below (Exhibit 13-1).

## Exhibit 13-1. Interpreter Request form

### Interpreter Request Form



## 24 Hour Urine Collection

### UMEC Request

Please fill out a separate form for each SP.

<b>Stand</b>	Choose a stand.
<b>SPID</b>	Click here to type number.
<b>Needs:</b> Select All That Apply	<input type="checkbox"/> Interpreter Choose a language. <input type="checkbox"/> Reminder Call on Click to select a date. <input type="checkbox"/> Transportation Type pick up time here. <input type="checkbox"/> AM <input type="checkbox"/> PM

**Exhibit 13-1. Interpreter Request form (continued)****Initial Visit Details**

Date	Click to select a date.
Time	Click to type time. <input type="checkbox"/> AM <input type="checkbox"/> PM
Notes	Click here to enter text, if needed.

**Return Visit Details**

Date	Click to select a date.
Time	Click to type time. <input type="checkbox"/> AM <input type="checkbox"/> PM
Notes	Click here to enter text, if needed.

**Initial Visit Arrangements**

Interpreter	Click here to type name.
Phone	Type interpreter's #.
Notes	Click here to enter text, if needed.

**Return Visit Arrangements**

Interpreter	Click here to type name.
Phone	Type interpreter's #.
Notes	Click here to enter text, if needed.

## **Appendix A**

### **Starting and Ending in the UMEC**

## Appendix A Starting and Ending in the UMEC

### Instructions to Collect 24-Hour Urine

Thank you for participating in NHANES. Please be sure to read all the instructions.

The results will only be accurate if you follow the instructions and collect all your urine for a 24 hour period. It is very important that you collect every drop of urine during this 24 hour period. The information we obtain will help us learn about people's nutrition. You will receive \$100 when you bring your urine back.

Appointment to return your urine: \_\_\_\_\_











If you have questions or need to change your appointment, call us at:


### Starting your urine collection:

1. We will ask you to empty your bladder before you leave the mobile center today. We will not collect this urine, but this marks the start date and time of your collection.
2. After you leave our center today, please collect **every drop** of urine in the orange storage container **every time you urinate** (pee) in the next 24 hours.
3. You will take this urine collection kit home with you.

### How to collect your urine while at home:


	1. When you arrive home, place all ice packs in your freezer.
	<ol style="list-style-type: none"><li>2. Place the urine collection kit near the toilet for you to use every time you urinate (pee).</li><li>3. Store all urine (pee) in the orange container every time you urinate (pee).</li></ol>
	<ol style="list-style-type: none"><li>4. For females, place the urine hat under the toilet seat.</li></ol> <p>Do not collect your urine when you are on your period. If you are on your period, call us to re-schedule your day of collection.</p> <p><b>Do not</b> put toilet paper in the urine hat.</p>
	<ol style="list-style-type: none"><li>5. For males, pee directly into the orange container.</li></ol>

	<p>6. Females, pour the urine from the urine hat into the orange container.</p>
	<p>7. Make sure the lid is closed tightly.</p>
 	<p>8. Once there is urine in the orange container, always store the container standing upright to avoid spilling.</p> <ul style="list-style-type: none"> <li>▪ Keep all the urine cold. Store the orange containers in the cooler bag with 3 frozen ice packs or keep it in a large Ziploc bag in the refrigerator.</li> <li>▪ Continue to collect all your urine each time you urinate (pee) during the 24-hour period.</li> <li>▪ If you have to urinate (pee) during the night, be sure to collect your urine and pour it into orange container.</li> <li>▪ When the urine reaches the black line, use another orange container the next time you urinate (pee).</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Urinate (pee) as you normally do. You do not need to fill the containers. We want you to collect all your urine; it does not matter if it's a little or a lot.</li> <li>▪ If you need to pass stool (poop), be sure to collect your urine (pee) first.</li> </ul>
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### **How to collect your urine while away from home:**

If you will be away from home during the 24-hour collection time, take the following items with you and continue to collect **all** your urine:

	<ul style="list-style-type: none"> <li>▪ Black cooler bag</li> <li>▪ 3 frozen ice packs</li> <li>▪ Empty orange container</li> <li>▪ Females – urine hat in Ziploc bag</li> </ul>
---	---

1. Collect all your urine in the orange container while you are away from home. Keep the urine cold by storing the orange container in the cooler bag with ice packs.
2. Remember to always keep the orange container standing upright.

**Ending your urine collection:**

On \_\_\_\_\_(day, date) at \_\_\_\_\_(time) plan to return to the urine mobile exam center to return your urine sample

- Do not urinate (pee) right before your appointment because we will ask you to empty your bladder at the urine mobile exam center.
- We will collect this last urine in your orange container and write the date and time of this last urine under the “End Time” on the container.
- This ends the 24-hour urine collection.
- Please bring back all the orange containers with urine in the large cooler bags with 3 frozen ice packs.
- Return to the same location where you picked up your urine kit.

If you have any questions or need to change your appointment, please call us at:



## **Appendix B**

### **Starting and Ending at Home**

## Appendix B

### Starting and Ending at Home

# Instructions to Collect 24-Hour Urine

Thank you for participating in NHANES. Please be sure to read all the instructions.

The results will only be accurate if you follow the instructions and collect all your urine for a 24 hour period. It is very important that you collect every drop of urine during this 24 hour period. The information we obtain will help us learn about people's nutrition. You will receive \$100 when you bring your urine back.





Appointment to return your urine: \_\_\_\_\_



If you have questions or need to change your appointment, call us at:

## How to collect your urine while at home:

	<p>1. When you arrive home, place all ice packs in your freezer.</p>
	<p>2. Place the urine collection kit near the toilet for you to use every time you urinate (pee).</p> <p>3. Store all urine (pee) in the orange container every time you urinate (pee).</p>
	<p>4. For females, place the urine hat under the toilet seat.</p> <p>Do not collect your urine when you are on your period. If you are on your period, call us to re-schedule your day of collection.</p> <p><b>Do not</b> put toilet paper in the urine hat.</p>
	<p>5. For males, pee directly into the orange container.</p>
	<p>6. Females, pour the urine from the urine hat into the orange container.</p>

	<p>7. Make sure the lid is closed tightly.</p>
  	<p>8. Once there is urine in the orange container, always store the container standing upright to avoid spilling.</p> <ul style="list-style-type: none"> <li>▪ Keep all the urine cold. Store the orange containers in the cooler bag with 3 frozen ice packs or keep it in a large Ziploc bag in the refrigerator.</li> <li>▪ Continue to collect all your urine each time you urinate (pee) during the 24-hour period.</li> <li>▪ If you have to urinate (pee) during the night, be sure to collect your urine and pour it into the orange container.</li> <li>▪ When the urine reaches the black line, use another orange container the next time you urinate (pee).</li> <li>▪ Urinate (pee) as you normally do. You do not need to fill the containers. We want you to collect all your urine; it does not matter if it's a little or a lot.</li> <li>▪ If you need to pass stool (poop), be sure to collect your urine (pee) first.</li> </ul>

## **How to collect your urine while away from home:**

If you will be away from home during the 24-hour collection time, take the following items with you and continue to collect **all** your urine:



- Black cooler bag
- 3 frozen ice packs
- Empty orange container
- Females – urine hat in Ziploc bag

1. Collect all your urine in the orange container while you are away from home. Keep the urine cold by storing the orange container in the cooler bag with ice packs.
2. Remember to always keep the orange container standing upright.

**Start your urine collection on the morning of \_\_\_\_\_ (day, date).**

1. When you wake up, urinate (pee) in the toilet as usual.
  - **Do Not** collect this urine
  - This is the start time of your collection.
  - Write this date and time on the label of all the orange containers – this is your **start date and time**.
  - Collect your urine every time you urinate (pee), even if you have to get up during the night to urinate (pee). Be sure to collect that urine too.

**On \_\_\_\_\_ (day, date), set your alarm to get up at the same time as the start time you wrote on your label.**

1. If you get up during the night to urinate (pee), be sure to collect that urine.
2. Collect your first urine after you wake up. This is the last urine you will collect.
3. Write down the date and time of this last urine on the label. This is your **end date and time**.
4. Please bring back all the orange containers with urine in the large cooler bags with 3 frozen ice packs.
5. Return to the same location where you picked up your urine kit.

If you have any questions or need to change your appointment, please call us at:

## **Appendix C**

### **“What To Do”**

#### **Urine Collection and Shipping Instructions**

#### **English and Spanish**

# **“WHAT TO DO”**

## **Urine Collection and Shipping Instructions**

**Collect one evening and one morning urine sample and ship it to the laboratory using these instructions.**

**Collect your urine samples as soon as possible - ideally within the next 14 days. However, if you cannot collect it within 14 days then please collect and ship it at your earliest convenience.**

**We will send you a check for \$50.00 as soon as you ship the packages.**

### **The bag you received in the mobile examination center includes:**

- Large tote bag with a confidentiality statement, your name written on the bag, and your personal picture sticker
- “WHAT TO DO” Urine Collection and Shipping Instructions sheet
- The home urine collection kits

### **Your Personal Picture Sticker:**

Your picture sticker is unique to you and it is found on:

- The large tote bag with your name written on it
- Your urine collection cups
- The bottom of your shipping boxes

The picture sticker identifies your kits from kits assigned to other people in your household. When collecting and shipping your urine, make sure you use the collection cups and shipping boxes marked with your unique picture sticker.



### **Home Urine Collection Kit Contents:**

- A.** Cardboard shipping box with postage-paid label
- B.** Styrofoam container inside the shipping box
- C.** Temperature monitoring strip
- D.** Ice packs
- E.** Plastic urine collection cup with your picture sticker
- F.** Small blue Ziploc bag
- G.** Larger clear Ziploc bag





## Kit Preparation:

1. Remove the ice packs from your large tote bag and place them in the freezer compartment of your home freezer for at least 6 hours before you collect your samples. Freeze the ice packs flat.
2. When you are ready to collect your sample, remove the correct kit(s) from the large tote bag that has your name and picture symbol on it.
  - For the evening sample, remove the kit with a picture of a moon on the outside of the box.
  - For the morning sample, remove the two kits with a sun on the outside of the box.
3. Open the white cardboard box(es).
4. Remove the Styrofoam lid(s).
5. Remove the collection cup from the box.



## Collect the Evening Urine Sample:

*Evening Sample: Collect the sample between 5:30 p.m. and bedtime. Pick an evening when you will be able to collect the second sample on the following morning.*

1. Before you collect your urine, verify that the picture sticker on the cup matches the picture sticker on the tote bag.
2. When collecting the evening sample, make sure you are using the evening cup with a picture of the moon on it.
3. Urinate (pee) into the collection cup until you have emptied your bladder.
4. Screw the cap on the urine cup tightly and wipe off the outside of the cup.
5. On the label located on the top of the Styrofoam container, write the date and time you collected the urine and answer the questions.



## Collect the Morning Urine Sample:

*Morning Sample: Collect one sample when you first wake up for the day. Collect it the morning after you collect the evening sample.*

*Whenever possible, mail all samples (morning and evening samples) on the same day you collect the morning sample.*

1. Before you collect your urine, verify that the picture sticker on the cup matches the picture sticker on the tote bag that has your name written on it.
2. You will need the morning cups that have a picture of a sun on it.
3. Urinate (pee) into the collection cup until you have emptied your bladder. If you think you will have more urine than the cup can hold, stop midstream and finish the collection in the second cup morning cup.
4. Only collect one morning sample. If all of your urine fits in one cup, throw the second cup away.
5. Screw the cap on the urine cup tightly and wipe off the outside of the cup.
6. On the label located on the top of the lid of the container, write the date and time you collected the urine and answer the questions. (If you needed to use two cups, mark "2 cups" on both labels.)



## Pack the Urine Samples:

*Pack each sample in its shipping container with two ice packs immediately after collection, even if you do not mail the package until later in the day.*

*Discard these instructions and the large bag with your name on it. Do not add additional packaging.*

1. Before packing the samples, double-check the sun and moon symbols on the cup, Styrofoam container lid, and bottom of the shipping box to make sure they match.
2. If you used two morning cups, each cup will be packaged separately.
3. Place the urine cup into the small blue Ziploc bag.
4. Push the air out of the Ziploc bag and seal it.
5. Place the sealed Ziploc bag in the larger clear Ziploc bag. Push the air out of the bag and seal it.
6. Place the sample into the Styrofoam shipping box. Remember to match the moon or sun symbol on your cup with the moon or sun symbol on your box.
7. Place two of the frozen ice packs from your freezer into the box – one on the bottom and one on the side.

A white shipping label with a sun symbol. The label contains a form for recording collection details. The form includes fields for 'Date/Time' (filled with '11/18/13' and '7:30 AM'), 'Time/Date' (filled with '7:30' and 'AM'), and checkboxes for 'Morning collection - I am returning:' (filled with '1 cup only'), 'All the urine is collected in the cup(s).', 'Only a few drops are missing from the cup(s).', and 'More than a few drops are missing from the cup(s).'. There is also a small sun symbol on the right side of the label.

8. Place the Styrofoam lid onto the top of the container inside the box.
9. Verify that the picture sticker on the bottom of the shipping box matches the picture sticker on the tote bag that has your name written on it.

10. Tape the box closed with the tape provided.



### Ship the Urine Sample:

*Use the US Postal Service (USPS) to send the package.*

Take the packages inside the Post Office and hand it to a teller.



Or, take the packages inside the Post Office and put it in the large priority mail drop box. (The large priority drop box is usually located near the self-service kiosk.



***If you have any questions call 1-888-458-4762.***

# “QUÉ HACER”

## Instrucciones para recolección y envío de la muestra de orina

Recolecte una muestra de orina por la noche y una por la mañana y use estas instrucciones para enviarlas al laboratorio.

Tome sus muestras de orina tan pronto como sea posible – lo ideal es dentro de los próximos 14 días. Sin embargo, si no puede tomar las muestras dentro de los 14 días siguientes, entonces

Le mandaremos un cheque por \$50.00 dólares tan pronto como envíe los paquetes.

### La bolsa que recibió en el centro móvil de examen incluye:

- Una bolsa grande con una declaración de confidencialidad, su nombre escrito en la bolsa y una calcomanía impresa con un símbolo elegido únicamente para usted.
- Hoja “QUÉ HACER” Instrucciones para recolección y envío de las muestras de orina
- Materiales para tomar las muestras de orina en el hogar

### Calcomanía con su símbolo personal:

El símbolo impreso en la calcomanía es únicamente para usted y se encuentra en:

- La bolsa grande que lleva su nombre escrito
- Sus envases para las muestras de orina
- La caja de envío para devolver los materiales

El símbolo distingue sus materiales de los materiales asignados a otras personas de su hogar. Cuando tome y envíe su muestra de orina, asegúrese de usar los envases para la muestra y las cajas marcadas con el símbolo asignado únicamente para usted.



### Los materiales para tomar la muestra de orina en el hogar contienen:

- A. Caja de cartón para envío, con etiqueta de franqueo prepagado
- B. Caja de poliestireno dentro de la caja de envío
- C. Cinta para monitorear la temperatura
- D. Bolsas de hielo-gel refrigerante
- E. Envase de plástico para poner la muestra, marcado con su símbolo.
- F. Bolsa pequeña con cierre azul (Ziploc)
- G. Bolsa grande transparente con cierre (Ziploc)



## Preparación de los materiales:

1. Saque las bolsas de hielo-gel refrigerante de su bolsa grande y póngalas en el congelador de su casa por al menos 6 horas antes de recolectar la muestra. Las bolsas de hielo-gel refrigerante deben ponerse planas y horizontalmente en el congelador.
2. Cuando esté listo para recolectar su muestra, saque de la bolsa grande los materiales que llevan su nombre y su símbolo.
  - Para recolectar la muestra de orina en la noche, saque el envase que tiene la imagen de la luna afuera de la caja.
  - Para recolectar la muestra en la mañana, saque los dos envases que tienen la imagen del sol afuera de la caja.
3. Abra la(s) caja(s) de cartón blanco.
4. Saque la(s) tapa(s) de poliestireno.
5. Saque de la caja el envase para la muestra de orina.



## Recolección de la muestra de orina en la noche:

*Muestra de la noche: Recolecte la muestra entre las 5.30 de la tarde y la hora de dormir. Escoja una noche en la que pueda recolectar la segunda muestra a la mañana siguiente.*

1. Antes de tomar la muestra de orina, verifique que el envase lleva el mismo símbolo de la bolsa.
2. Cuando recolecte la muestra de la noche, asegúrese de usar el envase para la noche el cual tiene una imagen de la luna.
3. Orine dentro del envase de plástico hasta que haya vaciado la vejiga.
4. Ajuste bien y apriete la tapa del envase de plástico y limpie la parte de afuera del envase.
5. En la etiqueta que está en la tapa de la caja de poliestireno, anote la fecha y la hora en que se tomó la muestra y conteste las preguntas.



## Recolección de la muestra de orina en la mañana:

*Muestra de la mañana: Recolecte una muestra cuando recién se levante. Recolecte la orina la mañana después de haber recolectado la muestra de la noche.*

*Cuando le sea posible, envíe sus muestras (la de la mañana y la de la noche) el mismo día que recolectó la muestra de la mañana.*

1. Antes de recolectar la muestra, verifique que el símbolo del envase es igual al símbolo que aparece en la bolsa con su nombre.
2. Necesitará los envases de la mañana que tienen la figura del sol.
3. Orine dentro del envase de plástico hasta que haya vaciado la vejiga. Si tiene mucha orina y cree que el envase se podría desbordar, detenga el flujo de orina y use el segundo envase de la mañana para terminar de recolectar la muestra.
4. Recolecte únicamente una muestra. Si usa únicamente un envase para recolectar toda la orina, bote el otro envase.
5. Ajuste bien y apriete la tapa del envase de plástico y limpie la parte de afuera del envase.
6. En la etiqueta que está en la tapa del envase, anote la fecha y la hora en que recolectó la muestra y conteste las preguntas. (Si necesita usar los dos envases, escriba "2 cups" en ambas etiquetas.)



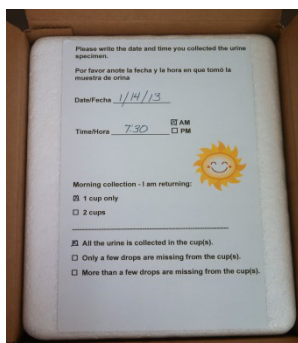


## Empaque las muestras de orina:

*Empaque cada muestra en su caja de envío con dos bolsas de hielo-gel refrigerante inmediatamente después de tomar la muestra, incluso si no las va a enviar hasta más tarde en el día.*

*Puede botar estas instrucciones y la bolsa grande con su nombre. No agregue material adicional de empaque.*

1. Antes de empacar las muestras, vuelva a verificar que las imágenes del sol y la luna del envase son iguales a la de la tapa de la caja de poliestireno y a la de la caja de envío.
2. Si usó dos envases en la mañana, tendrá que empacar cada envase por separado.
3. Ponga el envase de plástico con la orina en la bolsa pequeña con cierre azul (Ziploc).
4. Saque el aire de la bolsa con cierre (Ziploc) y ciérrela bien.
5. Ponga la bolsa (Ziploc) cerrada dentro de la bolsa transparente Ziploc más grande. Saque el aire de la bolsa y ciérrela bien.
6. Ponga la muestra en la caja de envío de poliestireno. Recuerde verificar que las figuras del sol y la luna de los envases son iguales a las figuras del sol y la luna de su caja.
7. Ponga dos bolsas de hielo-gel de su congelador dentro de la caja de poliestireno – una al fondo de la caja y otra al lado.



Please write the date and time you collected the urine specimen.  
Por favor anote la fecha y la hora en que tomó la muestra de orina.

Date/Fecha 1/14/13

Time/Hora 7:30 ☐ AM ☐ PM

Morning collection - I am returning:  
☒ 1 cup only  
☐ 2 cups

☒ All the urine is collected in the cup(s).  
☐ Only a few drops are missing from the cup(s).  
☐ More than a few drops are missing from the cup(s).

8. Para tapar la caja de poliestireno que se encuentra dentro de la caja de envío, use la tapa de la caja de poliestireno.
9. Verifique que el símbolo que aparece en el fondo de la caja de envío es igual al símbolo de la bolsa grande que tiene su nombre escrito.

10. Use la cinta adhesiva que le dimos para cerrar la caja de envío.



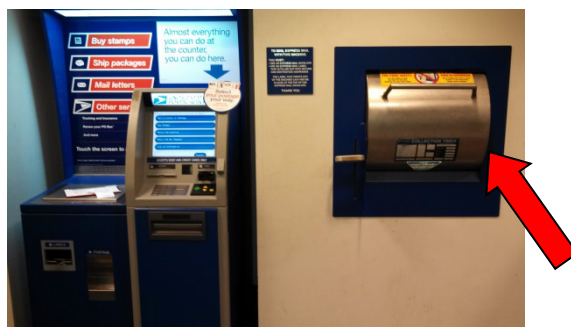
### Envíe las muestras de orina:

*Use el Servicio Postal de Estados Unidos (USPS) para mandar el paquete.*

Lleve los paquetes a la Oficina de Correos y entréguelos a un empleado.



O, lleve los paquetes dentro de la Oficina de Correos y póngalos en el buzón para paquetes grandes y envíos prioritarios. (El buzón para paquetes grandes y envíos prioritarios está habitualmente ubicado cerca del quiosco de autoservicio).



***Si desea hacer alguna pregunta llame al 1-888-458-4762.***

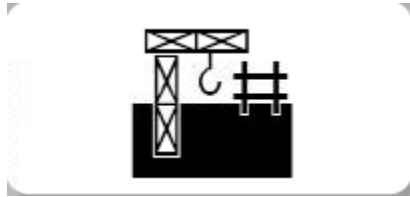
## **Appendix D**

### **Kit Labeling Instructions**



**Participant Unique Symbol:**

**(Located on cup, bottom of shipping box, tote bag)**



**Evening Barcode:**

**(Located on evening cup)**



**Morning Barcode:**

**(Located on morning cups)**



**Evening Kit Moon Sticker:**

**(Located on cup, top of Styrofoam lid,  
bottom of shipping box)**



**Morning Kit Sun Sticker:**

**(Located on cup, top of Styrofoam lid,  
bottom of shipping box)**



## LABELING THE KIT

The kits will be prelabeled with sun and moon stickers. Before beginning the exam, you will need one evening kit and two morning kits. The printer will print 3 barcode stickers and 7 SP specific picture stickers.

- Open each urine collection kit. Confirm that the temperature monitoring strip is affixed to the inside lid of the Styrofoam shipping container.
- On each cup, apply an SP picture sticker and a Dymo barcode label to the center of each specimen cup. Place the stickers side-by-side. [REMEMBER TO MATCH THE SUN AND MOON STICKERS.]
- On the bottom of each shipping box, apply an SP picture sticker.
- On the large plastic tote bag:
  - Apply the appropriate language confidentiality label to the large plastic tote bag if necessary.
  - Write the SP's name with permanent black marker.  
**NOTE:** This is the only location on the kit where the SP name is identified.

Apply one SP picture sticker beside the confidentiality label.

## **Appendix E**

### **Talking Points**

#### **English and Spanish**

## Appendix E

### Talking Points: English and Spanish

**Show the SP the “WHAT TO DO, Urine Collection and Shipping Instructions.”**

- Collection and shipping instructions are included in the kit you are taking home.
- If you have any questions, call the toll-free telephone number on the instructions.

**General Overview:**

- Collect two urine samples – **one** in the evening between 5:30 p.m. and bedtime and **one** the **following** morning.
- Collect your urine sample as soon as possible and ideally within the next 14 days. However, if you cannot collect it within 14 days then please collect and ship it at your earliest convenience. [EXAMINER: ASK FEMALE SPS NOT TO COLLECT THE SAMPLES DURING HER PERIOD.]
- Whenever possible, collect the evening sample when you will be able to mail it the next day along with the morning sample.
- When you get home, place the ice packs in the freezer overnight or for at least 6 hours. Freeze the ice packs flat.

**Label the parts of the kit and show the SP their unique picture sticker.**

- This is your special sticker. If other members in your home participate, they will have a different sticker.

**Show the SP the difference between the evening and morning cups.**

***Evening Collection:***

- Urinate (pee) once into the cup with the sticker of the moon in the evening between 5:30 and bedtime.
- Urinate a full void (until your bladder is empty).
- Screw the lid on the specimen cup **tightly** and package it in the shipping box immediately.
- Place the cup in the small blue Ziploc bag. Squeeze the air out of the bag and **seal** it.
- Put the **sealed** Ziploc bag in the larger clear Ziploc bag. Squeeze the air out of the bag and **seal** it.
- Put two of the frozen ice packs in the box – one on the bottom and one on the side.
- Put the sample in the Styrofoam box with the moon symbol.
- Put the Styrofoam lid on the package.
- On the label on top of the Styrofoam container, write the date and time and answer the questions. [EXAMINER: GO OVER THE LABEL WITH THE SP.]
- Close the box with the tape provided.
- Store the urine inside the Styrofoam container with the frozen ice pack overnight until you collect the specimen in the morning.

**Morning Collection:**

- The following morning, when you first wake up, urinate (pee) into the cup with the sticker of the sun.
- Urinate in the cup until your bladder is empty. You are only collecting **one** sample that contains a full morning void. If that one sample fits in one cup, throw the other kit away. However, if you fill the first cup and you still need to go more, stop mid-stream and finish in the second morning cup.
- If you do not use the second cup with a sun on it, throw it away. Do not mail back an empty cup.
- Screw the lid on the specimen cup **tightly**.
- If you used two cups, package each cup separately.
- EXAMINER: REVIEW PACKAGING INSTRUCTIONS
- EXAMINER: GO OVER THE LABEL WITH THE SP.
  - If you use two morning cups, mark **“2 cups”** on both boxes.

**Mail the samples:**

Take the packages inside the Post Office and hand it to a teller or, take the packages inside the Post Office and put it in the large priority mail drop box. (The large priority drop box is usually located near the self-serve kiosk.

If the urine specimen has not been received by the laboratory in 14 days, then a reminder postcard will be sent to you. If you have already sent your urine then ignore this postcard.

Do **not** mail the large outer plastic bag with your name on it to the laboratory.

We will send you a check for \$50.00 as soon as you ship the package.

**Muéstrele a la persona a quien le da la muestra, las páginas “QUÉ HACER, Instrucciones para recolección y envío de muestras de orina”.**

- Las instrucciones para la recolección y el envío de las muestras están incluidas en el paquete de materiales que usted se llevará a su hogar.
- Si tiene alguna pregunta, llame a la línea gratuita que se encuentra en las instrucciones.

**Información general:**

- Recolecte dos muestras de orina – **una** en la noche entre las 5:30 de la tarde y la hora de dormir, y la **otra** a la mañana **siguiente**.
- Recolecte la muestra de orina tan pronto como sea posible; lo ideal es dentro de los próximos 14 días. Sin embargo, si no puede tomar las muestras dentro de los siguientes 14 días, entonces tómela y envíela tan pronto como pueda.  
[EXAMINADOR: PIDA A LAS MUJERES PARTICIPANTES NO RECOLECTAR LA MUESTRA DURANTE SU PERIODO.]
- Cuando sea posible, recolecte la muestra de la noche únicamente cuando pueda enviarla al día siguiente junto con la muestra de la mañana.
- Cuando llegue a casa, ponga las bolsas de hielo gel refrigerante en el congelador de su casa por la noche o al menos 6 horas antes de recolectar la muestra. Congele las bolsas de hielo gel refrigerante planas y horizontalmente.

**Marque las partes del paquete de materiales para tomar las muestras y muéstrele a la persona a quien da la muestra (SP) la etiqueta con su imagen única.**

- Este es su símbolo especial. Si hay otros miembros de su hogar que también están participando, tendrán otro símbolo único para cada uno de ellos.

**Muéstrele a la persona a quien da la muestra las diferencias entre los envases de recolección de la mañana y los de la noche.**

***Muestra de la noche:***

- Orine una vez en el envase con el símbolo de la luna en la noche entre las 5:30 de la tarde y la hora de dormir
- Orine hasta que haya vaciado la vejiga.
- Cierre y apriete **bien** la tapa del envase y empáquela inmediatamente en la caja para el envío.
- Ponga el envase en la bolsa pequeña con cierre azul (Ziploc). Saque el aire de la bolsa y **ciérrela bien**.
- Ponga la bolsa **cerrada** (Ziploc) dentro de la bolsa Ziploc más grande. Saque el aire de la bolsa y **ciérrela bien**.
- Ponga dos bolsas de hielo gel refrigerante en la caja – una al fondo y otra al lado.
- Ponga la muestra dentro la caja de envío de poliestireno con el símbolo de la luna.
- Tape la caja de poliestireno.

- Apunte la fecha, hora y conteste las preguntas de la etiqueta que está encima de la caja de poliestireno. [EXAMINADOR: EXPLÍQUELE A LA PERSONA A QUIEN DA LA MUESTRA LA INFORMACIÓN QUE TIENE QUE PONER EN LA ETIQUETA]
- Use la cinta adhesiva que le dimos para cerrar la caja.
- Guarde la muestra de orina junto con la bolsa de hielo gel refrigerante dentro de la caja de poliestireno durante la noche, hasta que recolecte la muestra de orina de la mañana.

***Muestra de la mañana:***

- A la mañana siguiente, cuando recién se levante, orine en el envase con el símbolo del sol.
- Orine hasta que haya vaciado la vejiga. Debe recolectar únicamente **una** muestra que contenga todo el contenido de orina de su vejiga. Si la muestra cabe en un solo envase, bote el otro envase. Sin embargo, si llena el primer envase, pero todavía tiene más orina, detenga el flujo de orina y use el segundo envase de la mañana para terminar de recolectar la orina.
- Si no usa el segundo envase con el símbolo del sol, bótelos. No envíe ningún envase vacío.
- Cierre y apriete **bien** la tapa del envase de muestra.
- Si usa dos envases, empáquelos por separado.
- EXAMINADOR: REVISE LAS INSTRUCCIONES DE EMPAQUE
- EXAMINADOR: EXPLÍQUELE A LA PERSONA A QUIEN DA LA MUESTRA, LA INFORMACIÓN QUE TIENE QUE PONER EN LA ETIQUETA
- Si usa dos envases para la mañana, escriba **“2 cups”** en ambas cajas.

**Envíe las muestras:**

Lleve los paquetes a de la Oficina de Correos y entréguelos al cartero o, póngalos en el buzón para paquetes grandes y envíos prioritarios. (El buzón para paquetes grandes y envíos prioritarios está habitualmente ubicado cerca del quiosco de autoservicio).

Si el laboratorio no recibe las muestras en 14 días, se le enviará una tarjeta para recordárselo. Si usted ya ha enviado su muestra de orina, ignore esa tarjeta.

**No** envíe al laboratorio la bolsa plástica exterior con su nombre.

Le mandaremos un cheque por \$50.00 dólares tan pronto como envíe el paquete.



## **Appendix F**

### **Inventory of Home Urine Collection Supplies**

# Appendix F

## Inventory of Home Urine Collection Supplies

### Home Urine Collection

#### Consumable

Part #	Description	Par	Unit	Count
<b>EXAM SUPPLIES</b>				
ConLab-CS	Confidential Label - Chinese Simple - 6 per sheet	5	sheet	
ConLab-CT	Confidential Label - Chinese Traditional - 6 per sheet	5	sheet	
ConLab-Eng	Confidential Label - English - White Handle Bag Label	1	box	
ConLab-Kor	Confidential Label - Korean - 6 per sheet	5	sheet	
ConLab-Span	Confidential Label - Spanish - White Handle Bag Label	1	box	
ConLab-Viet	Confidential Label - Vietnamese - 6 per sheet	5	sheet	
GOJ-9639 12CT	Handsoap-Waterless (Purell)	1	bottle	
HUK - MOON	Home Urine Kit - MOON	90	each	
HUK - SUN	Home Urine Kit - SUN	180	each	
HUC-IS- CS/Eng	Instruction Sheet - Chi. Simp/Eng - Stapled Packet	20	pack	
HUC-IS- ChiTrad/Eng	Instruction Sheet - Chi. Trad/Eng - Stapled Packet	20	pack	
HUC-IS- Eng/Span	Instruction Sheet - Eng/Span Combo - Stapled Packet	90	each	
HUC-IS- Kor/Eng	Instruction Sheet - Kor/Eng - Stapled Packet	20	pack	
HUC-IS- Viet/Eng	Instruction Sheet - Vietnamese/Eng - Stapled Packet	20	pack	
S-596	Mini-Grip Bag 10" x 13" - Zip-Lock Bag, Clear	3	bundle	

ML-CS	Moon Box Top Label - Chi. Simp - 2 per sheet	10	sheet
ML-CT	Moon Box Top Label - Chi. Trad. - 2 per sheet	10	sheet
ML-Kor	Moon Box Top Label - Korean - 2 per sheet	10	sheet
ML-Viet	Moon Box Top Label - Vietnamese - 2 per sheet	10	sheet
AVE 5126	Online Shipping Label - Half Sheet - 5 1/2" x 8 1/2"	270	each
12-23W	Poly Tote Hand Bag - White - 20 x 20 x 5	1	case
TM0103-C	Temperature Monitoring Strip - Range C: 54-65C	20	each
SL-CS	Sun Box Top Label - Chi. Simp. - 2 per sheet	20	sheet
SL-CT	Sun Box Top Label - Chi. Trad - 2 per sheet	20	sheet
SL-Kor	Sun Box Top Label - Korean - 2 per sheet	20	sheet
SL-Viet	Sun Box Top Label - Vietnamese - 2 per sheet	20	sheet
06-66997	Towelettes, Sani-Cloth (Cleaner)	1	bottle
26-32	Twist Tie - 7" White (Trashbag Tie)	1	box
Postage Stamp	USPS Postage Stamp - Single Stamp	270	each

#### OFFICE SUPPLIES

107708	Dymo Costar Label (1" x 2 1/8") - 500 labels per roll	4	box
AVE 08888	Magic Markers, Black	2	each
UNV72220BX	Paper Clip, Jumbo	2	box
84417-10053	SORTKWIK - Finger Moistener - 3/8 ounce container	2	bottle
MMM 62003/4X1296	Tape, 3/4" Scotch	2	roll

**COMPONENT TOOLS**

53382	Compressed Air Spray Can - 10 Oz. 3M Dust Remover	1	bottle
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**MEC SUPPLIES**

PC221670	Tissues - Facial	2	box
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## Home Urine Collection

### Non-Consumable

Part #	Description	Par	Unit	Count
<b>OFFICE SUPPLIES</b>				
MMM C38-BK	Tape Dispenser, Scotch	1	each	
<b>COMPONENT TOOLS</b>				
14783415	E-Z Fold Step Stool - 12" Black	1	each	
ML4042	Footstool - Metal	1	each	
08-952	Scissors - Lister bandage (5 1/2 " Stainless Steel)	1	each	
30.60	Temperature Strip Storage Box w/ Lid - 250mL	1	each	