March 13th, 2020

Guidance for Screening of Research Participants by Clinical Research Staff

Background
The Interim UCSF Policy on Human Subjects-Related Research Visits at San Francisco Campuses during COVID-19 Outbreak, effective March 11th, 2020, states that **research visits should be performed remotely (e.g., by phone, Zoom, or other means) whenever possible.**

Research visits that **cannot** be performed remotely and are essential to a participant's health and/or well-being may be performed in person.

In these cases, all study participants should be:
1. Provided with information regarding the current COVID-19 epidemic and how best to reduce their risk of infection. This information may be provided in multiple forms suited to the type of contact, including a website link, a telephone script and an in-person handout. If possible, this information should be shared **before** the research visit. See the CDC COVID-19 link for reference and materials.

2. Screened for new cough, flu-like illness, new trouble breathing, or fever (measured or subjective) by research staff prior to the in-person research visit if possible, and with repeat screening by research staff at the time of an in-person visit.

3. If a participant screens positive, i.e. is reporting credible COVID-19 symptoms –
   a. If on the phone, instruct them to stay home and contact their primary care doctor
   b. If in-person, follow site-specific/institutional guidance and triage algorithms

Screening Protocol

1	Identify participants essential to be seen in-person	Work with your PI or Providers to identify participants who may be rescheduled or converted to video visit vs those essential to be seen/treated in-person. ALL PARTICIPANT-PARTICIPANTS WILL BE CONTACTED – ABOVE DETERMINES WHAT IS COMMUNICATED
2	Scripts for participant calls	Script for calls to **those with option to reschedule or change to video visit:** I'm calling from Dr. _____'s office at UCSF. I see you have an appointment with her/him on _____. Our clinic/research site is working to minimize exposure for our participants, many of whom have compromised immune systems, so we're calling all participants to see if you are willing to have a video visit instead of in person. The other option is to reschedule for a later date. Would either of these work for you?
		Script for calls to those **coming for in-person visit essential to health/well-being of the participant:** Hello, I'm calling from the _____ Clinic / Lab / Study Team at UCSF. I see you are scheduled to see the doctor/receive treatment with us tomorrow. Due to the COVID-19 virus, we're calling all of our participants with scheduled office appointments to provide information and see how they're feeling. • Do you have ANY of the following: New cough, flu-like illness, new trouble breathing, or fever? • **If answer is YES:** Thank you, please contact your primary care doctor. For the time being, please **plan to stay at home** and we will reschedule your research appointment or schedule a telephone or web-based conference.

		• **If answer is NO**: If you should develop these symptoms before your appointment tomorrow, **we're asking you to stay home and call us at 415-XXX-XXXX**. We will further assess how you are doing and determine next steps to reschedule your appointment. **Please limit the support you bring with you tomorrow to one additional person if possible**. Please make sure that support person is not experiencing a new fever, cough or breathing problems. We cannot allow anyone with these symptoms into our clinics at this time. We look forward to seeing you tomorrow.
3	**No answer to call**	Call the participant up to 3 times - document # attempts made. Intent is to give the participant the opportunity to answer screening questions. If you are not able to speak with the participant before their in-person visit, on the final attempt leave a voicemail saying: This is _____ calling again about your appointment tomorrow at UCSF. Since we were unable to reach you prior to your visit, we are advising participants not to come to their appointments until they have been screened for respiratory symptoms. Our clinic/research site is working to minimize exposure for our participants, many of whom have compromised immune systems. If you've had new cough, flu-like illness, new trouble breathing, or fever, please contact your doctor. Otherwise, please call XXX-XXXX to reschedule your appointment. We apologize for any inconvenience and thank you for your understanding.
4	**Call documentation**	Please document all screening calls/phone encounters in the participant's research chart.
6	**Resources for Participants**	If you have questions about the Coronavirus, please call our hotline at 415-514-7328. You can also find additional information about the Coronavirus by searching the San Francisco Department of Public Health site, the Center for Disease, Control and Prevention website or go to www.ucsf.edu/coronavirus
7	**If your participant phones you**	If they have an upcoming appointment, please screen as described in #2 above If they do not have an upcoming appointment but have a question/concern about their health as relates to COVID-19, **please instruct them to call their Primary Care Provider** / Provider's clinic (Specialist Provider, if/as appropriate)

Additional resources and supporting documents
1. UCSF COVID-19 Website (Materials available in the Research Guidance Tab)
2. https://infectioncontrol.ucsfmedicalcenter.org
3. Centers for Disease Control and Prevention
4. Text "**COVID19SF**" to **888777** to receive updates from the San Francisco Department of Public Health

Where to Direct Questions
1. Coronavirus: emer.mgt@ucsf.edu
2. Research visits and/or screening participants: research@ucsf.edu
3. If your Investigator/Supervisor has information that conflicts with any of the above, please contact research@ucsf.edu for clarification.