

SCANNABLE FORMS GUIDELINES

1. MrOS Participant files

All original forms should be kept as a source document in the participant's clinic file with any lab reports or examiner visit notes.

2.0 MrOS Study Forms

The MrOS Sleep Study Forms are created with the Cardiff Teleform software program, which allows the data to be scanned or faxed into the MrOS database. In order for the computer to read the data as it is faxed in from the clinics, a few basic guidelines must be followed when filling out the forms (please see Section 3 below).

After the participant or clinic staff member has filled out the form, it should be reviewed for completeness and accuracy. Any problems or mistakes found on the form should be addressed before the form is submitted to the data system. **DO NOT RELY ON THE DATA SYSTEM FINDING EDITS!**

All forms will be available on the MrOS web site under Study Documents under "Sleep Visit Forms and Protocols". The forms will be available individually as well as in 4 sets: 1) all forms for the self administered questionnaire, 2) all forms for the clinic exam measures, 3) all forms for the actigraphy sleep diary, and 4) all forms for polysomnography morning survey.

For this visit, a sleep enrollment form will be completed for every MrOS participant contacted to be part of the sleep study. This form will be found on the web site and should be the first form submitted to the data system after a participant's visit is complete. This form should also be completed and submitted to the data system for participants that decide not to participate in the sleep study.

2.1 Printing Participant Forms with ID and Acrostic

Each clinic will be responsible for printing off participant's forms as needed. This will allow for the participant ID and Acrostic to be printed directly onto the participant's forms. The directions for printing forms assumes a PC computer (not an Apple) are being used.

Step 1: Creating a folder to store forms on your hard drive

You should download the forms from the MrOS web site and store them on your computer's hard drive. **DO NOT ENTER PARTICIPANTS' IDS AND ACROSTICS DIRECTLY ON THE MrOS WEBSITE.**

The Coordinating Center will send a message to the clinics anytime the forms are changed or updated. At this time, clinics should delete old versions of the forms from their hard drive and downloaded updated forms from the MrOS web site.

We recommend that you store the forms on your hard drive in a folder called: "C:\MrOS\SleepVisit\Forms". Here are directions as to how to create such a folder:

1. Double-click on 'My Computer' icon on the desktop of your computer.
2. Double-click on the C: folder.
3. Under File, go to New, and then select Folder.
4. Name the new folder 'MrOS'.
5. Double click on the folder named MrOS.
6. In the MrOS folder, go to File, . . .New, . . .Folder.
7. Name the new folder 'Sleep Visit.'
8. In the 'SleepVisit' folder, go to File, . . . New, . . . Folder.
9. Name the new folder 'Forms'
10. Close all the open windows.

Step 2: Downloading the forms.

1. Go to www.keeptrack.ucsf.edu.
2. Log onto the MrOS web site.
3. Click on the 'Study Documents' link in the page header.
4. Click on the 'Sleep Visit Forms' link.
5. Right click on the link for 'Self Administered Questionnaire.'
6. From the menu that appears, select 'Save target as . . .'
7. When prompted, save the file to the folder that was created in Step 1.
(C:\MrOS\Sleep Visit\Forms.)
8. Repeat this process for the Clinic Measures, Actigraphy, and Polysomnography forms.
Individual pages can be saved as needed.

Step 3: Pre-printing the ID and Acrostic on the forms.

1. Open the form file from your hard drive that you want to the print the ID and acrostic on.
(*Your internet connection does not have to be active for this step*)
You can open the form file in a number of ways:
 - a. Double click on the file, and it should open into Adobe Acrobat Reader.
 - b. Open Adobe Acrobat Reader, and then from File . . . Open, open the file.
2. Once the file is open, go to the first page of the file where the ID and acrostic boxes appear.
3. Click on the ID box.
4. Type in the participant's ID.
5. Either hit TAB, or click on the acrostic box.
6. Type in the participant's Acrostic.
7. Go to File . . . Print.
8. Click 'OK'.
9. The file will print with the participant's ID and acrostic on every page.

To print another participant's ID and acrostic:

1. Click on the ID box and type in that participant's ID.
2. Hit TAB or click on the Acrostic box and enter the acrostic.

When you are done with the form file, exit the program (by going to File . . . Exit.)
When prompted, select 'no' to save changes to the file. *It is a good idea not to save changes -- saving changes to a file many times in a row will cause the file to become unnecessarily large.*

3. Filling out 'Scannable' Forms

3.1 The Basics

1) Use a black pen

- Do not use a felt tip pen that bleeds
- Do not use a pencil

2) Avoid making any stray marks

- Do not mark or write in the lower left hand corner (the 'Page link' box)
- Do not mark or write in the lower right hand corner (the 'Form code' box)
- Do not make any extraneous notes anywhere on the form. Record notes only in designated areas.

3) Fill in the bubbles completely

- Stay within the lines
- Do not use an "X" or a check

4) Do not fold, staple, or mutilate the data forms

3.2 Letters and Numbers

1. Print in capital letters
2. Print only one letter or number per box
3. Keep the letter/number completely inside the box
4. The letter/number should not touch or cross any of the box lines
5. The Cardiff Teleform software removes the box lines and may remove part of the character.
6. Do NOT cross your zeros (0), sevens(7) or 'Z.'
7. Avoid "curly-cues" on letters and numbers.
8. Make your letter and numbers as similar as possible to the example in Appendix A.
9. Pay particular attention to the following groups of letters that are often difficult to distinguish from each other. P,D,O J,L,C U,O The computer might have difficulty reading a person's handwriting, even if that person has 'neat' handwriting to the human eye.

3.3 Correcting for a mistake

See Appendix B for examples.

DOs:

- DO** cross out the wrong answer by drawing a line through the mistake.
- DO** fill in the correct answer in the appropriate bubble.
- DO** circle the correct answer.
- DO** initial and date the correct answer.
- DO** leave questions blank that the participant can't or refuses to answer.

DO NOTs:

- DO NOT** erase pen.
- DO NOT** use correction tape/white out (i.e. Liquid Paper)

3.4 Submitting the Forms to the Data System

The completed MrOS Sleep Study Forms should be submitted to the Coordinating Center via fax or digital sender per the following guidelines:

1. The Sleep Enrollment Form should be the first form submitted to the data system. It should be submitted within 24 hours of the clinic visit. Other forms should not be submitted until the Enrollment Form has been successfully received by the data system.
2. In general, all of the forms from one visit should be faxed together. If the participant completes the PSG, the medication inventory and urine data collection forms should not be submitted until after PSG is complete.
3. If faxing, always fax by feeding the tops of the forms into the fax machine.
4. Do NOT include a cover sheet when you fax the forms in. (A cover sheet is not necessary because the fax number is a dedicated MrOS study fax line.)
5. Only submit TELEforms to the data system. Do NOT submit PSG forms that should be sent to the PSG reading center, lab reports, or any examiner visit notes or other NON-TELEform forms.
6. Fax the forms to the Coordinating Center at (415) 597-9174

Appendix A

Optimal letters/numbers for TELEform software

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

1	2	3	4	5	6	7	8	9	0
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Appendix B

Sample corrections for various questions

Example 1: Changing a response to a YES/NO or multiple choice question.

In this example, the participant marked incorrect marital status category. She is actually divorced but marked married by mistake.

① What is your current marital status?

Married or living in a married-like relationship
 Divorced
 Widowed
 Single, never married
 Separated

PM, 11/13/2001

Example 2: Changing a response to a YES/NO, multiple choice or fill in the blank question to null.

In this example, the participant marked answers to parts a and b when she was not supposed to. The answers to these questions should be blank, or null.

③ In the last 12 months, have you fallen and landed on the floor or ground or fallen and hit an object like a table or chair?

Yes No Don't know

a. How many times have you fallen in the last 12 months?

falls

b. When you fell during the last 12 months, did you fracture any bones?

Yes No

Which bones? _____

PM, 11/13/2001

Make sure the line goes through the circles of all the other options!

Example 3: Changing a response to a fill in the blank question.

In this example, the participant wrote in 22 years when she meant to write in 24 years.

④ How long have you been in this current living arrangement?

years

PM, 11/13/2001

Do NOT correct mistakes as the following:

years

WRONG!

years

WRONG!