

### Sample Agenda for Weekly 1-on-1s

- Can be adapted for project specific needs, and items may vary based on the point of the intervention (ie. enrollment period vs. post-enrollment period)
- Sub-bullets are included as examples for reference, but higher-level bullets only may be included in the calendar invite for the CHW and meeting items tailored each week

### Agenda – Weekly 1v1 Meeting

- Check-in
- Schedule and Timeline
- Intervention Status
- Concerns / Challenges
- Training / Support
- Other items
- Goals for the Week

### Supervisor guidance:

- Check-in: *ie. Ask how their weekend was, or how their week has been going*
- Schedule and Timeline – *You can check in on the CHW's anticipated schedule for the week and any scheduled sessions/calls. If they do not have a solid weekly plan, you can help them create one at the end of the meeting.*
- Intervention Status – *You can consider showing a simple list or chart with the number of completed items and pending/due items (like a simpler version of the recruitment update excel, by CHW):*
  - o *Enrollment (Month 1)*
  - o *Baseline Survey Completion (Month 1)*
  - o *Sessions Completion (Months 1 – 5)*
  - o *Phone-based goalsetting (Action Plans, Progress Notes, 1-on-1 visits)*
  - o *Endpoint Completion (Month 5/6)*
- Concerns / Challenges
  - o *Ask the CHW if they have any concerns and/or are experiencing any challenges*
- Training / Support – *Identify and address training needs, for example:*
  - o *REDCap Documentation*
  - o *Survey Administration*
  - o *Knowledge of Curriculum Content*
  - o *Presentation Practice*
  - o *Other*
- Other items – *Ask the CHW if they have any items they'd like to discuss; Discuss Admin/timekeeping items, institutional updates, etc.*
- Goals for the Week – *Set clear goals and deliverables for the week, and follow-up as needed on priority items*

## Sample emails documenting one-on-one meetings and follow-up

### Notes/considerations:

- Use as relevant, but note that many items follow direct training during 1-on-1 meetings on REDCap documentation and demonstrations of how to use the queries/reports referred to; List of UIDs or the report provided to aid CHW follow-up.
- Tailor style of communication to the CHW: It can be challenging to find the right balance so it doesn't feel like micromanagement. Start out simple, and ask if they would like you to provide them with UIDs that are overdue, for example, or a report of all participants who have missing data, etc. Over time, you will figure out what type of communication works best.

### Sample Supervision Emails:

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Dear XXX,

Thank you for meeting with me yesterday to review recruitment at Site XXX. I've provided my notes from our conversation below. Please let me know if I am missing anything.

### [Date] Weekly Meeting Recap and Next Steps:

1. We discussed the following strategies for participant outreach, and demonstrated using REDCap:
  - a. Prioritize the # Eligible pending enrollment category to bring 37 screened participants to sessions
    - i. Call these participants using the Query: **Eligible Pending Enrollment Check**
  - b. Call to screen the 3 people who have been reached but not yet screened (IDs 079, 082, 117)
  - c. Give one more call to 13 Contact Attempts in Progress in order to change status to Do Not Call – Call Limit Reached
    - i. Leave a message for UIDs 048, 055, 072, 083, 095, 106, 108, 118, 120
    - ii. Call one more time to verify these are wrong/disconnected numbers then end calls: UIDs 078, 097, 069, 105
2. XXX shared concerns about meeting the enrollment target with her current list. She feels that many of her patients are young and working, and not as interested in attending sessions. We discussed that she has screened 37 individuals, which is a good number, since we would only need to bring in 19 of those to a session to meet the goal. However, it would be helpful to have a better sense of how many of these are most likely not interested. XXX will call through the list and check in about this at next week's meeting.

Please let me know if you have any questions accessing the REDCap queries. I will be happy to answer any questions at our next weekly meeting scheduled for [Date / Time].

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Dear XXX,

Thanks for meeting with me today to review recruitment at Site XXX. I've provided my notes from our conversation below. Please let me know if I am missing anything.

[Date] Weekly Meeting Recap and Next Steps:

1. XXX called all the participants in the categories detailed last week. Jennifer demonstrated how to update the status on the Tracking Form to "Declined" or "Do Not Call – Call Limit Reached" to align with her notes in the Contact Attempts.
2. XXX is notifying participants that enrollment is ending shortly and that her next scheduled sessions will take place on [Date] and [Date].
3. XXX has concerns about meeting the enrollment target with her current list. XXX will make a list and let Jennifer know by Wednesday morning how many participants she thinks are likely/unlikely to participate.
4. XXX does not feel comfortable asking the doctor for more availability to hold sessions. Jennifer proposed that project staff can ask the doctor when the next Enrollment Report is emailed.
5. Jennifer asked if recruitment assistance by [male CHW] to male participants would be helpful. XXX did not think it was necessary but will let Jennifer know by Wednesday morning.

Please let me know if you have any questions accessing the REDCap queries. I will be happy to answer any questions at our next weekly meeting scheduled for [Date/Time].

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Dear XXX,

Thank you for meeting with me today to review status at Site XXX. Please let me know if you have any additions to my notes below:

[Date] – Weekly 1-on-1 Follow-up and Next Steps

1. **Enrollment/sessions update:** XXX has enrolled 14 participants, and is scheduling sessions this week. She will update REDCap with contact attempts. **XXX was provided a list of 31 new names to call on 1/31.**
2. **Action Plans/Goal-setting:** XXX is going to complete Action Plans with individuals who are overdue or due, as per the attached email from 1/31/19. Action Plans are completed 2 weeks from enrollment date. The following are due: 003, 112, 113, 058, 071, 041, 107
  - a. **Track Action Plans completion in REDCap:** Jennifer demonstrated how to use query **"Goal-setting Tracking (Action Plan/Progress Note #1)"** to track completion of Action Plans
3. **Scheduling Session 2s / Contact Attempts- Intervention** – XXX was asked to start scheduling Session 2s for all participants who she completes Action Plans with and who were enrolled in the first half of January. Jennifer demonstrated how to use the query **"Session 2 Scheduling"**.
4. **Session 2 Presentation has been rescheduled** for next [Date/Time] prior to holding any Session 2s.

Please let me know if you have any questions accessing the REDCap queries. I will be happy to answer any questions at our next weekly meeting scheduled for [Date/Time].

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Dear XXX,

Thank you for meeting with me today to review status at Site XXX. Please let me know if you have any additions to my notes below:

[Date] – Weekly 1-on-1 Follow-up and Next Steps

1. **Enrollment/sessions update:** XXX has enrolled 17 participants. Jennifer said that we will brainstorm ways to help improve recruitment at this site for Round 2, but for now, it is important to provide these 17 participants with a high-quality intervention and complete intervention activities on-time.
2. **Scheduling Session 2s / Contact Attempts- Intervention** – XXX was asked to start scheduling Session 2s for all participants and complete by [deadline]. Jennifer demonstrated how to use the query “**Session 2 Scheduling**”.
3. **Action Plans/Goal-setting:** XXX has completed all 10 Action Plans for individuals who are overdue or due. She will begin Action Plans for the newly enrolled participants once they are uploaded in the REDCap Intervention Database.
  - a. **Track Action Plans completion in REDCap:** Jennifer demonstrated how to use query “**Goal-setting Tracking (Action Plan/Progress Note #1)**” to track completion of Action Plans
  - b. **Review Action Plan Details in REDCap:** Jennifer demonstrated how to use query “**Action Plan Details**” to easily review participants’ goals prior to completing their next Progress Note.
  - c. **Review Participants with NO Physical Activity at Intake:** Jennifer demonstrated how to use query “**Reported NO Physical Activity at Intake**” to easily review which participants were doing NO physical activity prior to starting the intervention. Jennifer recommended working with these participants to gradually bring up their Physical Activity levels every 2 weeks to get them to the recommended 150 minutes per week by the end of the intervention.
4. **Session 2 Presentation was rescheduled** for today. Jennifer reviewed the newly added Mango Juice Activity.

Please let me know if you have any questions accessing the REDCap queries. Our next weekly meeting is scheduled for [Date/Time].

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Dear XXX,

Thank you for meeting with me today to review status at Site XX. Please let me know if you have any additions to my notes below:

[Date] – Weekly 1-on-1 Follow-up and Next Steps

1. **Enrollment/sessions update:** XXX enrolled 17 participants. Recruitment debrief will be held with the full team and Nadia on [date] to discuss in more detail.
2. **Scheduling Session 2s / Contact Attempts- Intervention** –4 out of 17 participants have completed Session 2, and the sessions are going well. XXX is planning to hold her next sessions on [date] and [date]. **Deadline for Session 2 Completion is [Date]**.

3. **Action Plans/Goal-setting:** XXX has completed 10/17 Action Plans. The rest of the enrolled participants are due and have been uploaded in the REDCap Intervention Database. XXX will complete them this week.
  4. **Progress Note #1:** Some of XXX's participants are almost due for Progress Note #1. Jennifer reviewed the form as well as strategies for building on goals set during the Action Plan and "setting the participant up to succeed" by working with the participant to set goals that are realistic and achievable. Progress Notes will be completed every 2 weeks, and the date/time should be set with the participant at the end of the call.
    - a. **Review Goal-Setting/MI Training and Resources:** Jennifer emailed these on [date] and they are saved here: **J:\DREAM Initiative - CHW\Goalsetting Resources**  
**Track Progress Note #1 completion in REDCap:** Use query "Goal-setting Tracking (Action Plan/Progress Note #1)" to track completion of Progress Note #1.
    - b. **Review Action Plan Details in REDCap prior to starting Progress Note #1:** Review the query "Action Plan Details" to easily review participants' goals prior to completing Progress Note #1.
    - c. **Review Participants with NO Physical Activity at Intake:** Jennifer reviewed the query "Reported NO Physical Activity at Intake" to easily review which participants were doing NO physical activity prior to starting the intervention. Jennifer recommended working with these participants to gradually bring up their Physical Activity levels every 2 weeks to get them to the recommended 150 minutes per week by the end of the intervention.
  5. **Documenting Referrals in Encounter Reports:** XXX has referred participants for services for insurance and English/computer classes at [CBO]. Jennifer asked that these be documented in the Encounter Reports section so that we can track the referrals made. XXX will follow-up on these services during her follow-up phone calls to see if participants accessed the services.
- Please let me know if you have any questions. Our next weekly meeting is scheduled for [Date/Time]. Please provide advance notice if you need to reschedule.

Dear XXX,

I'm sorry we were unable to meet this week in-person to discuss progress at Site XXX. I'd like to share some notes for you after reviewing REDCap (see below):

[Date] – Weekly 1-on-1 Follow-up and Next Steps

1. **Completing Session 2s–** 11/17 participants have completed Session 2. Deadline for Completion of Session 2s is [Date].
2. **Beginning Session 3s –** Please schedule Session 3s for next week.
3. **Action Plans/Goal-setting:** completed 17/17 Action Plans- Great job!
4. **Progress Note #1:** completed 0/17 Progress Notes. Participants are overdue. Please complete these as soon as possible. I suggest using calendar invites as reminders to block out time on office days to complete the phone calls. Progress Notes should be completed every 2 weeks, so that there are 2 for each session month.
5. **Documenting referrals –** Thank you for documenting referrals made for Health Insurance and ESL classes. Please document any future referrals in the Progress Note/Encounter Form, as well as follow-up on previously made referrals in upcoming follow-up calls in order to document if participants accessed the referred services. Please check in with Shinu if you have any trouble logging the referrals in Healthify.

Please let me know if you have any questions. Our next scheduled meeting is: [Date].

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Hi XXX,

Thanks for checking-in with me this week to review status at Site XXX.

As we discussed, the priorities for the next two weeks will be:

1. **Completing Session 4s** (with anyone who is willing to complete this session during Ramadan)
  - a. **Use the “Sessions 1-5 tracking – Round 1” Query to see who is remaining. See below screenshot.**
2. **Completing Progress Notes for Month 5** (2 calls with all 17 participants) and **Enter in REDCap**
  - a. The query **“Progress Notes – Month 2-5 Tracking”** will help you see when your participants are due for a call
3. **Documenting and following up on all referrals** – Please be sure to review the previous referrals made for each participant and ask if they accessed the services. Please be sure to document all follow-up on referrals.
  - a. Review these Queries for your site to see the details of your referrals: 1. Encounter Report Details and 2. Referrals/Services Requests
4. **Begin to schedule Session 5s for after Ramadan** with all participants who will be due for the Endpoint Survey. Please see the survey windows below and attached.
  - a. Note: for anyone who does not complete Session 4 during Ramadan, please give a combined Session 4/5 after Ramadan.
  - b. All sessions and surveys should be completed by [date].

Please let me know if you have any questions.

**Sessions 1-5 tracking – Round 1 (Note: UIDs were provided but removed for this document)**

ance st_	Intake Date i_date	a. Date of session 1 session1_date	a. Date of session 2 session2_date	a. Date of session 3 session3_date	a. Date of session 4 session4_date	a. Date of session 5 session5_date	Progress note date pn_date_1	Intake Date fu_date
	02-08-2019	02-08-2019	03-01-2019	04-11-2019			03-08-2019	
	01-30-2019	01-30-2019	03-15-2019	03-30-2019			03-15-2019	
	01-25-2019	01-25-2019	02-25-2019	03-30-2019			03-04-2019	
	01-24-2019	01-24-2019	03-05-2019	04-04-2019			03-05-2019	
	02-04-2019	02-04-2019	02-25-2019	03-15-2019			03-14-2019	
	02-02-2019	02-02-2019	03-16-2019	03-16-2019			03-09-2019	
	01-19-2019	01-19-2019	02-28-2019	03-14-2019			03-08-2019	
	01-14-2019	01-14-2019	02-22-2019	03-23-2019			03-09-2019	
	01-14-2019	01-14-2019	02-22-2019	03-23-2019			03-09-2019	
	01-14-2019	01-14-2019	02-22-2019	03-15-2019	04-13-2019		03-07-2019	
	02-09-2019	02-09-2019	02-25-2019	03-26-2019	04-13-2019		03-08-2019	
	01-18-2019	01-18-2019	02-16-2019	03-16-2019	04-13-2019		03-16-2019	
	01-24-2019	01-24-2019	02-26-2019	03-11-2019	04-18-2019		03-06-2019	
	01-19-2019	01-19-2019	02-15-2019	03-14-2019	04-18-2019		03-04-2019	
	02-01-2019	02-01-2019	03-01-2019	04-11-2019	05-03-2019		03-08-2019	
	01-18-2019	01-18-2019	02-15-2019	04-04-2019	05-03-2019		03-07-2019	
	02-02-2019	02-02-2019	02-16-2019	03-30-2019	05-03-2019		03-07-2019	

### Endpoint Survey Windows:

UID	Intake Date	Window Begins (6 months - 45 days)
<a href="#">003</a>	1/14/2019	5/30/2019
<a href="#">112</a>	1/14/2019	5/30/2019
<a href="#">113</a>	1/14/2019	5/30/2019
<a href="#">058</a>	1/18/2019	6/3/2019
<a href="#">071</a>	1/18/2019	6/3/2019

<a href="#"><u>041</u></a>	1/19/2019	6/4/2019
<a href="#"><u>107</u></a>	1/19/2019	6/4/2019
<a href="#"><u>026</u></a>	1/24/2019	6/9/2019
<a href="#"><u>047</u></a>	1/24/2019	6/9/2019
<a href="#"><u>022</u></a>	1/25/2019	6/10/2019
<a href="#"><u>019</u></a>	1/30/2019	6/15/2019
<a href="#"><u>051</u></a>	2/1/2019	6/17/2019
<a href="#"><u>066</u></a>	2/2/2019	6/18/2019
<a href="#"><u>086</u></a>	2/2/2019	6/18/2019
<a href="#"><u>068</u></a>	2/4/2019	6/20/2019
<a href="#"><u>007</u></a>	2/8/2019	6/24/2019
<a href="#"><u>067</u></a>	2/9/2019	6/25/2019