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Contraception Access Research Team – Contraception Cost-effectiveness Modeling (CART-CCM)



Surveyor Training Manual



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ABOUT THE SURVEY

Canadian Sexual Health Survey (CSHS) is a questionnaire used to collect data on sexual and reproductive health among women aged 14-49 years throughout BC. Unlike other countries, Canada has not collected information such as contraceptive method prevalence, adherence, intention for pregnancy, and proportion of population at risk of unintended pregnancy. The goal of the survey is to collect information to develop a Cost-Effectiveness Model to guide policy on family planning, contraceptive support and other reproductive health issues in BC, and for adaptation to Canadian provinces, territories and federal health jurisdictions.

This survey study is funded by Canadian Institutes of Health Research, Michael Smith Foundation for Health Research, and BC Women's Hospital, and conducted by Contraception Access Research Team (CART) at University of British Columbia Department of Family Practice. This study has been granted ethical approval by the Behavioural Research Ethics Board of UBC.

Principal Investigators:

Dr. Wendy Norman, MD, MHSc, CCFP, FCFP
Assistant Professor
Department of Family Practice, Faculty of Medicine
University of British Columbia
Scholar, Michael Smith Foundation for Health Research

Dr. Stirling Bryan
Professor
School of Population and Public Health
University of British Columbia
Director
Centre for Clinical Epidemiology and Evaluation

ROLE OF NURSE SURVEYORS

The participation of nurses into the study is critical to the efficient and high-quality completion of the survey. THANK YOU for helping with the conduction of Canadian Sexual Health Survey!

The nurse surveyors will be responsible for the administration of the Canadian Sexual Health Survey. Each surveyor will attend or call in to a day-long webinar session which will provide training for the successful completion of the survey tasks. Each surveyor will receive a copy of the comprehensive surveyor training manual before attending the webinar.

The study has a research coordinator who will answer questions and provide support to surveyors. If you have any questions or comments before, during or after administering the survey, please contact:

Eleanor Rushton, Research Coordinator
Contraception Access Research Team -CCM Project
Department of Family Practice, UBC
E204A – 4500 Oak Street, Vancouver, BC, V6H 3N1
Email: erushton@mail.ubc.ca
Telephone: 604-875-2424 ext: 4871
Cell Phone: 604-368-6184

THE SURVEY IS CONFIDENTIAL

No paper copies of the survey will be created. The survey will be conducted on a tablet which is connected to the research server and therefore once the responses are entered, they go directly to the server to be stored.

As no personal data for any participant will be stored on the Survey Tablet itself, nor could it be accessed by anyone finding or using the Survey Tablet, your main role in protecting this information comes with protecting your login and password. Please do not share your login credentials with anyone.

1. TRAINING REQUIREMENTS

All surveyors must complete the following before beginning to survey households and collect responses to the Canadian Sexual Health Survey:

- ✓ Review of Training Manual
- ✓ TCPS-2 Ethics Course – accessible here: <http://research.ubc.ca/ore/online-tutorials-training>
- ✓ REDCAP login and training
- ✓ Watch Mock Interview video
- ✓ Mock interview with Research Coordinator or other specified trained surveyor
- ✓ Sensitivity training – attend live training or watch video recording
- ✓ You must have a working cell phone to work as a Research Surveyor

PREPARATION FOR SURVEYING

1. Receive Materials

You will receive the following materials from the study's main office by courier (or pickup if in Greater Vancouver Area):

- ✓ One copy of the comprehensive surveyor training manual – PDF by email
- ✓ REDCap Survey System Login Information
- ✓ Huddle File Share Space Login Information
- ✓ Postal code areas that you will approach for administering the survey, with corresponding geographical maps of each postal code area, in which you should visit every household
- ✓ One iPad tablet, case and its charger
- ✓ One ID badge that has your name on it as a surveyor for this UBC study, that you will wear when conducting the survey
- ✓ One vest that has the logos of UBC and CSHS on it, that you will wear when conducting the survey
- ✓ One set of laminated numbered cards that will be used at each survey to assist the data collection
- ✓ Copies of the Survey Introduction Letter, to be dropped off at each household in the sample
- ✓ Copies of the Life History Calendar (blank)
- ✓ Copies of the participant resource card
- ✓ Copies of study brochure
- ✓ Cash honorariums (\$20 increments in sealed envelopes) for the 50 households in your assigned Local Health Area

2. Schedule Survey Administrations

You and another surveyor will work in team in the same neighbourhood at all times – you **MUST** be in the same neighbourhood while conducting interviews. You will get the partner surveyor's name and contact information through email. You and your partner will work together to make a schedule on when and where the survey will be administered; please consult with the research coordinator if scheduling is proving difficult. For the Greater Vancouver Area team, we will generate a schedule during training, and the surveyor schedule will be monitored by the Research Coordinator. Both of you will have to make sure that the partner surveyor's cell phone number has been programmed on speed dial in each other's cell phone, and to test it works well. "911" and the emergency contact number of the Research Coordinator should also be programmed on speed dial.

You must share your schedule of interviewing with the research coordinator prior to beginning the data collection and survey process.

3. Plan your Surveying Routes

Once you and your surveying partner have established periods of time to survey together, you must plan your survey routes. You will walk each route at least twice – once while delivering the letter of notice to each household in the selected postal codes, and once while administering the survey. You will drop letters, and then conduct a maximum of **7 attempts** at various times of day at each household to establish a completed survey with an eligible participant.

- i. Google Map Review: you will be provided with Google map screenshots of each selected postal code in your assigned area. Please review these maps prior to heading out into the community for the first time.
- ii. Planning your route: Plan your route from dropping off information letters by looking at the routes between each assigned postal code.
- iii. Record Keeping: While delivering letters to the potential households in each postal code, please record the addresses on the map form for each postal code. Record the addresses of all households, including basement suites. Once you have dropped all letters in your assigned LHA, you must submit your written address lists to the research coordinator, so that a master list can be created in Huddle for each LHA, and a record ID for each address. You can submit your list via email or fax (604-875-3895).

Letter drop off can occur at any time of day (during daylight hours only). Surveying hours should be varied, so that you are not making multiple attempts at each household at the same time of day.

Protocol for Apartments and other Locked-Buildings:

If there is an apartment building or locked building in your sample, please complete the following steps upon dropping off letters:

- Record the building name, and any management contact information on the Google map sheet
- Drop off letters to any accessible mailboxes
- If mailboxes are not accessible, please write down the unit numbers of each unit in the building, as well as the total number of units in the building.
- If the unit numbers are not listed or available, make a note of that and be sure to record contact information for building management

The Research Office will mail out a letter to each available unit. If unit numbers are not available, the research office will contact building management to see if it is possible to survey in the building.

- Once letters have been mailed out or building management has been notified, you will be able to survey the building.
- Please buzz each unit and briefly explain the survey to the recipient. Attempt to have them buzz you in so you can explain more at their door, and establish eligibility.
 - At the buzzer, please use the following as a guide: *Hello my name is _____, and I am from UBC conducting a survey on women's health. There is a \$20 honorarium. Would it be possible for me to talk to you more about the survey?*

4. Honorarium Tracking

You will receive an honorarium for each survey to be completed in your LHA (100 surveys per LHA). The honorariums will be labelled 001 to 100 for each LHA. For example, for the Burnaby LHA, the honorarium labels are – BB 001 to BB 100. When you complete a survey, please track the honorarium in the Huddle Spreadsheet by recording which honorarium you gave out at the respective address. Also ask for the participant's initials for receipt of the honorarium, and track those in the Huddle Spreadsheet. If the participant does not want to give their initials, they will still receive the honorarium.

SURVEY ADMINISTRATION AT PARTICIPANTS HOME

1. CART-CCM Recruitment Protocol and Safety Precautions When Conducting Interviews At Home

These guidelines are intended to establish a uniform approach to home recruitment, to assure privacy for the information shared by the participant, and to help assure the safety of CART investigators who will be conducting a one on one interview with study participants at their home.

PRIOR TO THE INTERVIEW:

- An introduction letter explaining the study, along with an information brochure including answers to frequently asked questions, the Study Information Card, as well as a toll free telephone number to the study team, to UBC Research Information Services and an internet link to the study web site with complete study information (and translated versions in Punjabi, Mandarin or Cantonese), will be delivered to a potential survey participant household one to four week(s) prior to the survey date.
- The cover letter will include information that the surveyor will be a nurse or other health professional.
- In neighbourhoods expected to have predominantly Punjabi, Mandarin or Cantonese speaking populations, the English cover letter and brochure will be accompanied by a copy of each in the language of the neighbourhood.
- Surveyors (health professionals) will work in teams of two in the same neighbourhood at all times.
- Surveyors will wear visually identifying vests with UBC and BC Women's Hospital logos, and carry photo identification specific to the study.
- Each Surveyor will carry a working cellular telephone, with "911" as well as the emergency contact number of the Research Coordinator, and of their Partner Surveyor programmed on speed dial. All surveys will be carried out within cellular coverage areas, as the Survey Tablets require cellular coverage to access the survey platform.
- Each Surveyor will carry the telephone number of a reputable local taxi firm.
- Each Surveyor will carry a phone card as a backup (in case the cell phone battery is dead).

AT THE HOME OF THE INTERVIEWEE:

SURVEYORS: DO NOT ENTER THE HOME:

- If you feel uncomfortable or unsafe.
- If you are required to carry out the interview in a bedroom.

IF THE SURVEYOR FEELS COMFORTABLE ENTERING THE HOME:

- When the surveyor attends to that household, they will identify themselves, the name and purpose of the study; surveyors should reference mailed out materials as a way of introducing the study. The surveyor will have copies of the invitation cover letter and survey brochures available, including translated versions, and will answer any questions at this time.
- Each surveyor will enter the time into the Screening and Tracking Tool via the Survey Tablet, at the time they approach a potential home to conduct an interview, the time when an interview commences, or select a check box for information on why it did not (no eligible household members, refusal to participate etc), and the time they leave the interview home.
- The surveyor will ask about members of the household present who may be eligible to participate in the survey and, if any, will select an eligible participant, over sampling for females under 30 years of age, and randomly selecting if there is more than one eligible participant.
- If the potential participant has further questions the surveyor will answer those. If not, the surveyor will ask if this would be an appropriate time for the interview. If not, the surveyor will arrange with the participant for an appropriate and mutually convenient time. Surveyor must ensure that the arranged time fits with the schedule made by the surveyor and his or her partner.
- If the participant is an emancipated minor or is over the age of 18, the surveyor will ask if the participant is ready for the interview, and if so the surveyor will provide and review the Study Information Card, answer any further questions, and ask if the potential participant consents to participate in the study. This answer will be recorded on the Survey Tablet.
- If the potential participant is a minor living at home, the surveyor will ask if there is a parent or guardian present to give consent and follow the same process. If the parent or guardian gives consent, the minor child will be asked if they give their assent, which if given will be similarly recorded.
- If the participant is over the age of 16 and is an emancipated minor (i.e. not living under the authority of their parents or guardian), the interviewer can ask the participant to consent to the study on their own behalf.
- If the participant is under age 19 and not an emancipated minor, and is unable to obtain parental consent, or unwilling to provide adolescent ascent, the interviewer will thank the potential participant and not return to this household.
- Once the participant has agreed to participate, the surveyor will indicate the interview should take place in a private setting. If one is available in the household (other than a bedroom) the interview will take place in that room while no other people are present, or could take place in a private setting outside the household or nearby. Should another person/household member enter the room or private setting, the interview will stop and resume after the other person has left. If the surveyor is not confident of the privacy or confidentiality of the interview due to its setting, the survey must request another setting or terminate the interview, to protect the participants privacy.
- Throughout the interview, the surveyor should respect any wishes of the participant to skip questions, for clarification, and/or to terminate the interview without coercion or pressure from the interviewer to continue
- Once the interview has concluded the surveyor will thank the participant, offer the participant the stated honorarium for their time and have them include their initials in the tracking

spreadsheet in the Huddle file sharing App. The surveyor will leave the participant with a copy of the study brochure, highlighting contact information if the participant has any questions

MONITORING SAFETY OF THE SURVEYOR:

- The Research Coordinator will monitor ongoing surveys such that a safety call will be made to each Surveyor not reporting “finished” within 1.5 hours (estimated survey time is 10-50 minutes). The RC will first contact the partner surveyor for more information.
- Each Surveyor will leave their cell/mobile phone **switched on (in vibrate mode) throughout** the interview.
- If the interview goes beyond the expected duration, each surveyor will interrupt the interview as soon as it is feasible and inform the research coordinator of the delay through an email update message, text message or telephone call.
- If the Surveyor is ever feeling unsafe or uncomfortable during the interview, they will take steps to leave the situation immediately. If the Surveyor has the flexibility to ask one last question (to make the exit less abrupt), ask the interviewee one last question; thank them politely for their time and leave. Record the incident using the tracking spreadsheet in the Huddle file sharing app..
- If the deadline passes and the Surveyor has not been in contact, the partner surveyor should ring the mobile phone of the Surveyor. If there is no answer, the partner should ring the surveyor again 10 minutes later. If still no answer, the partner should ring again another 10 minutes later (i.e. 20 minutes after the deadline) and call the Research Coordinator to provide an update. (NB: The partner surveyor is NOT to approach the location of last known contact). If there is still no reply after half an hour of the deadline, contact the police directly.

UNDER NO CIRCUMSTANCES WILL Surveyors EVER give their personal telephone numbers, addresses or email addresses to the interviewee.

IF THE PARTICIPANT KNOWS THE SURVEYOR:

Please review the neighbourhood with partner surveyor prior to beginning surveying – if either surveyor has an established personal relationship with an intended participant household, arrange for the other partner to visit that household. If you as the surveyor attend a household and there is a personal relationship or acquaintance between the participant and surveyor, please follow these steps:

- Ask the participant if they are comfortable continuing with the interview. Emphasize that there will be questions regarding sexual history, reproductive health care and pregnancy history, intentions and contraceptive choices. Emphasize that the participant can skip any questions that they choose and terminate the survey at any time.
- If the participant is not comfortable conducting the survey with you, offer that you can arrange for the other surveyor to conduct the interview, or that they do not have to participate in the survey.
- Thank the participant for their time, and follow up if appropriate with partner surveyor.

2. CART-CCM Response to Participant Disclosures When Conducting Interviews At Home

These guidelines are intended to establish a uniform approach to Surveyor responses to disclosures by participants, during one-on-one interviews with study participants at their home.

There are three cases which Surveyors should consider and be prepared to address:

1. The interviewee discloses that an offense has occurred for which there is an obligation for mandatory reporting (sexual assault of a minor, statutory rape, child abuse)
2. The interviewee discloses that an event(s) (For example: intimate partner violence or abuse) has/have occurred, or they fear will occur, for which they request protection, intervention or other assistance.
3. The interviewee discloses personal health information for which urgent or semi-urgent treatment or care should be provided.

PRIOR TO THE INTERVIEW:

- The surveyor will not ask questions of the participant that could require mandatory reporting.
- The surveyor will state, for all minor individuals who have consented/assented to participate, the general case of situations that would require mandatory reporting. This statement will be delivered after consent/assent, and prior to beginning the survey.
 - *“Before we begin, you should know that I am required by law to report to a social worker if I have reason to believe that you may be abused, neglected, or if for any other reason you may be in need of protection”*
- If the participant asks what will happen after the report, the surveyor will explain that the child protection social worker will (1) determine if the child needs protection; (2) contact the police if a criminal investigation is required; and (3) coordinate a response with other agencies, if necessary.
- The surveyor will start the interview once all questions of the participant have been answered.

If the Interviewee discloses a situation subject to mandatory reporting (1):

1. The Surveyor shall complete the survey with the participant.
2. At the conclusion of the survey, the Surveyor will thank the participant both for the survey and (ensuring that privacy is certain) for the disclosure.
3. The Surveyor will tell the participant that (the surveyor herself) will need to contact a child protection social worker because the situation the participant has disclosed is subject to mandatory reporting. After leaving the participant’s home, the surveyor will call the Helpline for Children, 310-1234 (toll free, a local telephone number anywhere in the province. No area code needed). It is not necessary to have details or proof prior to calling. But the surveyor will be asked for as much information about the concern as she can provide.

If the Interviewee is requesting protection or other assistance for abuse (2):

1. The Surveyor shall acknowledge the request, and finish the survey.
2. At the conclusion of the survey, the Surveyor will thank the participant both for the survey and (ensuring privacy is certain) for the disclosure/request.
3. The Surveyor will then offer the following additional resources to the participant (as listed on the Participant Resources Card)
 - VictimLink BC 1-800-563-0808 (victimLinkBC@bc211.ca <http://www.victimlinkbc.ca>)
 - Local Crisis line numbers (including local resources for Women’s Shelters, Youth Services, and Emergency Services)
4. If the participant requests assistance in preference to seeking support and assistance on their own, the surveyor will tell the participant that she will phone the VictimLinkBC on their behalf. After leaving the participant’s home, the surveyor will make the phone call and report the concerns.

If the Interviewee is requesting medical advice for health concerns (3):

1. If the interviewee has a medical emergency, the survey will be stopped and the surveyor will access, or assist family members if present to access, emergency services as appropriate (an ambulance or transportation to an emergency department).
2. If the interviewee has a medical question of a non-urgent nature, the Surveyor will acknowledge the question or request, and will request that the survey be completed prior to addressing the issue.
3. At the conclusion of the survey, the Surveyor will thank the participant both for the survey and (ensuring privacy is certain) for the request.
4. The Surveyor will then provide appropriate referral or information for the participant, which may include information on how to access local health services, and/or referral to the BC Nurse Health Line.
5. The Surveyor may be clear with the participant that they are not equipped to provide medical care, and are present today for the purpose of conducting the survey, and not in a health care provider role.

If answering the survey has caused distress or upset for the participant

1. If the participant requests to discontinue the survey due to the distress, the surveyor should do so immediately.
2. If the participant does not have such a request, but the surveyor acknowledges that the participant is distressed, the surveyor should inform the participant that she could withdraw from the survey at any point if she wishes, or choose to skip any question that she does not want to answer.
3. Before leaving the participant’s home, the surveyor should leave the contact information of a local certified counsellor or psychologist with the participant, in case she will have the need for a follow-up care. (Please refer to the attachment file “List of local counsellors and psychologists” for contact information). In addition, the surveyor should provide the participant the following information of contact for general resources, if she wants:
 - SexSense toll free (run by Options for Sexual Health): 1-800-739-7367
 - BC Nurse Line toll free: 811

TECHNICAL ASPECTS OF SURVEYOR TRAINING

The following is a summary of using the iPad, Huddle and RedCap, for more details are pictures see the Powerpoint Slides

1. INTRODUCTION TO USING THE iPad

- a. General functionality of the iPad
 - i. To open an app, click on the app's icon on the home screen
 - ii. To exit an app, click on the home button to return to the main screen
 - iii. To switch between apps, either return to the home screen and click on the new app or double click the home button, then swipe left or right to locate the desired app, and tap the app to switch to it.
 - iv. When using the keyboard, tap the uparrow button in the bottom left hand corner to capitalize a letter.
- b. Important apps and webpages for surveying:
 - i. Huddle App
 - ii. Quick Office App
 - iii. RedCap Webpage

2. USING HUDDLE.NET FILE SHARING APP

The Huddle app is used to securely share files and will be used to access the address spreadsheets and maps you will need to survey.


- a. To open Huddle, tap the icon's app located on the dock at the bottom of the screen
- b. Sign in using your Huddle username and password
- c. To access the LHA folder, first click on the 'Files' tab at the bottom of the screen. Next click on 'CART-GRAC' under the Browse by Workspace heading. Select the 'PHSI-CART CCM' folder, then the 'VCH' folder, then select the folder for the region you are sampling e.g. 'Westside'. Here you will find the Address Spreadsheet; however, all files in Huddle are view only, so you will need to open the file in the Quick Office app in order to edit it.
- d. Maps and Record IDs can be found under 'Surveying Materials' in the 'PHSI-CART CCM' folder.
- e. Each specific spreadsheet has a list of addresses, and a column for each attempt, for the survey, the honorarium tracking log, and a column for comments. The following code system is used to code each attempt at a household:

Attempts Legend

- 0 No Answer, attempt again
- 1 No one eligible, no further attempts
No one interested, no further attempts
- 2 attempts
- 3 Return to House
- 4 Successful Completed Attempt

3. QUICK OFFICE

Quick office will be used to open Huddle Files in order to edit them. Once you have finished editing the file, you will save the file back to Huddle. Do not save any files in Quick office as this will store them on the iPad, and no information should be stored on the iPad.

- a. You may need to sign into Google in order to access Quick Office. Use the CSHS gmail account to sign in using the following: cshs.cart@gmail.com and password: Contraception. Then click 'Accept' for the terms of using the app.
- b. To open a Huddle file in Quick Office, have the file opened in Huddle, then click on the export icon (it looks like this ) and then click 'Open in Quick Office'
- c. Once opened in Quick Office, you can now edit the spreadsheet by double tapping on a cell and entering in data or comments.
- d. To save the file once you are done editing it, click the 'Close' button in the top left hand corner of the screen. Select 'Save Back' and then choose 'Open in Huddle'. Click 'Save version' to replace the previous version of the file with the new one, then click 'Done'. The Huddle app will now be open so you may need to switch back to the Quick Office app if you want to continue editing the spreadsheet. It is a good idea to periodically save the spreadsheet while you are working so that your partner knows which houses you have already visited.

4. UNDERSTANDING REDCAP – SURVEY ADMINISTRATION TOOL

- a. To open RedCap, first open the Google Chrome app located in the dock at the bottom of the iPad screen.
- b. Go to rc.cfri.ca or find it in the bookmarks and login using your username and password
- c. Under the 'My Projects' tab, click on the Project Title 'Contraception Access Research Team – Contraception Cost-effectiveness Modelling: Sexual Health Survey'

- d. On the left hand panel, select Add/Edit Records
- e. Choose the Record ID that corresponds to the address you are surveying (you can find the Record IDs for each address on the LHA spreadsheet in Huddle).
- f. Select Attempt 1 before approaching a house in order to track your arrival at the doorstep and whether someone answered the door and is eligible.
- g. If eligibility is established, complete the Attempt 1 record, and click 'Save Record'
- h. Click on the Survey bubble to open the survey.
- i. Select the 'Open Survey' button at the top right hand corner to open the survey in the survey mode in a new tab.
- j. Close the RedCap tab so that when you hand over the iPad to the participant, they will not be able to access any data through RedCap.
 - k. Click to Save the survey once completed.

SURVEY COMPLETION

DAILY RESPONSIBILITIES

- During the day, you can complete your record keeping on a paper version of the LHA specific huddle spreadsheet.
- After each day of surveying, review the Huddle LHA Specific Spreadsheet and update any changes from surveying during the day, to ensure you have accurately completed your records. Also confirm that you have submitted all Canadian Sexual Health Surveys in the REDCap system.
- Accuracy is important as this is how we determine the length of survey administration, number of refusals and contract payment.

UPON COMPLETION OF 100 SURVEYS IN ASSIGNED LOCAL HEALTH AREA

- Once your surveys are completed, notify the Research Coordinator that you have completed all surveys.
- You will receive a FedEx account number that can be used to courier back the study materials
- Check against the following list for the materials that should be included in the package:
 - ✓ The tablet and its charger
 - ✓ The ID badge that has your name on it as a surveyor for this study
 - ✓ The survey vest
 - ✓ The surveyor training manual
 - ✓ The list of residential households that you have approached for administering the survey
 - ✓ The laminated numbered cards that have been used at interviews
 - ✓ Remaining copies of blank calendar history card
 - ✓ Remaining copies of honorarium receipt log form
 - ✓ Remaining copies of participant resource card
 - ✓ Remaining copies of study brochure
 - ✓ Remaining honorarium

Send the package by tracked mail to:

BC Women's Hospital
E208 – 4500 Oak Street
Vancouver, BC, V6H 3N1
Attention: Eleanor Rushton

APPENDIX 1 – PARTICIPANT RESOURCE CARD

General Resources

- SexSense toll free: 1-800-739-7367
- BC Nurse Line toll free: 811

For Protection and Other Assistance for Abuse

- VictimLink BC: 1-800-563-0808
victimLinkBC@bc211.ca
<http://www.victimlinkbc.ca>
- Local Crisis line numbers: (including local resources for Women’s Shelters, Youth Services, and Emergency Services) (This will be sorted out when the sampling frame has been decided)

Resources for Youth

- Kids Help Phone Line: 1-800-668-6868
- BC HelpLine for Children: 310-1234
- Native Youth Crisis Hotline: 1-877-209-1266
- Online Resources and Support: youthinbc.com