



INSTRUCTIONS FOR THE BHFU SURVEILLANCE DISPOSITION (DSPBS) FORM

I. General Instructions

The BHFU Surveillance Disposition Form documents how and when a participant has completed the BHFU Surveillance study. Complete the form for study participants (PPT) to document their final status in the study. Note, contact ARICHELP@unc.edu for instructions on updating the DSPBS when a PPT has withdrawn consent and then wishes to return to the study.

The data entry on this form should be started as soon as the site is made aware of a disposition status, especially when the participant has withdrawn consent, discontinued due to an adverse event other than death or died. In that instance, complete date, staff code, and questions 1 through 2. Question 3 should remain blank until the site has completed all data entry. See instructions for DSPBS3 for more information.

II. Detailed Instructions for Each Item

- 0a. Enter the date the DSPBS is completed.
- 0b. Enter the staff ID for the person who completed the DSPBS.
- 1. Enter the date of disposition. The date is the last day of participation in the study or the last day of most data collection.
- 2. Choose one disposition category.
 - A=Withdrew consent
 - If a PPT withdraws consent, the date of disposition is the date the PPT notifies the site of their intention to discontinue. Examples: the date from a letter of withdrawal notification, or the date the PPT telephones or emails the site to inform them of the withdrawal.
 - B=Participant lost to follow-up
 - The date of disposition for a PPT lost to follow-up is the last date of contact with the PPT.
 - C=Death
 - The date of disposition for a PPT who dies is the date of death. Deaths are also recorded on the AER form in the ANX Adverse Events form group.
 - D=Discontinued study due to adverse event other than death
 - The date of disposition for a PPT who discontinues due to an adverse event is the later of the 2 dates, adverse event date when no additional data is collected from the PPT, or the last date that data is collected on the PPT. Adverse events are also recorded on the AER form in the ANX

Adverse Events form group.

E=Completed study

- Most PPTs will be categorized as completing the study. The date of disposition is the last day of data collected on the PPT. Only complete this field after all items from the completion list have been addressed:
 - If relevant, complete all Informant Interviews and enter data into CDART.
 - Resolve all queries returned from the CDART Form Data Queries Report.
 - Resolve all missing fields returned from the CDART Missing Fields by ID and Form Group reports.
 - Resolve any outstanding manual queries that have been assigned by reviewers.
 - Set missing forms from partial visits to Permanently Missing in the CDART form grid.

2a. If option 'C' is selected, enter the date of the participant's death. All deaths must be recorded on the AER form in addition to the DSPBS.

2b. If option 'C' is selected, enter the cause of the participant's death.

2c. If option 'D' is selected, enter the date of the participant's adverse event. All adverse events must be recorded on the AER form in addition to the DSPBS.

When a PPT has completed, withdrawn, or died, the PI needs to review and sign off that the data collection is complete. In order to close out the data collection for a PPT, the study site staff should:

- a. Carefully review all data collected up through the disposition date.
- b. Run all query reports to look for missing fields and missing forms. Mark any uncollectable, but expected, forms as permanently missing on the form grid.
- c. Verify all data has been entered into CDART.

3. When all data has been entered and reviewed, the site will enter 'No' for DSPBS3. Leave the field blank until the review is **final**. Entering 'No' in DSPBS3 will be used as a trigger for the PPT's subject ID to show up on the PI DSPBS Sign-off Report in CDART. Sites will have access to this report so they can confirm that a PPT's data collection is final and available for the PI to review.

The principal investigator will run the PI DSPBS Sign-Off report periodically to be informed of needed data reviews from PPTs who have come to the end of the study. This includes PPTs who have died or withdrawn. If questions arise from the PI data review, DSPBS3 will remain 'No' and the PI will notify the site about their concerns. The site should address the concerns and notify the PI when the data has been updated or an explanation has been provided to the PI. If satisfied with the data review, the PI updates DSPBS3 to 'Yes.' Save and Close the form (bottom right).

PI only: Lock the form in the form grid by clicking the LOCK icon.