

RISE

SOP for Rescheduling Study Visits

Author(s): C. Duerr, A. Hassan & M. Preisigke

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Purpose:

This SOP describes steps to take in the event of missed RISE visits.

[Appendix: Visit Windows Table](#)

Important Notes

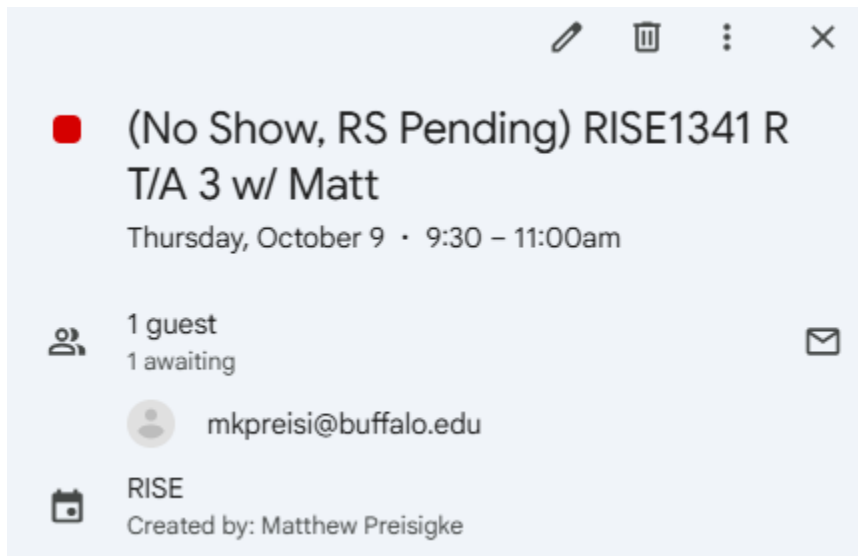
- Ideally, all participants (PPTs) would show up to their scheduled visits on time and complete the visits with no issues. However, this is unlikely to happen all of the time! The following instructions will guide you through the process for handling times when the participant doesn't show up for the visit.
- NOTE that most of the examples are for Intake visits but similar guidelines apply to other visits. When other visits have different procedures, these are noted.
- See APPENDIX A for a table of reschedule windows and other important notes

Attempting to Reschedule

1. Wait for 10 minutes after the scheduled start of the visit for the PPT to arrive or join Zoom
2. If the PPT has not shown up by that point, call them to see if they can still attend the visit
 - a. You will have to consider other visits that are scheduled to happen that day and determine how long you can wait for them to arrive
3. If the PPT does not answer, and you ARE able to reschedule again, leave a voice mail inquiring about their attendance and provide an alternative visit time; you can also send a follow-up email or text with this information if that is the PPT's preferred method of contact
4. If the PPT has not shown and this is their **LAST reschedule attempt**, leave voice mail letting them know that today is the final chance to attend the visit and to please call back as soon as possible; you can also send a follow-up text or email with this information if that is the PPT's preferred method of contact
5. The Visit Status form should be updated from "Scheduled" to "Reschedule Pending"; add a note to the Visit Status form in the following format (this is just an example):
 - a. "11/11/25 MP: No show. Called 10min after visit time, LVM & text. Next contact, 11/12."

The screenshot displays two versions of the 'Intake Status' form side-by-side. The left form shows the 'Intake Status' dropdown menu set to 'Scheduled', which is circled in red. The right form shows the same dropdown menu set to 'Reschedule Pending', also circled in red. To the right of these forms is a section titled 'Current Intake schedule number:' with three radio button options: '1st time scheduling' (selected), '1st time rescheduling', and '2nd time rescheduling (or beyond)'.

6. On the Google Calendar, change the visit color to RED and add a note regarding what happened (see below for example)



7. Removing visits from the Google calendar

- a. Typically visits should NOT be removed from the Google calendar – the calendar information is a valuable tool for tracking visits
- b. Add a note to explain what happened and change the color to RED if the visit didn't happen
- c. Exceptions:
 - i. If someone attended Intake and scheduled all their visits then they withdrew (actively or passively) from the study . . . in that situation, all their subsequent visits should be removed from the calendar
 - ii. If PPT reschedules T/A 1 or 2, requiring the rescheduling of all subsequent visits, delete the originally scheduled visits from GCal and enter new dates (once they have been rescheduled)

8. Attempts to reach the PPT and get the visit rescheduled should be made according to the following guidelines:

- a. Number of calls per visit:
 - i. Intake:
 1. Intake must be completed within 45 days of Phone Screen
 2. We make 4 contacts in the first week + 1 contact per week afterward, until the 45-day deadline has been reached
 - ii. T/A 1:
 1. T/A 1 must be completed within 45 days of Intake
 2. We make 4 contacts in the first week + 1 contact per week afterward, until the 45-day deadline has been reached
 - iii. T/A 2 – T/A 4: up to 5 calls
 - iv. T/A 5: 4 in the first week and 1 in each of the next 4 weeks
- b. Timing of contact attempts

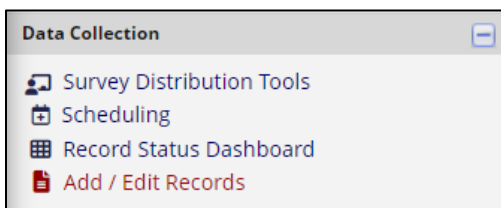
- i. Attempt 1 should be made on the day of the visit, 10 minutes after the scheduled start time
 - ii. Attempt 2 should be made 1 business day after the scheduled visit
 - iii. Attempt 3 should be made 3 business days later (the day before 1 week has passed)
 - iv. Attempt 4 should be made one week after the date of the initial visit
 - v. After making the 4 attempts noted above, check in weekly with the PPT through the week of that visit's deadline
- c. Example:
- i. Intake originally scheduled on Tuesday, May 20 at 1PM
 - ii. Attempt 1 - on 5/20 at 1:10PM
 - iii. Attempt 2 - on 5/21 at a different time of day
 - iv. Attempt 3 - on 5/27 at a different time of day than the last two attempts
 1. NOTE that this attempt would normally have been done 3 business days after the last one BUT that date fell on the Memorial Day holiday, so you go to the next business day
 - v. Attempt 4 – on 4/9 around time of original visit
- d. Attempts can be a combination of calls, texts, and emails with priority given to the PPT's preferred method of contact
- i. **If the deadline for the visit being rescheduled is within one week**, inform the PPT of when that is: **“We have up until (day, date) to complete this visit.”**
- e. Make sure to document these call attempts in the “Visit Status” notes for the visit.
- i. Put the date, your initials, and a note (including the contact time, type, and date of next RS contact attempt).
 1. e.g., “10/10/25 MP: RS call made @ 11am - LVM, email, text. Next contact, 10/15.”
 - ii. In the example below:
 1. The PPT's preferred methods of contact were phone call and text
 2. In this example, PPT was never reached in 7 attempts

T/A 5 Status Notes:

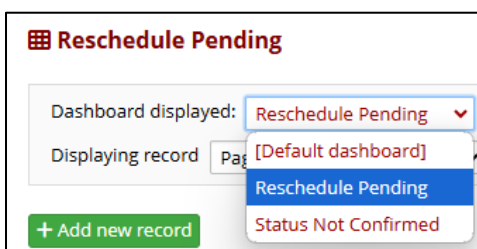
4/3/26 AH: status = missed
 03/30/26 MP: Final RS call made @ 9:35am - LVM, email, text.
 3/25/26 AH: RS call @ 3pm - LVM, text. Next and last contact, 3/30.
 3/17/26 AH: RS call @ 11:46am - LVM. Next contact. 3/25 (try in afternoon, after 2pm).
 3/13/26 AH: RS call made @ 1:16pm - LVM, text. Next contact, 3/17.
 03/12/26 MP: RS call made @ 10:20am, LVM. Next contact, 3/13.
 03/09/26 MP: RS call made @ 10:40am - LVM, email, text. Next contact, 3/12.
 3/6/26 AH: NO Show, called 10 min after visit time - LVM, text. | status = RS Pending
 03/05/26 MP: RC made - LVM, email, text.

9. Procedures for “Reschedule Pending”:

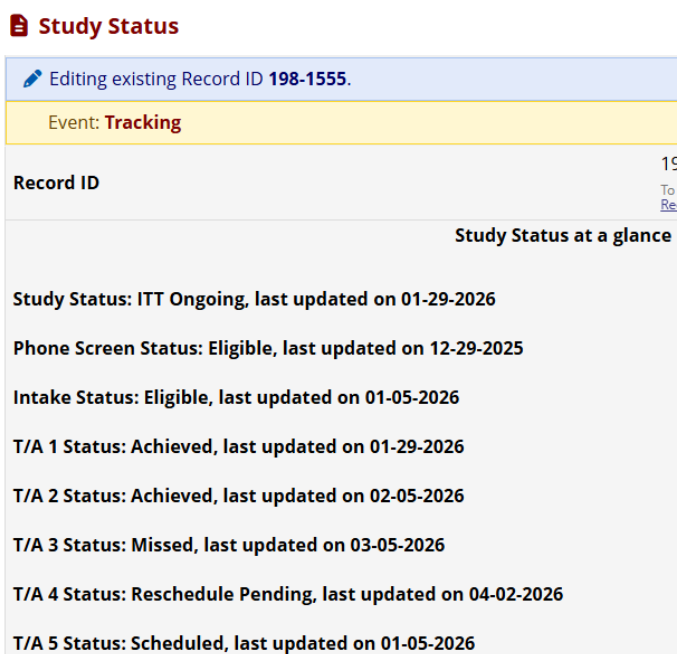
- a. Go to the Record Status Dashboard within the RISE Project on REDCap



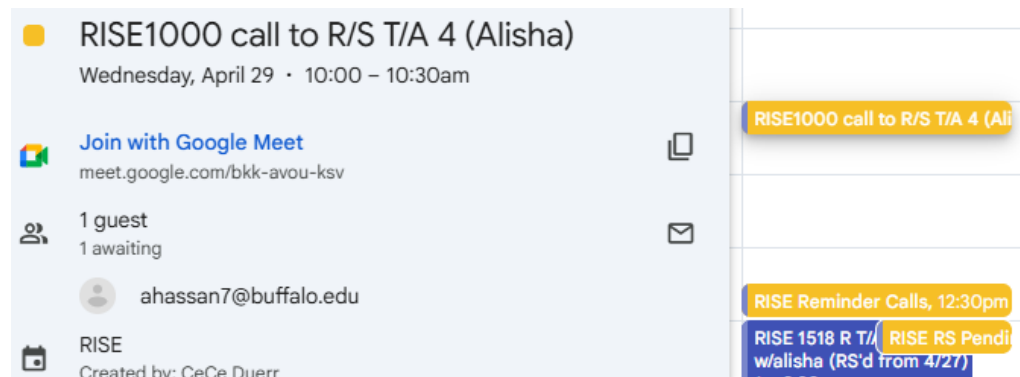
- b. Click the dropdown on the dashboard and select “Reschedule Pending”



- c. On the Reschedule Pending dashboard, you will work your way down the list to contact PPTs who need to be rescheduled
- d. For each record:
- Open Study Status
 - Scroll down to determine which visit the PPT missed
 - The status for that visit will say “Reschedule Pending”
 - Sometimes visits will have status notes that say the PPT is scheduling this visit at the visit that precedes it – if that is the case, you do not need to call them



- e. Determine the date and time of the visit they missed within that Visit Status form, then go to Contact Info form and call the PPT
- f. If the PPT answers, introduce yourself and tell them why you are calling
- g. If the PPT says . . .
 - i. No longer interested, say “May I ask why not?”
 1. Record their response in the notes section of the Visit Status form for that specific visit
 2. Update Study Status (copy your note from Visit Status and paste it in the notes section here as well)
 3. Milestone accordingly (refer to
 - a. If prior to T/A V1, PPT should be counted as “Pre-ITT”
 - b. If after T/A V1, PPT should be counted as “ITT”
 - ii. Don’t have time to speak now:
 1. Determine a good time to call the PPT back
 2. Make a Google Calendar event for that day and time



- iii. Yes, I have time to speak now, find a day/time to reschedule the visit based on RISE staff and PPT availability
 1. If the deadline for the visit being rescheduled is within one week, inform the PPT of when that is

10. Once the visit is rescheduled:

- a. Change the Visit Status back to “Scheduled”
- b. Enter the new visit date and time
- c. Update “current [visit] schedule number”
- d. Enter the current date and your initials in the Visit Status update fields towards the bottom of the form.

Visit Status

Editing existing Record ID **257-3**.

Event: **Intake**

Record ID 257-3

Intake Status

Intake Status:

Scheduled

Date and Time of Intake scheduled during the Phone Screen: **04-02-2025 15:00**

45 Day Deadline to complete Intake based on Phone Screen on 03-26-2025 14:00: **05-10-2025**

Date of Intake from most recent scheduling:

* must provide value

04-15-2025 Today M-D-Y

Time of Intake from most recent scheduling:

* must provide value

15:00 Now H:M

Current Intake schedule number:

☐ 1st time scheduling
☒ 1st time rescheduling
☐ 2nd time rescheduling (or beyond)

reset

Intake Status Notes:

04/14/2025 AH: RS pending call at 1pm, spoke with PPT - Visit RS'd from 4/2/25 @3pm to 4/15/25 @3pm.
 04/09/2025 MG: RS pending call at 3pm, LVM and text
 04/08/2025 MG: RS pending call at 9am, LVM
 04/03/2025 MG: RS pending call at 12pm, LVM and text
 04/02/2025 MG: Called and LVM at 3:10pm. No-show as of 3:20pm, status = "Reschedule Pending"

Date of most recent update to Intake Status:

04-14-2025 Today M-D-Y

Staff username:

AH

11. If and when the visit is rescheduled, add the new visit date/time to the Google calendar with a note saying when it was rescheduled from (see below)

RISE1370 IP IN w/ Matt (RS from 10/16)

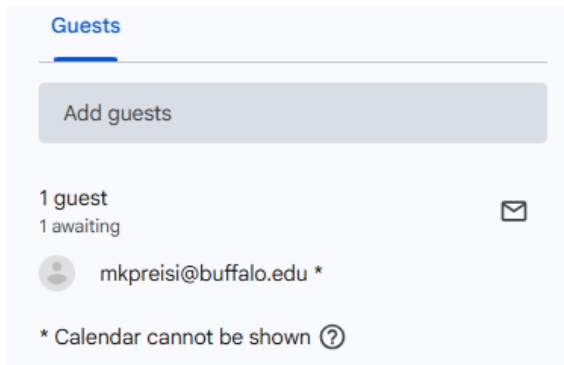
Thursday, October 23 · 9:00 – 11:00am

1 guest
1 awaiting

mkpreisi@buffalo.edu

RISE
Created by: Matthew Preisigke

12. Always be sure to send an email from the Google calendar to the RA running the visit by entering their email address under “Guests” (see image above)



13. If a visit was not rescheduled after the requisite number of attempts/before visit deadline:
- For Intake visits:
 - Update Intake Visit Status to “Missed”
 - Update Study Status to “Pre-ITT LTFU at Intake” (this is a passive refusal)
 - For T/A 1:
 - Update T/A 1 Visit Status to “Missed”
 - Update Study Status to “Pre-ITT LTFU at T/A 1”
 - For T/A 2 – 5:
 - Update that Visit Status to “Missed” (do not change future visit statuses)
 - Study Status stays as “ITT Ongoing” until after T/A 5 window closes OR someone actively withdraws or is withdrawn
 - If they miss consecutive visits including T/A 5, their Study Status should reflect LTFU at the first of the consecutive missed visits.
 - E.G., PPT misses T/As 3, 4 & 5: Study Status = ITT LTFU at T/A 3. T/A 3-5 Visit Status’ = Missed
 - Leave the “Study status checked by coordinator” box unchecked – the coordinator will check the box and save the form complete
 - If a PPT withdraws / is withdrawn:
 - Ensure the subsequent visit statuses are blank
 - Make a note in each Visit Status Note box, including the date, RA initials, stating this visit status has been blanked out and why
 - Remove their upcoming scheduled visits from the Google calendar
14. See [Appendix A](#) for the maximum number of times a visit can be rescheduled if someone no-shows to the visit vs. actively reaches out to reschedule

APPENDIX A: Table of Reschedule (RS) Windows for RISE Above Smoking

[Finalized on 4/4/2025 by Dr. Hawk, Dr. Mahoney, and CeCe]

	Screen	Intake	T/A V1	T/A V2 (TQD)	T/A V3	T/A V4	T/A V5
Weeks from ITT	~-2	~-1	0	1	3	9	13
Max # of RS if ppt no shows?	1 (ppt can reinitiate)	1 (ppt can reinitiate)	2	2	2	2	3
Max # of RS if ppt reschedules ?	2 (ppt can reinitiate)	2 (ppt can reinitiate)	2	2	2	2	3
Time window	N/A	Must be completed w/in 45 days of phone screen. If not, milestone as “missed”	Must be completed within 45 days of Intake. If not, milestone as “missed”. If ppt reschedules, then dates for T/A V2-V5 need to be adjusted	Initial schedule 1 week post T/A 1 Reschedule within 2 weeks of nominal V2 date If ppt reschedules, then dates for V3-V5 need to be adjusted	Initial schedule 2 weeks post T/A 2 Reschedule within 2 weeks of nominal V3 date If ppt reschedules, dates for V4, V5 DO NOT CHANGE	Initial schedule 8 weeks post T/A 2 Reschedule within 2 weeks of nominal V4 date If ppt reschedules, date for V5 DOES NOT CHANGE	Initial schedule 12 weeks post T/A 2 Reschedule within 4 weeks of nominal V5 date