
Survey Research Operations

Monthly Project Report

Sponsored Data Collection Projects and Development Initiative

April 2023



Sponsored Data Collection Projects and Development Initiative Projects

(AFHS) American Family Health Study
(AFHS-Additional work) American Family Health Study - additional work
(BFY) Baby's First Years
(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries
(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military
(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022
(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey
(DCUS) Daily Cannabis Use Study
(ECHO (Year 7)) Environmental Influences on Child Health Outcomes
(EDC-Endline) Every Dollar Counts Endline
(HCAP 2022) Healthy Cognitive Aging Project, 2022
(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)
(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews
(HRS HOC) Health and Retirement Study – Historical Occupation Coding
(HRS2022-Screening) HRS 2022 - Screening
(IHDS3) India Human Development Survey Wave 3
(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study
(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027
(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027
(PR-PSID) Puerto Rico Panel Study of Income Dynamics
(PSID CDS 2023) PSID Childhood Development Supplement 2023
(PSID23) Panel Study of Income Dynamics Core 2023
(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update
(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss
(SAME) Skills Assessments Mode Evaluation Study
(SCA 2023) Surveys of Consumer Attitudes
(SRS 2021) Social Relations 2023
(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study
(TSME 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)
(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)
(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023
(TSME23 SRO Web Admin Migration (483257)) TSME23 SRO Web Admin Server Migration (483257)
(TSME23-PIPPA) PIPPA 2.0 (425198) FY23
(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)
(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS

Sponsored Projects Dashboard

NonArchived Sponsored Projects							
Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr
<i>AFHS</i>	Sponsored	Closing	Rebecca Gatward	🟢	🟢	🟢	🟢
<i>AFHS-Additional work</i>	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟢
<i>BFY</i>	Sponsored	Implementing	Piotr Dworak	🟢	🟢	🟢	🟢
<i>BHM Library Project</i>	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟡	🟡
<i>CARE Military</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢
<i>CARE SALTOS MTEC</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢
<i>CRUSE - AHDfS</i>	Sponsored	Implementing	Piotr Dworak	🟢	🟡	🟢	🟢
<i>DCUS</i>	Sponsored	Planning	Gary Hein	🟡	🟢	🟢	🟢
<i>ECHO (Year 7)</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟢	🟢	🟢	🟢
<i>EDC-Endline</i>	Sponsored	Implementing	Karin Schneider	🟢	🟢	🟢	🟢
<i>HCAP 2022</i>	Sponsored	Implementing	Maureen Joan O'Brien	🟡	🟡	🟡	🟡
<i>Health and Well Being in SE MI</i>	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴
<i>HRS 2022 Panel & Baselines</i>	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡
<i>HRS HOC</i>	Sponsored	Planning	Gloria J Baker	🟢	🟢	🟢	🟢
<i>HRS2022-Screening</i>	Sponsored	Implementing	Evanthia Leissou	🟡	🟡	🟡	🟡
<i>IHDS3</i>	Sponsored	Implementing	Sarah Elisa Broumand	🟡	🟡	🟡	🟡
<i>MI CReSS (Year 3)</i>	Sponsored	Implementing	Sarah Elisa Broumand	🟢	🟢	🟢	🟢
<i>MTF Base Year 2022_27</i>	Sponsored	Implementing	Rebecca Gatward	🟢	🟢	🟢	🟡
<i>MTF Panel 2022-27</i>	Sponsored	Implementing	Donnalee Ann Grey-Farquharson	🟢	🟢	🟢	🟢
<i>PR-PSID</i>	Sponsored	Implementing	Shonda R Kruger-Ndiaye	🟡	🟡	🟡	🟡
<i>PSID CDS 2023</i>	Sponsored	Initiation	Piotr Dworak	🟡	🟢	🟢	🟢
<i>PSID23</i>	Sponsored	Implementing	Rachel Anne Orlowski	🟡	🟡	🟡	🟡
<i>PSID23 Online Contact Update</i>	Sponsored	Closing	Camila Kendall	🟢	🟢	🟢	🟢
<i>QoL & Hearing Loss</i>	Sponsored	Implementing	Margaret Lee Hudson	🟢	🟢	🟢	🟢
<i>SAME</i>	Sponsored	Implementing	Hongyu Johnson	🟡	🟢	🟢	🟡
<i>SCA 2023</i>	Sponsored	Initiation	Theresa Camelo	🟢	🟢	🟢	🟢
<i>SRS 2021</i>	Sponsored	Implementing	Barbara Lohr Ward	🔴	🔴	🔴	🔴
<i>STARRS-LS Waves 3 & 4</i>	Sponsored	Implementing	Meredith A House	🟢	🟢	🟢	🟢

Project Name	(AFHS) American Family Health Study		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,596,238.00	Indirect Budget: 893,895.00	Total Budget: 2,490,133.00
Principal	Brady West (Survey Research Center)		
Investigator/Clients	William Axinn, Mick Couper and James Wagner (Survey Research Center)		
Funding Agency	National Institutes of Health (NIH)		
IRB	HUM#: 00167171	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study.</p> <p>We plan to screen around 42,120 randomly selected U.S. households by mail and web to identify an eligible population (aged 18-49 years). The screening work will be divided across two successive nine month periods (n=21,060 per effort). Each 'replicate' is a fully representative sample of U.S. households. Eligible respondents will be invited to complete three modules of content (administered separately or one instrument), either online or a paper questionnaire. The plan is obtain at least one returned module from 4,000 respondents.</p> <p>There will be a two month gap between replicates. The first replicate will begin in September 2019 and the second in around July 2020.</p> <p>The sample (addresses) will be selected via Market Systems Group (MSG). The following response assumptions have been made: at the screening stage, we estimate a response rate of 50% (around 21,000). Of these we expect approximately 12,000 addresses to contain an eligible person. In households with more than one eligible person we will randomly select one person.</p> <p>The contact protocol for the screener and main data collection is designed to, initially, push completion by web. Addresses or selected participants will only be mailed a paper screener or questionnaire after reminders encouraging completion online. This is a recent change to the protocol and was made after the SRO budget proposal was provided to the PI.</p> <p>The main interview consists of three modules which will replicate almost all NSFG content. The PI group is leading the process of reviewing and translating the content to web format and will provide specifications for programming to SRO.</p> <p>The following revisions have been made to the study design as detailed in the latest budget proposal (SRO scope of work);</p> <ul style="list-style-type: none">o We will use an external vendor to scan returned paper screeners, rather than manual data entry. This vendor will also format the paper forms, print materials and be responsible for most of the respondent mailings.o The original study design did not include web as a mode of data collection for screening. Additional funding from SRC has been obtained by the Principal Investigator to cover the development of a web screener and associated data management and reporting costs.o Telephone reminder calls remains one of the steps in the non-response protocol for the main data collection. However, it is likely that this effort will be targeted to a subset of the selected sample, rather than across the entire sample.o The amount budgeted for the TOA for the screener was \$2 and \$5 – 50% of the sample to receive each amount. The TOA amount will now be \$2 for the full sample. We may provide an additional TOA of \$5 to a subset of the non-responders as part of one of the follow-up reminder mailings (depending on available budget).o The eligibility age range for the study has been changed from 15-49 to 18-49. This eliminates the need to contact to parents/guardians of all eligible respondents who have not reached the age of majority to gain consent to participate in the study. There are three states where the age of majority is above 18 years of age – in these states we will adjust the selection protocol as necessary.o A further change to the study protocol is around completion of the main modules. In some circumstances we will provide Respondents the option to move directly to complete the main modules after completing the screener without being sent an invite in the mail/email to do so. This will only happen if the selected R is also the person who completed the screener.o An experiment around completion of the modules has been introduced to the protocol. Twenty per cent of the selected eligible respondents will be invited to complete the full 60 minute survey as one instrument, rather than completing three separate modules.		
SRO Project Period	01/2019 - 03/2022		
Data Col Period	05/2020 - 04/2022		
Security Plan	NA		

Milestones	<div><div>Pre Production Start: 09/01/2018</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start: 04/21/2020</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End: 04/30/2022</div></div>			
Other Project Team Members	SRO Team: Andrew Hupp, Laura Yoder, Rose Zdybel, Lloyd F Hemingway, Jim Rodgers, Colette Keyser, Deb Wilson, Wen Chang			
Other Project Name	During the budget proposal stage this project was known as 'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.			
Sample Mgmt System	MSMS			
Data Col Tool	Blaise 5			
Hardware	Desktop			
DE Software	Other (Blaise 5 (for Mail questionnaires)); External vendor (TBD)			
QC Recording Tool	N/A			
Incentive	Yes, R			
Administration	SRO Group			
Payment Type	Check, post (Modules 1 - \$20, Module 2 - \$20 and Module 3 - \$30); Cash, prepaid (Screener IW - \$2 Potentially \$5 for a subset during NR follow-up)			
Payment Method	Check through STrak RPay System; Check through other system (Info. from MSMS and transfer information via Excel spreadsheet); Imprest Cash Fund from ISR Business Office (Info. from MSMS and transfer information via Excel spreadsheet)			
<div></div>				
Report Period	Apr, 2023 (AFHS)		Closing	
Risk Level	On Track			
Monthly Updates	April update Since last month the overspend on the main AFHS project decreased due to a refund for voided cheques. Current SRO focus: Any hours spent on AFHS tasks (projected just for Me, Colette and Dean) are being charged to the AFHS Feasibility budget. These are reported on separately in MPR.			
Special Issues	The additional scope (panel feasibility and non-response follow-up) will be funded using sequestered funds (on a separate short code). The PI group have also agreed to fund the overspend on the main AFHS budget.			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):		2,508,062.32	
	Est Cost at Completion (E\$AC):		2,508,062.32	
	Total Budget:		2,490,133.00	
	Variance (Total Budget minus- E\$AC):		-17,929.32	
	Reason for Variance:	April 2023 update - Since last month the overspend on the main AFHS project decreased by \$210 (direct) due to a refund for uncashed cheques. This overspend will be funded using sequestering funds.		
Projections as of May 15, 2023	Dollars Projected for Month:		0.00	
	Actual Dollars Used:		-327.40	
	Variance (Projected minus Actual):		327.40	
	Reason for Variance:	Any additional spend will be charged to the short code for the 'AFHS additional work' - the overspend from the main AFHS and the additional work are being funded by sequestering funds. The overspend is decreasing due to reversed respondent checks that were issued 12 months ago and not cashed. Between March - April the overspend decreased from -\$18,256.72 to -\$73,288.25		
Measures		Units at Complete	RR	HPI
	Current Goal:	2000 (main IWs)	33.3%	NA
	Goal at Completion:	4000	33.3%	NA
	Current Actual:	2369	64%	NA
	Estimate at Complete:	2369	64%	NA
	Variance:	1631	+21% (see below)	NA
Other Measures				

Project Name	(AFHS-Additional work) American Family Health Study - additional work		
Project Mode	Primary: Web	Secondary: Mail	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 50,265.00	Indirect Budget: 0.00	Total Budget: 50,265.00
Principal Investigator/Clients	Brady West (SRC)		
Funding Agency	Internal UM sequestering funds		
IRB	HUM#: HUM00167171	Period of Approval:	
Project Team	Project Lead: Rebecca Gatward		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Grant D Benson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The American Family Health Study is a methodological project which aims to evaluate the feasibility of collecting national family, fertility and reproductive health data on a nationally-representative sample using a self-administered mode that is comparable to data collected with an in-person (interviewer-administered) study. The research design for the AFHS has seven clear steps. The additional work covered by this funding is to conduct step 7 (below):</p> <p>Step 1: finalize the design of the national web-based survey, using as much National Survey of Family Growth (NSFG) content as possible.</p> <p>Step 2: field the national web-based sequential mixed-mode survey over a two-year period, with the goal of collecting 4,000 completed surveys from a nationally representative sample.</p> <p>Step 3: conduct statistical analyses providing full-sample comparisons of estimates between our survey and the corresponding public-use data files for the NSFG from a similar time period.</p> <p>Step 4: conduct statistical analyses comparing estimates within key socio-demographic subgroups of the population – gender, race, and age groups.</p> <p>Step 5: examine changes in the gap in estimates (between the NSFG and our national web survey) across phases of the sequential mixed-mode design protocol.</p> <p>Step 6: compare costs, response indicators, and measures of effort across socio-demographic subgroups for different data collection modes and modules of the web-based survey.</p> <p>Step 7: further methodological research involving AFHS participants and non-respondents to inform the design of a larger-scale AFHS (research proposal).</p> <p>*****AFHS Panel Feasibility Survey*****</p> <p>The first component of this step involves AFHS respondents from the second sample replicate (n=~1370). These respondents will be invited to participate in a brief follow-up survey that aims to collect responses to a small number of additional questions (12) related to health, relationships, and finances, as well as gauge the interest of the respondent in becoming a panel member. These results will primarily be used to inform the design of a larger-scale AFHS study (research proposal); additional substantive analyses of the questions will also be conducted.</p> <p>All AFHS participants from the second sample replicate (n=~1370) will be invited to participate in the panel feasibility follow-up survey. The initial invitation to participants will be by letter, which will be mailed along with a \$2 token of appreciation. We will use addresses sampled for sample replicate 2 from the GENESYS system of Marketing Systems Group (MSG) - unless we received an updated address from the participant. We will also send the invitation by email for those participants who have provided a valid email address (84%).</p> <p>Non-response contact protocol:</p> <p>7 days after the initial invitation is mailed, participants will be contacted again by email (if available).</p> <p>14 days - we will send a further reminder by email or text message.</p> <p>21 days - email sent.</p> <p>28 days - paper copy of the survey along with a \$5 cash token to remaining non-responding participants.</p> <p>42 days - depending on the response rate we will telephone the participant to invite them to complete the follow-up survey.</p> <p>Participants will be mailed a \$10 check after completing the survey.</p> <p>This additional survey has been added to the existing AFHS MSMS project as an additional task. The existing task rules have been updated to include this data collection task but the non-response contact protocol will not be driven by task rules. We will manually change the status of the mail, text, email tasks as needed for relevant cases.</p> <p>Status:</p> <ul style="list-style-type: none">• Currently testing the full process from opening the survey link to data being updated in MSMS.• IRB amendment has been submitted and we have responded to requested changes following the first review.• Sample address file has been provided to DataForce who will print the paper surveys, mail the initial invites, scan any returned paper surveys, deliver data to SRO and mail the final reminder letter with paper survey. <p>*****AFHS Non-response Follow-up*****</p> <p>The second additional component is to gather information, using open-ended interviews, from AFHS non-respondents, to better understand why people did not participate in the study.</p> <p>We identified the sampled addresses in AFHS Replicate 2 that: 1) did not respond to the screening invitation, 2) were located in Census Block Groups with more than 10% African-American or Hispanics, and 3) were in the top quartile of predicted probabilities of having a Spanish-speaker present. Then, based on the locations of available in-person interviewing staff from our organization, we sub-selected around 40 addresses from this list.</p>		

Initially, face-to-face attempts will be made to recruit a household member at each of these addresses to participate in a short non-response follow-up (an open-ended interview). If these face-to-face attempts are not successful, we may then make up to seven contact attempts by telephone (for addresses where a telephone number is available through database searches (for example, MSG and Experian)).

SRO Project Period	06/2022 - 09/2023	
Data Col Period	06/2022 - 08/2022	
Security Plan	NA	
Milestones	<div><div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div><div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div></div>	
Other Project Team Members	Grant Benson Senior Project Advisor Wen Chang DMSS (inc.Dashboard) Raphael Nishimura DMSS (sample selection and Weights) Rebecca Gatward Survey Director James Rodgers Technical lead/MSMS lead Lloyd Hemingway Production Manager Dean Stevens Financial Analyst Andrew Hupp MSMS and Web survey expertise Deborah Wilson Help Desk Colette Keyser Blaise programmer (inc. Portal) Laura Yoder and Rose Zydel Data Managers	
Other Project Name	'A More Efficient Web-Based Approach to Collecting National Family, Fertility and Reproductive Health Data'.	
Sample Mgmt System	MSMS; Project specific system (For non-response follow-up we will just use Excel.)	
Data Col Tool	Blaise 5	
Hardware	Paper and Pencil	
DE Software	External vendor (Data Force)	
QC Recording Tool	N/A	
Incentive	Yes, R; Yes, Other (for non-response follow-up we will use a non-monetary incentive.)	
Administration	SRO Group	
Payment Type	Check, post (\$10); Other (Non-monetary incentive)	
Payment Method	Check through other system (RPay (MSMS))	
<hr/>		
Report Period	Apr, 2023 (AFHS-Additional work)	Implementing
Risk Level	On Track	
Monthly Updates	April updates SRO involvement is now minimal - an initial data file will be 'released' at the PAA conference in April. Work to prepare the the data to be made available for release through ICPSR will begin in May. The PI group plan to submit a new research proposal for the AFHS Panel in July 2023 and a state level project in October 2023. SRO is awaiting design decisions by the PI group to proceed further with the budget.	
Special Issues		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	57,841.93
	Est Cost at Completion (E\$AC):	62,794.04
	Total Budget:	50,265.00
	Variance (Total Budget minus- E\$AC):	-12,529.04
	Reason for Variance:	AFHS Feasibility Pilot Estimate – Expanded SRO # 22-0037R01 (Estimated costs at \$47,000 - \$53,000 direct costs. This estimate assumes that funding would be provided from UM internal sequestering funds and includes no indirect costs). The total cost at completion for the feasibility work is still within the budgeted estimate (\$47k-\$53k). Hours for Colette and I have been added to provide minimal support (up to 6hrs/month) until Sept'23 which increases the amount to be covered by sequestering funds. An updated summary of costs to be funded by these funds is attached. (5/16 file)
Projections as of May 15, 2023	Dollars Projected for Month:	986.72
	Actual Dollars Used:	562.71
	Variance (Projected minus Actual):	424.01
	Reason for Variance:	Colette and I have up 6 hrs projected a month between now and September 2023 for any adhoc requests and meeting attendance (me) - we will only use these hours as needed and hours used will vary by month. I charged 5 hours in April for meetings and preparing some

materials for the PAA conference booth.

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures

Project Name	(BFY) Baby's First Years												
Project Mode	Primary: Face to Face Total of Modes: 1												
Project Type	Sponsored Projects												
Budget	Direct Budget: 5,843,681.00	Indirect Budget: 1,994,180.73	Total Budget: 7,837,861.73										
Principal Investigator/Clients	Dr. Greg Duncan (University of California - Irvine)												
	Dr. Kimberly Noble (Teachers College Columbia University)												
	Dr. Katherine Magnuson (University of Wisconsin)												
Funding Agency	National Institute of Child Health and Human Development (NICHD)												
IRB	HUM#: HUM00137963	Period of Approval:											
Project Team	Project Lead: Piotr Dworak												
	Budget Analyst: Janelle P Cramer												
	Production Manager: Veronica Connors-Burge												
	Senior Project Advisor: Stephanie A Chardoul												
	Production Manager 1: Margaret Lavanger												
	Production Manager 2: Michelle Smith												
Proposal #	no data												
Description	<p>University of Michigan Survey Research Center (U-M SRC) is contracted to recruit and interview participants for Baby's First Years -- a longitudinal randomized control trial study.</p> <p>The study's full name, listed on sub-contract documents, is Household Income and Child Development in Early Years. The study will draw on a convenience sample of mothers and their newborns in four US metropolitan areas: New York City; Omaha/Lincoln; New Orleans; and Minneapolis. One or two hospitals, listed in this application, will be used as recruiting sites in each area. The study uses a randomized control trial design in which low-income mothers and newborns will be randomly assigned to a treatment group that receives an unconditional income enhancement -- cash payments of \$333 per month—an amount roughly comparable to a variety of income assistance policies in the U.S. and shown to be associated with meaningful improvements for poor children in prior studies—or to a control condition that receives \$20 per month. In both groups, the payments will be made for the first 40 months of the child's life. To understand the impacts of added income on children's development, researchers will assess treatment/control group differences at ages 1, 2 and 3 on measures of cognitive, language, memory, self-regulation and socio-emotional development. Recruitment is scheduled to start in April of 2018, and each follow-up interview will be conducted 12 months later -- close in time to the child's 1st, 2nd, and 3rd birthday. The feasibility of the approach has been established in a one-year pilot conducted in 2014 at the New York Presbyterian Hospital/Columbia University Medical Center.</p> <p>The Principal Investigators are Dr. Greg Duncan from University of California Irvine (UCI), Dr. Kimberly Noble from Teacher's College Columbia University (TCCU), and Katherine Magnuson from University of Wisconsin-Madison (UWM). UCI (Dr. Duncan) and TCCU (Dr. Noble) are the institutions and signatories funding the U-M SRC subcontract from various sources including the National Institute for Child Health and Human Development (NICHD) and private foundations listed in this application. The study research team also includes co-investigators Lisa Gennetian (New York University), and Hiro Yoshikawa (New York University).</p> <p>SRO will be responsible for four interactions with the selected mothers/infants:</p> <ul style="list-style-type: none"> • Baseline will occur immediately (within 24-48 hours) after birth, in the hospital; • Wave 1 will be a telephone interview with the mother when the child is 12 months old; • Wave 2 will be an in-person interview in the family's home that includes survey, developmental assessment, biomarker collection, and video recorded behavioral interaction when the child is 24 months old; • Wave 3 will be an in-person survey done while the mother and child are visiting a lab for other clinical tests when the child is 36 months old. <p>Each data collection phase/wave will be a full 12 months, with Baseline starting in April 2018:</p> <p>Recruitment/Baseline: 04/01/2018 - 03/31/2019 Wave 1: 04/01/2019 - 03/31/2020 Wave 2: 04/01/2020 - 03/31/2021 Wave 3: 04/01/2021 - 03/31/2022</p>												
SRO Project Period	10/2017 - 12/2020												
Data Col Period	04/2018 - 12/2020												
Security Plan	NA												
Milestones	<table border="0"> <tr> <td>Pre Production Start: 10/01/2017</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start: 01/01/2018</td></tr> <tr> <td>Staffing Complete: 02/07/2018</td><td>GIT Start: 03/19/2018</td></tr> <tr> <td>SS Train Start: 03/20/2018</td><td>SS Train End: 03/22/2018</td></tr> <tr> <td>DC Start: 05/07/2018</td><td>DC End: 06/30/2022</td></tr> </table>			Pre Production Start: 10/01/2017	Pretest Start:	Pretest End:	Recruitment Start: 01/01/2018	Staffing Complete: 02/07/2018	GIT Start: 03/19/2018	SS Train Start: 03/20/2018	SS Train End: 03/22/2018	DC Start: 05/07/2018	DC End: 06/30/2022
Pre Production Start: 10/01/2017	Pretest Start:												
Pretest End:	Recruitment Start: 01/01/2018												
Staffing Complete: 02/07/2018	GIT Start: 03/19/2018												
SS Train Start: 03/20/2018	SS Train End: 03/22/2018												
DC Start: 05/07/2018	DC End: 06/30/2022												

Other Project Team Members	Stephanie Chardoul (SPA) Piotr Dworak (Lead) Tony Romanowski (PM) Daric Thorne (PM/SSA) Barb Homburg (PM) Peggy Lavanger (PM) Jim McClure (DCS) Jeff Smith (tech lead) Jim Rodgers (MSMS consultant) Andrew Hupp (MSMS consultant) Pam Swanson (MSMS programmer) Kyle Kwaiser (Data Manager) Dave Dybicki (Blaise) Colette Keyser (Blaise) Tricia Blanchard (MSMS) Kyle Goodman (Help Desk)	
Other Project Name	HHICD Household Income and Childhood Development	
Sample Mgmt System	MSMS	
Data Col Tool	Blaise 5	
Hardware	Laptop; [UM cell] Phone	
DE Software	N/A	
QC Recording Tool	Other (to be specified)	
Incentive	Yes, R	
Administration	SRO Group	
Payment Type	Cash, prepaid (50)	
Payment Method	Check through other system (MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (MSMS)	
<hr/>		
Report Period	Apr, 2023 (BFY)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Project updates:</p> <p>Note: BFY Age 3 main data collection has ended on June 30, 2022 with 922 completes exceeding the goal of 907 (and the proposal goal of n=860).</p> <p>Between July 2022 and April 2023 interviewers conducted the Age3 + 3-month, +6-month, and +10-month check-in calls or visits to confirm and update contact information and invite respondent to a lab visit conducted by the PI research teams at Age 4. At Age 3 + 10-month we handing the cases off to the local lab research teams.</p> <p>On 5/22/2023, we delivered the last batch of cases to the lab.</p> <p>PIs confirmed they will require U-M Interviewers assistance and are discussing extension of SRO involvement.</p> <p>Short term: Interviewers will continue locating hard-to-reach cases through the end of Age 4 on July 31, 2023.</p> <p>Long Term: PIs are considering using Valhalla funding (including the current underrun) to retain SRO services throughout Age 6 (September 2025) and potentially through Age 8 (Sep 2027). We expect the final decision in May 2023.</p> <p>Part of that effort will be a one-time contact information update with all respondents.</p> <p>We also continue to follow the plan outlined during the September BFY advisory board meeting wherein our SRC iwers help Lab teams achieve their response rate targets. We are conducting line-by-line reviews and guide RAs/Site Coordinators in strategies for those cases, providing in-service training similar to the training offered to our lwers (e.g., addressing R concerns, etc.), and directly reaching out to and locate some hard-to-reach Rs. We have worked on ~ 100 cases and part of that effort includes upcoming trips to NOLA in May and June.</p> <p>Age 4 Staffing: 12 iwers in total NE: 1 OS + 1 NH (Trained 9/15) MN: 2 NY: 4 OS (1 consolidated in October 2022) NOLA: 1 (1 June resignation) TLs: 1 (- 1 has gone to HRS)</p> <p>Technical system: All tech systems are working as needed.</p> <p>Finances: A notification was sent to the PIs on 1/20 estimating the total expected underrun may reach ~ \$300K. PIs are expected to apply this underrun to extending SRO involvement through Age 6 or 8.</p>	
Special Issues		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	7,365,542.85

Est Cost at Completion (E\$AC):		7,507,258.41		
Total Budget:		7,837,861.73		
Variance (Total Budget minus- E\$AC):		330,603.32		
Reason for Variance:		We continue to extend underrun even after adjusting the budget to forecast all potential sources of underrun - mainly due to decreasing demand for SRO assistance with the current active cases and a delay in engaging SRO in the future contact update activities. However, Pls are on the cusp of formally extending SROs engagement through Age 8 of the focal child and part of that engagement will be funded from the current underrun.		
Projections as of May 15, 2023	Dollars Projected for Month:	52,100.47		
	Actual Dollars Used:	48,083.51		
	Variance (Projected minus Actual):	4,016.96		
	Reason for Variance:	Despite adjustments, we continue to see underrun due to lower iwer hours and savings in the project management time.		
Measures		Units at Complete	RR	HPI
	Current Goal:	907	91%	7.0
	Goal at Completion:	907	91%	7.0
	Current Actual:	921	92%	5.7
	Estimate at Complete:	926	92%	6.0
	Variance:			
Other Measures				

Project Name	(BHM Library Project) Developing a Model of Black History Month Programming in Public Libraries		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 126,712.00	Indirect Budget: 70,959.00	Total Budget: 197,671.00
Principal Investigator/Clients	Deborah Robinson (ISR)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will support the project in the first year by working with you to design the sample. SRO will support the implementation of up to two pilot surveys and the larger national survey of libraries. We will provide consultation on scale development throughout the pilot phase and provide statistical support to finalize the scales and provide a working dataset (with weights to account for the stratified sample design). In total, the SRO period of performance will be approximately 24 months in duration, starting in February of 2023, with data collections for the pilots and national survey taking place over approximately 12 months, starting in late 2023.		
SRO Project Period	02/2023 - 02/2025		
Data Col Period	10/2023 - 09/2024		
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members			
Other Project Name	Developing a Model of Black History Month Programming in Public Libraries		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (BHM Library Project)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Still slow-going on decision-making for sample exclusions. While there is some planning on the PI's part for establishing contact information for libraries we eventually select, there is no staff in place to secure this contact information.		
Special Issues	None		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	9,407.04	
	Est Cost at Completion (E\$AC):	197,585.48	
	Total Budget:	197,671.00	
	Variance (Total Budget minus- E\$AC):	85.52	
	Reason for Variance:	na	
Projections as of May 15, 2023	Dollars Projected for Month:	21,907.76	

Actual Dollars Used:		2,359.94		
Variance (Projected minus Actual):		19,547.82		
Reason for Variance:		We have not utilized our hours as the project planning is very slow.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures	None			

Project Name	(CARE Military) Concussion Assessment, Research and Education (CARE) Consortium 2022 - Military		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,131,747.00	Indirect Budget: 294,254.00	Total Budget: 1,426,001.00
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology) Dr. Micheal McCrea /Dr. Pasquina (Medical College of Wisconsin/Uniformed Services Un) Dr. Thomas McAllister (Indiana University School of Medicine)		
Funding Agency	NCAA and DoD		
IRB	HUM#: 00202691		Period of Approval: 7/23/2021 - open
Project Team	Project Lead: Donnalee Ann Grey-Farquharson Budget Analyst: Carl S Remmert Production Manager: Stacy Quisenberry Senior Project Advisor: Barbara Lohr Ward Production Manager 1: Hongyu Johnson Production Manager 2: Keith Liebetreu		
Proposal #	no data		
Description	<p>The project follows academy cadets post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure.</p> <p>This project has an overall SRO involvement period of 13 months, beginning March 2022, with data collection taking place over approximately 12 months starting mid-March 2022. SRO provides consultation, respondent locating activities and data collection for respondents in the uniformed services sample.</p> <p>The goal is to secure participation from approximately 3,200 unique past-CARE study participants. Participants will complete a study assessment once over the 13-month project period. SRO decentralized field interviewers locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct approximately 1,425 telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>The estimate total cost for the overall scope of work is \$1,426,001.00. This includes \$1,131,747.00 direct and \$294,254.00 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders).</p>		
SRO Project Period	02/2022 - 03/2023		
Data Col Period	03/2022 - 02/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert		
Other Project Name	CARE-CSI Military		
Sample Mgmt System	Other (non-SRO)		
Data Col Tool	Other (non-SRO)		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	Other (Kinesiology)		
Payment Type	Check, post (\$150)		
Payment Method	Other (Kinesiology)		

Report Period	Apr, 2023 (CARE Military)		Implementing
Risk Level	On Track		
Monthly Updates	1. Project Management: SRO is wrapping up to complete target groups to reach the goals of production.		

SRO is expecting to receive additional fund \$260K total to continue military data collection beyond May 2023. The Sample size will not be increased per the initial agreement with the additional funding. Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection.

We also continue to discuss the locating reports with the Locating Team for its accuracy.

2. Care SMS system update:

SRO continues to discuss how we want to display TOA amount for different waves and modify some key features in the SMS for the DCP3.

SRO continues to work with QG to prepare system for DCP3 training.

SRO staff continue to test system with TLs' help.

3. Questionnaire Development:

SRO continue to test all Military survey questionnaire to prepare for training and DCP3 starts.

4. Production:

SRO has reached the goal of 3000 completed interviews before the schedule.

Production Stats as of 04/30/2023: we greatly exceeded the goal of 3000 completes.

12785 Released: Total Comp lws-3254-25.6% (Web-3207-25.2%, CATI-47 -0.4%)

We started to brain storm to find ways to motivate the field staff in order to get a good start for DCP3.

SRO and the field staff had a final conference call to celebrate successful DCP2.

5. Hiring and Training:

We have finalized the DCP3 training plan, secured training dates, started to prepare all training related activities.

6. DMSS:

SRO starts to look into what the final reports should look like so we could request from Datalys. The last day to get data delivery from Datalys was on April 27, 2023.

7. Locating:

The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents.

Military find rate: 47.11%

Special Issues

Cost as of Apr 30, 2023	Total Cost to Date (direct + indirect):	1,359,874.13
	Est Cost at Completion (E\$AC):	1,425,595.78
	Total Budget:	1,426,001.00
	Variance (Total Budget minus- E\$AC):	405.22
	Reason for Variance:	Military work is closed by the end of April. The underrun for Military is still showing. This is because the transfer of interviewer hours haven't been processed yet. We will update when all the costs on Military have been completed.

Projections as of Apr 30, 2023	Dollars Projected for Month:	145,699.47
	Actual Dollars Used:	147,443.47
	Variance (Projected minus Actual):	-1,744.00
	Reason for Variance:	

Measures	Units at Complete	RR	HPI
Current Goal:			
Goal at Completion:			
Current Actual:			
Estimate at Complete:			
Variance:			

Other Measures

Project Name	(CARE SALTOS MTEC) Concussion Assessment, Research and Education (CARE) Consortium 2022												
Project Mode	Primary: Telephone	Secondary: Web	Total of Modes: 2										
Project Type	Sponsored Projects												
Budget	Direct Budget: 3,718,978.00	Indirect Budget: 966,936.00	Total Budget: 4,685,914.00										
Principal Investigator/Clients	Dr. Steven Broglio (U of M Kinesiology)												
	Dr. Michael McCrea (Medical College of Wisconsin)												
	Dr. Thomas McAllister (Indiana University School of Medicine)												
Funding Agency													
IRB	HUM#: 00202691	Period of Approval: 7/23/2021 - open											
Project Team	Project Lead: Donnalee Ann Grey-Farquharson												
	Budget Analyst: Carl S Remmert												
	Production Manager: Stacy Quisenberry												
	Senior Project Advisor: Barbara Lohr Ward												
	Production Manager 1: Hongyu Johnson												
	Production Manager 2: Keith Liebetreu												
Proposal #	no data												
Description	<p>SRO will provide consultation, respondent locating activities and data collection for respondents in the longitudinal Concussion Assessment, Research and Education (CARE) study, with the goal of securing participation from 7,500 unique past-CARE study participants. Participants will complete the same set of study assessments at two time points over the five-year project period. The project follows collegiate athletes post-graduation to assess health and well-being outcomes and a number of physical and psychological measures to enable researchers to study the intermediate and cumulative effects of concussion and repetitive head impact exposure. Specifically, SRO decentralized field interviewers will locate and contact respondents by phone to prompt them to access the online data collection questionnaire. SRO will conduct telephone interviews with participants who fail to respond to invitations to complete follow-up interviews on the web.</p> <p>This budget assumes an overall SRO involvement period of approximately 44 months over two waves. Wave 1 SRO involvement will begin in December 2021 with data collection taking place over approximately 12 months, beginning approximately May 2022. Wave 2 SRO involvement will begin in November 2023 with data collection taking place over approximately 12 months starting in May 2024.</p> <p>Currently, the total cost for the overall scope of work (based on the currently committed funding from all sources) is estimated at \$4,685,914. This includes \$3,718,978 direct and \$966,936 indirect costs, using the NCAA's published indirect cost rate of 26% (which is being used for all funders). As additional sources of funding are identified and those resources committed to SRO survey data collection activities, or inversely if a funder withdraws or reduces their level of funding to the project, the scope of work (e.g., the number of interviews to be collected) will increase or decrease respectively.</p> <p>The estimate of funding contributed by the Department of Defense through the MTEC RFP is \$2,277,689. This includes \$1,807,689 direct costs and \$470,000 indirect costs budgeted at the 26% indirect cost rate. The proposed period of support is September 1, 2021 through August 31, 2025.</p>												
SRO Project Period	10/2021 - 08/2026												
Data Col Period	03/2022 - 02/2026												
Security Plan	NA												
Milestones	<table> <tr> <td>Pre Production Start:</td><td>Pretest Start:</td></tr> <tr> <td>Pretest End:</td><td>Recruitment Start:</td></tr> <tr> <td>Staffing Complete:</td><td>GIT Start:</td></tr> <tr> <td>SS Train Start:</td><td>SS Train End:</td></tr> <tr> <td>DC Start:</td><td>DC End:</td></tr> </table>			Pre Production Start:	Pretest Start:	Pretest End:	Recruitment Start:	Staffing Complete:	GIT Start:	SS Train Start:	SS Train End:	DC Start:	DC End:
Pre Production Start:	Pretest Start:												
Pretest End:	Recruitment Start:												
Staffing Complete:	GIT Start:												
SS Train Start:	SS Train End:												
DC Start:	DC End:												
Other Project Team Members	Donnalee Grey-Farquharson, Stacy Quisenberry, Hongyu Johnson, Keith Liebetreu, James Koopman, Minako Edgar, David Ackuaku, Carl Remmert												
Other Project Name	CARE CSI, CARE SALTOS												
Sample Mgmt System	Other (non-SRO)												
Data Col Tool	Other (non-SRO)												
Hardware	Laptop; [UM cell] Phone												
DE Software	N/A												
QC Recording Tool	N/A												
Incentive	Yes, R												
Administration	UM Group (Kinesiology)												
Payment Type	Check, post (\$150.00)												

Payment Method	Check through other system (UM)			
<hr/>				
Report Period	Apr, 2023 (CARE SALTOS MTEC)		Implementing	
Risk Level	On Track			
Monthly Updates	<p>MTEC</p> <p>1. Project Management: SRO is wrapping up to complete target groups to reach the goals of production. Donnalee continues the dialogue with UM PI to discuss endgame strategies and to plan for the next round of data collection. Donnalee is still waiting for QG to deliver the data on Social Media platforms performance in order to evaluate the efficiency of using them. SRO continues to discuss the locating reports with the Locating Team for its accuracy. SRO is working with the CARE team on managing sample transferring situation in order to maintain sample accuracy.</p> <p>2. CARE SMS system update: SRO continues to discuss how we want to display TOA amount for different waves and modify some key features in the SMS for the DCP3. SRO continues to work with QG to prepare system for DCP3 training. SRO staff continue to test system with TLs' help.</p> <p>3. Questionnaire Development: SRO continue to test all survey questionnaire to prepare for training and DCP3 starts.</p> <p>4. Production: DCP2 Production ended on 04/26/2023 Production Stats as of 04/30/2023: We exceeded the goal of 3200 completes. 13041 Released: Total Comp lws-3256 – 25.1% (Web-3209 -24.7%, CATI-47-04%)</p> <p>We started to brain storm to find ways to motivate the field staff in order to get a good start for DCP3. SRO and the field staff had a final conference call to celebrate successful DCP2.</p> <p>5. Hiring and Training: We have finalized the DCP3 training plan, secured training dates, started to prepare all training related activities</p> <p>6. DMSS: SRO starts to look into what the final reports should look like so we could request from Datalys. The last day to get data delivery from Datalys was on April 27, 2023.</p> <p>7. Locating: The Locating team continues to use the full spectrum of messages approved by IRB to communicate with the respondents. Civilian find rate: 44.72%</p>			
Special Issues				
Cost as of Apr 30, 2023	Total Cost to Date (direct + indirect):		1,033,017.70	
	Est Cost at Completion (E\$AC):		4,681,743.04	
	Total Budget:		4,685,914.00	
	Variance (Total Budget minus- E\$AC):		4,170.96	
	Reason for Variance:			
Projections as of Apr 30, 2023	Dollars Projected for Month:		-44,191.52	
	Actual Dollars Used:		17,960.14	
	Variance (Projected minus Actual):		-26,231.38	
	Reason for Variance:		MTEC is showing a big variance in April compared to what was projected. A large reason for this is because we expected the transfer to go through in April so that was factored into projections.	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(CRUSE - AHDFS) Survey on Crypto-Asset Adoption and Use / American Household Digital Finance Survey		
Project Mode	Primary: Web	Secondary: Focus Group	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 469,808.00	Indirect Budget: 136,244.00	Total Budget: 606,052.00
Principal Investigator/Clients	Vikramaditya Khanna (UM Law School)		
Funding Agency			
IRB	HUM#: HUM00214234	Period of Approval: 1/1/2022-12/31/2022	
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Lisa S Holland		
	Production Manager 1:		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	<p>Revised project costs are \$635,344 (\$625,726 + \$9,618). Original description below. Focus groups completed as designed. Project has been revised in that the PI has requested only an initial replicate be used for the survey pending full funding availability. Also, full indirect rate is not applied as we originally indicated. ORSP and Financial Services determined this was not research but was in fact other sponsored activity. IDC revised to 29%.</p> <p>ORIGINAL DESCRIPTION:</p> <p>SRO will conduct two exploratory focus groups and web-based data collection to study awareness, use and adoption of crypto-assets in the general population and more specifically among those more informed about crypto-assets. SRO will screen an address-based representative sample of approximately 40,980 U.S. households for adults who hold or have held crypto-assets. All who report crypto-asset holdings will be invited to participate in the web survey, along with a random sub-sample of those who have not held crypto-assets. SRO interviewers will conduct reminder calling to non-respondents to encourage them to participate in the survey.</p> <p>This budget assumes an overall SRO involvement period of 12 months commencing in May 2022 with focus groups taking place in May or early June 2022 and the web data collection taking place during a 5-month period beginning September 2022. The total cost for this work is estimated at \$1,724,766 (\$1,105,619 direct, \$619,147 indirect), budgeted at the University-approved indirect recovery rate of 56 percent.</p> <p>\$635,344 (\$625,726 + \$9,618).</p>		
SRO Project Period	05/2022 - 04/2023		
Data Col Period	10/2022 - 02/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 08/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 10/14/2022</div><div>SS Train Start: 11/29/2022</div><div>DC Start: 11/02/2022</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 09/14/2022</div><div>GIT Start: 11/29/2022</div><div>SS Train End: 11/29/2022</div><div>DC End: 03/01/2023</div></div>		
Other Project Team Members	Karin Schneider conducted focus group. Survey phase led by Piotr Dworak. Team include Ian Ogden and Xiomara Guerra.		
Other Project Name	American Household Digital Finance Survey		
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 4.8		
Hardware	Other		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$2); Other (survey completes paid by check)		
Payment Method	Check through other system (focus groups recd e-gift card (Tango))		
Report Period	Apr, 2023 (CRUSE - AHDFS)		Implementing
Risk Level	On Track		
Monthly Updates	Crypto is proceeding with project close by coding out, delivering and weighting the data. Expected data delivery in early May was delayed due to non-response from the PI on how to treat the partial cases.		

In terms of final production yields -----

Crypto had exceeded the goal after adding sample. We ended the project with 1,774 interviews vs. the goal of 1539. Stats Unit and PM conducted a response bias analysis to make sure the latest release produced unbiased results despite being given less time to mature (4 weeks in production vs. 18 weeks, 2 less mailed reminders and less non-response calling; but a higher incentive). The strategy of adding the sample as was approved by the PIs and they are also agreeing with the plan to wrap up data collection as soon as responses stop coming in (likely week of 4/24), delivering raw data soon after, and delivering weighted data by May 12.

Despite shorter time in field (but a higher incentive), Release 5 exceeded expectations achieving 11% completion (n = 511) vs. 8% expected which is comparable with the completion on earlier releases (11.4% - 12.5%).

Crypto Releases and invitation dates:

1: 507 11/3/2022, moved to SSL non-response follow up on 11/29
 2: 2,049 11/10/2022, moved to SSL NRFU on 12/07
 3 & 4: 7,684 11/15/2022, moved to SSL NRFU on 12/13
 5 3/27: 4671, Invitation mailing 3/27, reminder 1 mailing 4/3
 Total: 14,911

On April 24, SSL had concluded work on Crypto with exception of ad hoc follow up calls in response to emails, call-ins, etc. We plan the project celebration with iwers on Friday 4/28.

Throughout the study, SSL has contributed excellent effort with high dials per hour, texting, calling priority lines, however, the number of surveys completed after the calls is very low (only ~ 20 per month).

Sample balancing:

The sample continues to be well-balanced on key income / geo distribution and the Crypto use levels track known indices. We also analyzed differences between early and later responders with an eye on any differences among Release 5 respondents treated with the "shorter" field period. We were satisfied to observe no difference on a set of immutable attitudes and behaviors.

Finance:

Crypto continues to build underrun attributable to lower billings by staff at all levels and inability to fill the projected iwer hours. The underrun will sufficiently cover the sample augment and additional mailings. In discussions with the PI the underrun could be use to assist with the analysis.

Special Issues		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	522,990.10
	Est Cost at Completion (E\$AC):	537,137.08
	Total Budget:	606,052.00
	Variance (Total Budget minus- E\$AC):	68,914.92
	Reason for Variance:	Underrun is mostly due to savings in management and tech costs as well as not reaching the projected iwer hours. Lower actual hours allowed us to extend the lab involvement through early April and fund additional sample required to meet the goal.
Projections as of May 15, 2023	Dollars Projected for Month:	60,549.95
	Actual Dollars Used:	80,518.83
	Variance (Projected minus Actual):	-19,968.88
	Reason for Variance:	Additional vendor PO was projected in March but paid in April.

Measures		Units at Complete	RR	HPI
	Current Goal:	1529	14.9%	
	Goal at Completion:	1529	14.9%	
	Current Actual:	1774	11.9%	
	Estimate at Complete:	1774	11.9%	
	Variance:			

Other Measures

Project Name	(DCUS) Daily Cannabis Use Study		
Project Mode	Primary: Web	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 49,742.00	Indirect Budget: 0.00	Total Budget: 49,742.00
Principal	Brady West (ISR)		
Investigator/Clients	Sean McCabe (ISR)		
Funding Agency	National Institutes of Health (NIH)		
IRB	HUM#: HUM00229404	Period of Approval: Pending	
Project Team	Project Lead: Gary Hein		
	Budget Analyst: David Kellermeyer		
	Production Manager:		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1: Rebecca Loomis		
	Production Manager 2:		
Proposal #	no data		
Description	This study aims to decipher the daily motives for cannabis use among light and heavy cannabis users, and their associations for longer-term use behaviors. We will recruit 50 cannabis users via the MICHHR database and assign them to into groups of 25 'light' users and 25 'heavy' users based on a screener survey. Selected candidates will be asked to complete a baseline survey of about 10 or 15 minutes, 28 daily surveys of about 5 minutes, and a follow up survey of 15-20 minutes. Respondents will be paid up to \$96 for participating (\$2 per daily survey completion for up to 28 days, \$20 for the baseline survey completion and \$20 for the follow up survey completion).		
SRO Project Period	01/2023 - 06/2023		
Data Col Period	04/2023 - 06/2023		
Security Plan	Yes		
Milestones	<div><div>Pre Production Start: 01/17/2023</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	Gary Hein - Project Lead Rebecca Gatward - SPA Rebecca Loomis - Project Manager Davis Kellermeyer - Budget Analyst Wen Chang - Stats lead Ji Qi - Statistician Laura Yoder - Data Manager		
Other Project Name	Transitions in Daily Motives for Cannabis Use and Their Associations for Longer-Term Use Behaviors		
Sample Mgmt System	Other (Manual)		
Data Col Tool	Other (Qualtrics)		
Hardware	[UM cell] Phone		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Other (Tango Code)		
Payment Method	Other (E-mail via Tango)		

Report Period	Apr, 2023 (DCUS)		Planning
Risk Level	On Track		
Monthly Updates	All hours in March spent in pre-production working on: 1- Writing and submitting requested IRB revisions. 2- Meeting with PIs and SRO team to discuss the project design based on IRB requested revisions 3- Project team meetings. Discussed reporting and data management plan. 4- Programming. Programmed screener survey.		
Special Issues			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):		13,621.25
	Est Cost at Completion (E\$AC):		30,840.85

Total Budget:		49,742.00		
Variance (Total Budget minus- E\$AC):		18,901.15		
Reason for Variance:		Differences in between proposed and projected scope: 1- Project management was budgeted at the survey director level, but I'll be leading the project and I was billed a survey specialist Intermediate. 2- I'm programming all of these instruments myself, so programming hours based on specification are lower. 3- Work scope for data management is limited, so projections have been reduced in line with this scope.		
Projections as of May 15, 2023	Dollars Projected for Month:	5,881.54		
	Actual Dollars Used:	7,605.50		
	Variance (Projected minus Actual):	-1,723.96		
	Reason for Variance:	Hours from Jan and Feb not previously included due to a shortcode change were added in April, giving the appearance of an overrun for the month.		
Measures		Units at Complete	RR	HPI
	Current Goal:	50	75%	N/A
	Goal at Completion:	50	75%	N/A
	Current Actual:	N/A	N/A	N/A
	Estimate at Complete:	50	75%	N/A
	Variance:	0	0%	N/A
Other Measures				

Project Name	(ECHO (Year 7)) Environmental Influences on Child Health Outcomes		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 336,908.00	Indirect Budget: 188,668.00	Total Budget: 525,576.00
Principal Investigator/Clients	Nigel Paneth (Michigan State University)		
	Michael Elliott (University of Michigan)		
	Jean Kerver (Michigan State University)		
Funding Agency	NIH		
IRB	HUM#: HUM00139050	Period of Approval: 10/2/2021-8/13/2022	
Project Team	Project Lead: Shonda R Kruger-Ndiaye		
	Budget Analyst: William Lokers		
	Production Manager:		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1: Ian Ogden		
	Production Manager 2: Sharon K Parker		
Proposal #	no data		
Description	<p>The goal of ECHO is to understand pressing childhood health concerns such as autism spectrum disorders, low birth weight and childhood obesity. The project will collect survey data and a series of bio-specimens in order to assess the effects of persistent organic pollutants and heavy metals, maternal nutritional or weight status in pregnancy, and pregnancy infection and inflammation on the health of children.</p> <p>The study includes two sample cohorts: a cohort from previous, ongoing data collection efforts as well as new sample. This existing sample cohort includes mothers and children recruited in 2011 or later for the Archive for Research in Child Health (ARCH) study in the Lansing area. The newly recruited sample cohort, MARCH (Michigan Archive for Research in Child Health), will consist of 1,100 pregnant women: 1) a statewide probability sample of 1,000 women from 20 prenatal clinics affiliated with 10 hospitals located in Ann Arbor, Dearborn, Detroit, Grand Rapids, Novi, Saginaw, Port Huron and Traverse City, and 2) 100 women from one clinic in Flint.</p> <p>SRO's work scope is divided into two phases. During Phase 1, SRO provided assistance with prenatal questionnaire development and designed technical systems for MARCH cohort recruitment conducted by Michigan State University-employed (and other hospital-employed) interviewers and affiliated project staff. During Phase 2, SRO developed systems and is conducting data collection for MARCH sample 3-month. The MARCH age 4-5 follow up interviews and home visits are also in SRO's work scope. All other follow up protocols with the MARCH sample will be administered via REDCap by the MSU team (e.g. at 9-month, age 2 and age 3).</p> <p>For the MARCH sample, expectant mothers are recruited during their initial prenatal visit to a healthcare provider. During a follow up phone call, respondents are asked to complete an interview about nutrition, levels of physical activity, use of healthcare services, physical and mental health, prescription medications and other substance use. In addition, women are asked to give blood samples in the first and second trimesters and urine samples in all three trimesters.</p> <p>The sample recruitment and administration of prenatal interviews is conducted by MSU-employed (and other hospital-employed) interviewers using SRO's technical systems and laptops. SRO programmed all questionnaires administered during recruitment, the sample management system(s), and the system to keep track of the collection and storage of blood and urine samples. When babies are born, the research team obtains hospital birth records for the mother and child and a placenta sample. The first MARCH babies were born in early 2018.</p> <p>SRO's data collection activities start after the MARCH babies are born. The first interview with the mother is done when the baby is 3-6 months old. Mothers are interviewed again by MSU when the children are 9-12 months old, and yearly after that until the child is 4 years old. When the children are 3 months old, mothers are asked to provide a child fecal sample and toenail clippings, and at age 4 they will provide shed teeth. Children from the MARCH cohort will be assessed using standardized developmental assessments at 4-5 years old. The assessments will be done during in-home visits.</p>		
SRO Project Period	01/2017 - 08/2023		
Data Col Period	05/2018 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		

Other Project Team Members	Ian Ogden: Project Manager Steven Sonoras: Project Manager Nahid Sultana: Project Manager William Lokers: Financial Analyst Jeff Smith: Technical Lead Mark Simonson: Data Manager (Phase 1) Brad Goodwin: Data Manager (Phase 2) Jennie Williams: Data Manager (Phase 3) Jeff Smith: SurveyTrak Systems Programmer Ashwin Dey: Systems Programmer Hueichun Peng: CAI Programmer-Illume Peter Sparks: CAI Programmer-Blaise Shaowei Sun: Biospecimen Logging Application Programmer Deb Wilson: Help Desk
-----------------------------------	--

Other Project Name

Sample Mgmt System	SurveyTrak; Illume; Project specific system (REDCap)
Data Col Tool	Blaise 4.8; Illume
Hardware	Laptop; Tablet; [UM cell] Phone; Paper and Pencil
DE Software	Illume; Other (Biospecimen Logging Application)
QC Recording Tool	Camtasia
Incentive	Yes, R
Administration	SRO Group
Payment Type	Check, post (\$20 (3-Month IW), \$20 (Biospecimen)); Cash, prepaid
Payment Method	Check through STrak RPay System

Report Period	Apr, 2023 (ECHO (Year 7))	Implementing
Risk Level	On Track	

Monthly Updates	<p>[Phase 1: Recruitment and Prenatal Surveys]</p> <p>The MARCH recruitment target was 1,110 mothers / live births. Recruitment is done and the final count is 1,113.</p> <p>-----</p> <p>Prod Stats as of 4/23/23</p> <p>[Phase 2: 3-Month Data Collection]</p> <p>3-month sample released: 1058</p> <p>3-month interviews completed: 772</p> <p>Average attempts / lw: 7.6</p> <p>lw length: 36 min</p> <p>Response Rate: 74%</p> <p>3-month biospecimen collected: 439</p> <p>-----</p> <p>[Phase 3: Age 4 REDCap Survey]</p> <p>Age-4 sample released: 373</p> <p>REDCap surveys completed: 259</p> <p>Response Rate: 70%</p> <p>-----</p> <p>[Phase 3: Age 4 In-Person Visit Protocols]</p> <p>Age-4 IPV sample released: 207</p> <p>In-person visits completed: 65</p>
------------------------	--

Special Issues	SRO has made good progress in working with MSU to define close out procedures for each component. MSU doesn't yet know if it will receive funding to continue any aspect of data collection beyond August. Regardless, any continuation would be without SRO.
-----------------------	---

Cost as of May 17, 2023	Total Cost to Date (direct + indirect):	336,309.36
	Est Cost at Completion (E\$AC):	520,175.00
	Total Budget:	525,576.00
	Variance (Total Budget minus- E\$AC):	5,401.00
	Reason for Variance:	This is the first cost report to reflect the budget lowered by \$47,125 (dir) to reflect the transfer to the U-M lab doing the bloodspot analysis. Actuals came in slightly high in April, however, this was eclipsed by the removal of \$5k projected for the Illume Remote Data Collector license,

which we understand we will no longer be charged.

Projections as of May 17, 2023	Dollars Projected for Month:	41,970.09
--------------------------------	------------------------------	-----------

Actual Dollars Used:	42,445.83
----------------------	-----------

Variance (Projected minus Actual):	-475.74
------------------------------------	---------

Reason for Variance:	Trivial monthly variance
----------------------	--------------------------

Measures		Units at Complete	RR	HPI
	Current Goal:	See Monthly Updates		
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(EDC-Endline) Every Dollar Counts Endline		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,382,700.00	Indirect Budget: 714,811.00	Total Budget: 3,097,511.00
Principal	Stephanie Chardoul (SRO)		
Investigator/Clients	Sarah Miller (Ross Business School)		
Funding Agency			
IRB	HUM#: HUM00164105	Period of Approval: 12/23/2022-12/23/23	
Project Team	Project Lead: Karin Schneider		
	Budget Analyst: Christine Evanchek		
	Production Manager: Barbara Aghababian-Homburg		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Karin Schneider		
	Production Manager 2: Donnalee Ann Grey-Farquharson		
Proposal #	no data		
Description	<p>The overall project is funded by a consortium (currently consisting of both OpenResearch Lab (Open) and NIH. OpenResearch Lab (Open) (formerly Y Combinator Research) and the principal investigators are conducting an evaluation of Every Dollar Counts, a cash assistance gift program being administered by two non-profit organizations: CitySquare, based in Dallas, Texas, and Heartland Alliance, located in Chicago, Illinois (the Community Partners).</p> <p>The purpose of this study is to explore how the program affects multiple dimensions of recipients' lives. Key outcomes of interest include health, subjective and material well-being, time use, financial health, labor market participation, social and civic engagement, and effects on children. SRO concluded the Baseline interviews in 2020, and the Midline interviews in July 2022. The EDC Endline project will reach out to all Baseline respondents for completion of a telephone interview, followed by an in-person interview (with cognitive tasks, anthropometric measurements and collection of dried blood spots) for those respondents still in the greater Chicago area or greater Dallas/Ft. Worth area. Data collection will take place between March 2023 and late September 2023. SRO assumes approximately 91% of the 2,990 Baseline respondents are located and willing to be interviewed again (2,720 90-minute telephone interviews). SRO assumes that in-person interviews will be completed with 2,003 respondents still living in the greater Chicago or Dallas/Ft. Worth and Waco area. About 400 respondents are known to currently reside outside of these areas; these respondents will not be asked to complete an in-person interview. The in-person interviews will include collection of consent for administrative data collection, collection of Social Security number, completion of self-administered on-line cognitive assessments, collection of blood pressure, height, weight, and dried blood spots. We assume that 1,957 respondents will participate in the dried blood spot collection. Following collection of the dried blood spots, SRO interviewers will package and ship the dried blood spot cards to the laboratory chosen by ORL.</p> <ul style="list-style-type: none">• Our budget assumes up to 2,720 telephone interviews are completed and allows for at least six telephone attempts on all non-resistant cases with working telephone numbers. SRO will track and monitor contact attempts to examine the efficacy of contact windows in the first replicate of the sample.• The budget assumes approximately 2,003 cases complete the in-person component and 1,957 consent to the DBS collection.• Mileage costs for fieldwork are budgeted at 2,003 trips of no more than 120 miles per round trip.• Cash incentives of \$15,000 are included in the budget estimate to facilitate in-person payments to reluctant and hard-to-reach participants and individuals who are asked to assist in the location of these participants. All other participant incentive payments are the responsibility of Open.• Supplies/kits for DBS are included in the estimate consistent with our most recent project experience. Further discussion with the University of Washington laboratory may result in the refinement of the materials and method for drying the bio specimens and associated costs of project supplies. <p>SRO will conduct standard data cleaning and produce a preliminary and final dataset with documentation. Standard data cleaning does not include customization (such as derived variable or index creation, dataset merging, sample weighting, recoding, or coding of other-specify responses). We will ensure that all components of a case are present with a reference variable (SID, OID) to allow for merging and data analysis. Our main documentation is conveyed through data dictionaries and a questionnaire codebook.</p> <p>We have not budgeted for coding any open-ended responses.</p> <p>Deliverables:</p> <ul style="list-style-type: none">• SRO will provide daily, automated delivery of questionnaire data, cognitive tasks, and sample management system data for cases with a final disposition and sample management system data for all cases that have been released to interviewers.• Sample management data that will be delivered daily to Open will include the following case-level variables:<ul style="list-style-type: none">o Contact attempts? number by type (SMS, phone, email, in-person)? date/time of last attempto Appointments? date/time of scheduled appointments? occurrence of broken / missed appointments? how appointment was made (self-scheduler/by interviewer)o Current incentive assigned to the sample lineo SRO will work with Open during pre-production to finalize variables and format.• We will work with Open between completion of active data collection and end of the funding period for Endline to reconcile any outstanding discrepancies in the data.• SRO will also deliver:<ul style="list-style-type: none">o Daily data collection progress reportso A final summary of field methods at the end of data collectiono A full survey dataset with all participant contact information at the close of data collection.		

SRO Project Period	01/1996 - 01/1996			
Data Col Period				
Security Plan	NA			
Milestones	<div> <div> Pre Production Start: 09/01/2022 Pretest End: Staffing Complete: 02/27/2023 SS Train Start: 03/20/2023 DC Start: 03/27/2023 </div> <div> Pretest Start: Recruitment Start: 02/01/2023 GIT Start: SS Train End: 03/24/2023 DC End: 08/19/2023 </div> </div>			
Other Project Team Members	In addition to the above: Ian Ogden (SSS, Tech Coordinator); Anna Fuqua-Smith (SSI); Austin De Spirito (SSA); Jeff Smith (Tech Lead); Marsha Skoman (SurveyTrak); Heuchun Peng and Shaowei Sun (Self-Scheduler); Peter Sparks & Kelly Liesko (Blaise); Stephanie Windisch and Jennie William (Data Management); Ashwin Dey and Darnell Franklin (Webtrak, Weblog, Reports)			
Other Project Name				
Sample Mgmt System	SurveyTrak; Project specific system (Self-Scheduler for Telephone)			
Data Col Tool	Blaise 4.8; Other (ArcGIS - Survey 123)			
Hardware	Laptop; [UM cell] Phone			
DE Software	N/A			
QC Recording Tool	DRI-CARI			
Incentive	Yes, R; Yes, INF			
Administration	SRO Group; Other (PI Payment)			
Payment Type	Cash, post (\$10 or \$20 For Dried Blood Spots); Other (\$20 Finders Fee)			
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)			
<hr/>				
Report Period	Apr, 2023 (EDC-Endline)		Implementing	
Risk Level	On Track			
Monthly Updates	Production continues to go well.			
Special Issues	NONE			
Cost as of May 17, 2023	Total Cost to Date (direct + indirect):		538,382.61	
	Est Cost at Completion (E\$AC):		1,597,776.23	
	Total Budget:		3,097,511.00	
	Variance (Total Budget minus- E\$AC):		1,499,734.77	
	Reason for Variance:		NA	
Projections as of May 17, 2023	Dollars Projected for Month:		261,091.59	
	Actual Dollars Used:		179,859.50	
	Variance (Projected minus Actual):		81,232.09	
	Reason for Variance:		Hourly: • ST II's were 736 hours under projections. Hours variance for the month was 1141.17 hours under projections. Non Salary: • Hosting was projected but did not come in, moved that projection forward to May already. \$2,000 in Printing and Reproduction projected but no expenses this month. Non Salary variance was \$36,729.51	
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(HCAP 2022) Healthy Cognitive Aging Project, 2022		
Project Mode	Primary: Face to Face	Secondary: Telephone	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,300,000.00	Indirect Budget: 1,188,000.00	Total Budget: 4,488,000.00
Principal	Kenneth Langa (SRC)		
Investigator/Clients	David Weir (SRC)		
Funding Agency			
IRB	HUM#: HUM00099822		Period of Approval:
Project Team	Project Lead: Maureen Joan O'Brien		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Margaret Lavanger		
	Senior Project Advisor: Evanthia Leissou		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>This project will involve the completion of a face-to-face CAPI interview, designed to provide a dementia assessment of HRS respondents. A sample of 5000 respondents (one per household) who are 65 years of age or older will be selected for this effort. The questionnaire is a series of 15 cognitive tests and will be administered to respondents after the HRS 2022 interview has been completed. The sample will not be clustered geographically; it will be selected randomly. It is expected that the field team will carry out well-planned regional trips in order to complete the 3,530 in-person interviews. An informant interview will also be completed for each of the respondents interviewed.</p> <p>The respondent questionnaire length is expected to be 60 minutes. The informant questionnaire is expected to be 20 minutes and can be administered in-person after the R interview, or by telephone/mail if FTF is not available.</p>		
SRO Project Period	01/2022 - 12/2023		
Data Col Period	07/2022 - 09/2023		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 04/01/2022</div><div>Pretest End: 05/21/2020</div><div>Staffing Complete:</div><div>SS Train Start: 07/13/2022</div><div>DC Start: 07/18/2022</div></div> <div><div>Pretest Start: 05/01/2020</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End: 07/15/2022</div><div>DC End: 08/31/2023</div></div>		
Other Project Team Members	PDMG: Tony Romanowski, Lisa VanHavermaet, Megan Hromco, Kristen Cross. TSG: Jeff Smith, Brad Goodwin, Valyn Dall, Peter Sparks, Ashwin Dey, Deb Wilson		
Other Project Name	Harmonized Cognitive Assessment Protocol		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone		
DE Software	Blaise 4.8 BIA		
QC Recording Tool	NA		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (50); Cash, post (25)		
Payment Method	Check through STrak RPay System		

Report Period	Apr, 2023 (HCAP 2022)	Implementing
Risk Level	Some Concerns	
Monthly Updates	<p>Cost projections have been updated in CRS but some fields were locked in MPR and could not be edited. Below is the up-to-date total projected overrun: Direct: (191,826.81) Indirect: (\$69,057.71) Total Variance: (\$260,884.52)</p> <p>The PI has committed to allocating an additional 190k direct funds to cover this overrun.</p> <p>The PI has signed off on a small 8-lwer 3-day training as well as extending data collection by up to 8 weeks, to the end of October rather than August 31, to help meet production goals. Recruitment efforts are underway for a June 20-22 training for On-staffers only – the posting will go out today (5/17). Reports are that there are not many On-staffers with available time so we will monitor response to the posting closely.</p>	

HCAP production has been underway for 43 weeks. As of this morning, 3,469 interviews have been completed, including 1,583 R and 1,368 Inf. There are currently 239 appts (159 R, 80 Inf). The overall HPI is 4.76. 270 Spanish interviews have been completed (156 R, 114 Inf). There are currently 25 interviewers on staff. 303 more R sample lines were released to Iwers on May 9, for a total released sample size of 3563 Rs (7,126 including Inf) thus far.

Count and RR goals have been updated to reflect 190k in funds to be allocated for the production scenario estimated to result in a 64% RR. This includes the additional Iwer training as well as the extension. The original RR goal was 71%. Additionally, HCAP goals are dependent on HRS RR since only HRS completes that are HCAP eligible are pulled for HCAP. All current goals and estimates are based on a sample size of 6401 from HRS, and roughly a 74% HRS RR depending on the sample type. This would provide HCAP with a sample size of 4527. HRS will likely not reach a 74% RR. If this is the case, HCAP sample size will be slightly lower and RR higher. It is too early at this point to adjust sample size expectations and goals.

The PI has asked us to consider how an additional 100k might boost production even further. If this were the case, we would need to hire an additional 4 interviewers. If recruitment for the June training is going well, we will communicate this to the PI and discuss this 100k in more depth. We have provided a cost scenario to the PI accounting for this additional 100k and 4 additional Iwers. With this scenario and the HRS sample size of 6401, we would expect a final RR of 68%, 3089 R iws, and 2666 Inf iws. These numbers would change if the HRS available sample is indeed smaller than 6401.

We have begun conducting verbal consents with Informants using the new Inf brochure mailings since this new protocol has been IRB approved. This is going well. Rs who have an Inf iw has increased by 2% since this has been implemented, and reports from Iwers are that this protocol is efficient.

The HRS Proxy WBD consent in HCAP has been approved. The HRS Proxy sample who are flagged for HCAP and whose Blaise data indicates they are not a Proxy due to cognitive issues, is currently being identified. They will be flagged in Surveytrak. The procedure of the Iwer requesting WBD from them will be a manual process with the count is so low and there was no benefit to making additional systems changes in Surveytrak and Blaise at this point. This sample that consents will be passed back to HRS for them to forward to ExamOne to be live scheduled for a WBD appt.

Special Issues		Production training and production launch were postponed to Summer, 2022 due Covid19 pandemic. We are projecting an overrun due to the inflation over 2-year delay, continued low-level management over this 2 years, increased sample size between 2020 and 2022, and a budget cap in 2020.		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):			2,803,951.99
	Est Cost at Completion (E\$AC):			4,748,884.52
	Total Budget:			4,488,000.00
	Variance (Total Budget minus- E\$AC):			-260,884.52
	Reason for Variance:	There was a budget cap in 2020 while goals remained at high level, project has stretched 2 additional years with low level of management, inflation since budget created in 2018.		
Projections as of May 15, 2023	Dollars Projected for Month:			288,825.32
	Actual Dollars Used:			203,574.39
	Variance (Projected minus Actual):			85,250.93
	Reason for Variance:	Respondent costs not used this month, pushed forward, plus low Iwr hours - those are pushed forward as well.		
Measures		Units at Complete	RR	HPI
	Current Goal:	3460		4.7
	Goal at Completion:	5536	64%	4.8
	Current Actual:	3469	53%	4.76
	Estimate at Complete:	5536	64%	
	Variance:			
Other Measures		Iw counts include R + Inf. RRs include Rs only. At this point, 83% of Rs have a corresponding Inf iw. We expect ~88% of Rs to have a corresponding Inf iw at the end of data collection.		

Project Name	(Health and Well Being in SE MI) Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Project Mode	Primary: Face to Face Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,409,055.00	Indirect Budget: 1,349,072.00	Total Budget: 3,758,127.00
Principal	Kristine Ajrouch (Life Course Development Program, SRC)		
Investigator/Clients	Toni Antonucchi (Life Course Development Program, SRC)		
	Laura Zahodne (Life Course Development Program, SRC)		
Funding Agency			
IRB	HUM#: HUM00146040	Period of Approval: 4/9/2020	
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Tagh Reid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 600 interviews with recently identified Arab Americans aged 65 or older residing in Southeast Michigan and 330 interviews with Social Relations sample members aged 65 or older. The Arab American sample will be selected based on an in-person household screening. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements. Social Relations respondents will only complete the cognitive interview. An informant interview will also be conducted for all sample members. Interviews will be conducted in English or Arabic.		
SRO Project Period	05/2019 - 03/2023		
Data Col Period	05/2023 - 03/2024		
Security Plan	No		
Milestones	<div><div>Pre Production Start: 12/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End:</div></div>		
Other Project Team Members	Tagh Reid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Detroit Aging and Memory Project (formerly Health and Wellbeing in Southeast Michigan)		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		
Report Period	Apr, 2023 (Health and Well Being in SE MI)		Implementing
Risk Level	Attention!		
Monthly Updates	During April 2023, SRC activities on the DAWN projects included the following: Task 1: Management, Budget and Work Plan <ul style="list-style-type: none">• Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS.• Financial<ul style="list-style-type: none">o Prepared cost reports and reviewed monthly expenses.o Finalized projections and entered them into the cost reporting system• IRB – prepared updated questionnaires and “track changes” documents for IRB.• Procurement<ul style="list-style-type: none">o Continued procurement for study supplies for both D-Amp and SRS. Supplies were purchased interviewer duffle bags, prenotification mailings.• Technical systems & Questionnaires<ul style="list-style-type: none">o Continued work to update/finalize specifications for the main interview, physical measures and cognitive sections.		

- o Conducted repeated rounds of testing on all instruments and on the sample management systems
- o Updated and formatted Respondent Booklets for Main & Informant
- o Continued updates to the Arabic informant questionnaire, QxQs and respondent booklet.
- o Conducted rounds of testing on the screener application. Conducted automated testing on the screener application.
- Training preparation
- o Reviewed and revised study-specific training agenda.
- o Began drafting chapters for the project manual.
- o Began preparing powerpoint presentations
- Production preparation
- o Began printing materials and items needed for production
- o Began counting items for interviewer supplies
- o Worked with kitting vendor to finalize materials for kitting

Task 2: Sampling

- Began planning for DAWN sample monitoring dashboard.
- Ordered sample from MSG
- Began preparation of sample for production
- Provided programming group with updated specifications for testing
- Provided input for field progress reports

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments
- Began work to prepare Arabic specifications for updates
- Updated Arabic QxQs for the Interview Informant questionnaire

Task 4: CAI Programming

- Continued bug fixing on the screener instrument (English & Arabic)
- Updated QDRS programming on the Informant Interview, fixed bugs and issues
- Updated programming in all sections of the Main interview, conducted repeated rounds testing and bug fixes

Task 5: Systems Programming

- Continued programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
- Continued programming changes to SurveyTrak Main D-Amp project.
- Conducted continued rounds of testing/bug fixes to all sample management instruments

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
- o Received bids for July training sites, reviewed and presented bids
- o Accepted bid from the Westin Southfield for July training
- Interviewer recruitment
- o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
- o Attended hiring fairs, posted flyers and updated advertisements
- o Made offers to selected candidates, processed hiring paperwork and requested background checks. 28 total interviewers processed and hired for Training 1.
- o Began planning and preparations for recruitment & hiring efforts for Training 2 (July).
- Training
- o Met weekly to finalize plans for interviewer and team leader training
- o Prepared and shipped home study materials for team leaders
- o Prepared training materials for interviewers

Task 8: Main Data Collection

- Developed logistics and staffing plans for printing study materials, packing duffle bags and interviewer bulk supplies
- Coordinated with ISR Business Office to ensure supply of \$2 bills for prenotification letters

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

Areas Needing Special Attention Schedule

- DMSS requested a change to the programming for the screening instrument on May 12. This will require revamping the screener programming and significant testing -- an added, unanticipated expense to the project. About 100 sample lines are being held back from production launch until this change can be made.
- The project is experiencing significant attrition before & at the first training. 28 interviewers were hired, at present (May 21), 17 remain in training.
- Preparation of all instruments is running severely behind schedule. The project will launch without full functionality in production monitoring programs. This is because of both a lack of capacity to prepare specifications and a lack of capacity in programming resources.
- Interviewer attrition before and at training is high. 28 interviewers were recruited. We are down to 17 interviewers going into certification at the first training.

• Financial:

o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.

? Blaise programming will be over budget due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.

? SurveyTrak programming will be over budget due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It was also more difficult that expected to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.

• Schedule

o Programming is running behind schedule due to issues noted above.

? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English. These items are necessary for training.

? The Arabic version of the main questionnaire, informant interview and the proxy questionnaire (English & Arabic) will not be ready for the May 30 study launch. We will advise as soon as feasible on a possible launch date.

Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	1,221,474.52
	Est Cost at Completion (E\$AC):	3,757,806.46
	Total Budget:	3,758,127.00
	Variance (Total Budget minus- E\$AC):	320.54
	Reason for Variance:	The variance is insignificant at this time.
Projections as of May 15, 2023	Dollars Projected for Month:	115,140.20
	Actual Dollars Used:	97,525.57
	Variance (Projected minus Actual):	17,614.63
	Reason for Variance:	The monthly variance is due to non-salary costs. Kitting for production is behind schedule due to late delivery of IRB-approved documents from the research team. We expect kitting costs to hit in May or June. Printing for production is also running later than expected due to delays in receiving IRB-approved documents.

Measures		Units at Complete	RR	HPI
	Current Goal:	930 main, 930 inf	varies	11.65 w/screen, inf
	Goal at Completion:	930 main, 930 inf		
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(HRS 2022 Panel & Baselines) Health and Retirement Study 2022 Main Interviews		
Project Mode	Primary: Mixed Total of Modes: 3		
Project Type	Sponsored Projects		
Budget	Direct Budget: 13,982,815.00	Indirect Budget: 5,033,815.00	Total Budget: 19,016,630.00
Principal Investigator/Clients	David Weir (ISR-SRC)		
Funding Agency			
IRB	HUM#: HUM000611128	Period of Approval: 9/8/2021 to 9/7/2022	
Project Team	Project Lead: Evanthia Leissou		
	Budget Analyst: Richard Warren Krause		
	Production Manager: Andrea Sims		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Deborah Zivan		
	Production Manager 2: Jennifer C Arrieta		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of people aged 50 years and older in the U.S.. Every six years (three waves) a new cohort of people aged 50 to 55 are screened in to the study to maintain a representative sample. A series of physical measures and bio-markers are collected with half of all living respondents each wave as well as a self-administered questionnaire. Additionally, permission to link to Social Security Administration records is requested.		
SRO Project Period	01/2021 - 09/2023		
Data Col Period	03/2022 - 07/2023		
Security Plan	NA		
Milestones	<div>Pre Production Start: 01/01/2021Pretest Start: 11/01/2021Pretest End: 11/23/2021Recruitment Start: 08/01/2021Staffing Complete: 01/15/2022GIT Start: 02/21/2021SS Train Start: 02/23/2022SS Train End: 03/03/2022DC Start: 03/07/2022DC End: 06/30/2024</div>		
Other Project Team Members	<div>Derek Dubuque (Production Manager), Andrea Sims (Production Manager), Theresa Camello (Production Manager), Taghreid Lovell (Production Manager), Milagros Hierro (Production Manager), Deborah Zivan (Project Manager), Andrew Hupp (Project Manager), Gary Hein (Project Manager), Erin McSpadden (Project Manager), Daniah Buageila (Project Manager), Janet McBride (Project Assistant), Paul Burton (Stats/Sampling), Vanessa Clarke (Project Assistant), Jeannie Baker (Project Manager), Melissa Luker (Project Assistant), Anthony Romanowski (Project Manager), Megan Hromco (Project Assistant), Kristen Cross (Project Assistant), Austin De Spirito (Project Assistant)</div> <div>Tech Team: Karl Dinkelmann, Jeff Smith, Jim Rodgers, Laura Yoder, Marsha Skoman, Ashwin Dey, Pam Swanson, David Bolt, Deb Wilson, Jennie Williams, Rose Zybdel, Stephanie Windisch, Holly Ackerman, Shane Empie, Kelly Chatain, Brianna Sabol</div> <div>Coding Lead: Carolyn Vieira-Martinez</div>		
Other Project Name	HRS 2022 Main lws		
Sample Mgmt System	SurveyTrak; MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 Coding Application); External vendor (DataForce Scanning SAQs)		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	NA		
Payment Type	Check, prepaid (80.00); Check, post (\$50 (WBD), \$20 (SAQ))		
Payment Method	Check through STrak RPay System; Check through other system (Rpay system set up for MSMS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (Rpay system set up for MSMS); Imprest Cash Fund from ISR Business Office (Rpay system set up for MSMS)		

Report Period	Apr, 2023 (HRS 2022 Panel & Baselines)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Throughout the month of April, - The project team has been working on production monitoring, sample management, logging, weekly mailings (SSA and SAQ), payment and letter request processing, and training preparations. Interviewer training took place		

from 4/19 to 4/25. The April trainees will begin production with screening and baseline interviews and then after a few weeks will be trained to conduct panel interviews.

- DMSS made updates to reports.

- Limited effort protocol continues with minimal impact to the field staff (777 SIDs pulled from field as of 5/17/23).

- Priority/Increased token flagging of Panel and EgenX sample and non-priority Panel eFTF mode switch protocols continued. As of 5/17/23, 19% of the 3,006 high priority cases have completed an interview; 8% of the 1,451 Panel eFTF mode switch cases have completed an interview.

*As of 5/17/23, the "measures" table reflects both Panel and Baseline interviews combined.

Special Issues	<ul style="list-style-type: none">- Concerns about meeting Panel interviewing goals even with the additional three months of field time due to current interviewer count and balancing effort with new cohort screening/baseline iws. Project team is working with the client on responsive design options to implement as well as with the field staff on sample management strategies but, as of 5/17/23, we still need over 3,000 panel interviews to reach goal.- Multiple Blaise issues that have impacted STRak and MSMS throughout data collection.- Competing project team demands with HRS 2022 in data collection at the same time as 2023 mail surveys and HRS 2024 preproduction.			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):		14,867,892.27	
	Est Cost at Completion (E\$AC):		18,750,822.87	
	Total Budget:		19,016,630.00	
	Variance (Total Budget minus- E\$AC):		265,807.13	
	Reason for Variance:	The change in variance between March and April cost reports is due to Panel interviewer hours and staff hours coming under projections (under 18% for interviewers and 31% for staff) in the month of April. The change in variance between February and March cost reports was due to a reevaluation of the respondent incentives needed for the remainder of panel data collection. Summary for the wave: CRS is projecting the contingent fringe benefits with the newly approved 10.4% rate to accommodate ACA costs, the \$400 signing bonus for field staff, Field interviewer and SurveyTech base rate increase, an extra day added to February production training, the increase in per mile reimbursement for travel. CRS is now using the actual lwer rates for projecting lwer costs and travel projections were removed from the recruitment task. The Casic recharge rate and Field Ops rate increases, increased mileage costs for remaining interviews, the Field lwer and SurveyTech rate increases have been updated in CRS, the increase in recharges to the lwer-Trainee hours as well as the reduction in the CAPI rate. The additional interviewer hours needed to reach panel interview goals have been applied to CRS.		
Projections as of May 15, 2023	Dollars Projected for Month:		585,294.45	
	Actual Dollars Used:		428,203.75	
	Variance (Projected minus Actual):		157,090.70	
	Reason for Variance:	Interviewer and staff hours were less than what had been projected for the month. Non-salary costs for respondent payments, travel, and printing were also under projections. The non-salary costs were pushed forward to future months.		
Measures		Units at Complete	RR	HPI
	Current Goal:	13,845	51%	8.8
	Goal at Completion:	22,661	62%	8.2
	Current Actual:	13,857	51.5%	9.1
	Estimate at Complete:	22,661	62%	11.7
	Variance:	0	0	3.5
Other Measures	Panel: Goal RR: 74%, Current RR: 59.0% (Panel end date 7/29/23) 2022 Baselines generated from screener: Goal RR: 44%, Current RR: 17.9% 2019 EGenX baselines: Goal RR: 70%, Current RR: 62.0%			

Project Name	(HRS HOC) Health and Retirement Study – Historical Occupation Coding		
Project Mode	Primary: Data Processing		
Project Type	Sponsored Projects		
Budget	Direct Budget: 67,762.90	Indirect Budget: 24,394.16	Total Budget: 92,157.06
Principal	David Weir (SRC)		
Investigator/Clients	Amanda Sonnega (SRC)		
Funding Agency	NIA		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Gloria J Baker		
	Budget Analyst: Cindy Tsao		
	Production Manager: Carolyn Vieira-Martinez		
	Senior Project Advisor: Jennifer C Arrieta		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	HRS Staff will provide SRO with the text description of approximately 10,000 occupations reported in interviews completed during 1994-2002 waves of data collection. The Survey Services Laboratory (SSL) will complete a crosswalk between the 1980 and 2010 occupation census codes as well ass occupation re-coding for jobs reported during the 1994-2002 waves of HRS data collection, using 2010 Census codes. Coding for these occupations was completed in the past using 1980 Census codes.		
SRO Project Period	09/2022 - 06/2024		
Data Col Period			
Security Plan	NA		
Milestones	Pre Production Start:		
	Pretest End:		
	Staffing Complete:		
	SS Train Start:		
	DC Start:		
Pretest Start:			
Recruitment Start:			
GIT Start:			
SS Train End:			
DC End:			
Other Project Team Members			
Other Project Name	HRS Historical Coding		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	Desktop		
DE Software	Other (Coding Application)		
QC Recording Tool	NA		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Apr, 2023 (HRS HOC)		Planning
Risk Level	On Track		
Monthly Updates	During the month of April, - Jeannie participated in meetings with the PI and budget analyst. - Project is moving forward, but HRS staff is experiencing some delays setting up variable tables for historic data. This will likely push back SSL coding activities to July 2023.		
Special Issues	- Delay of original coding work scope to now begin in July 2023. - PI with the most coding experience/knowledge left the organization shortly after start of project - SRO's staff member with the most HRS coding experience/knowledge informed project team in mid-January that he will be retiring the first week of February allowing for a very short transition of knowledge to the newly assigned coding lead.		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):		18,711.15
	Est Cost at Completion (E\$AC):		80,312.40
	Total Budget:		92,157.06
	Variance (Total Budget minus- E\$AC):		11,844.66
	Reason for Variance:		Variance is due salary as a result of moving Stan Hasper's hours to Carolyn Vieira-Martinez and fewer project management hours needed

for coordinating with HRS staff during the planning phase.

Projections as of May 15, 2023	Dollars Projected for Month:	6,236.37
	Actual Dollars Used:	692.52
	Variance (Projected minus Actual):	5,543.85

Reason for Variance:

Not as much project management that was projected has been needed at this point in the planning phase. Due to initial project delay, coding hours have not been utilized. Coding to begin in July 2023 so unused hours for project management, system set up, and coding will be pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(HRS2022-Screening) HRS 2022 - Screening		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 3
Project Type	Sponsored Projects		
Budget	Direct Budget: 21,264,149.00	Indirect Budget: 7,655,093.00	Total Budget: 28,919,242.00
Principal Investigator/Clients	David Weir (SRC) Helen Levy (SRC) Ken Langa (SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Evanthia Leissou Budget Analyst: Richard Warren Krause Production Manager: Senior Project Advisor: Nicole G Kirgis Production Manager 1: Andrew L Hupp Production Manager 2: Theresa Camelo		
Proposal #	no data		
Description	The Health and Retirement Study (HRS) is a national, longitudinal study conducted every two years since 1992. The study includes a representative sample of US residents aged 50 years and older. Every six years (three waves) a new cohort of US residents aged 50 to 55 are screened in to the study to maintain representativeness. In 2004, the early baby boomers were screened in and completed a baseline interview. In 2010, the mid baby boomer cohort was added as well as a minority oversample of both early and mid-baby boomers. In 2016, the late baby boomer cohort was added. In 2022, group 1 of the early generation x cohort will be added along with a minority oversample.		
SRO Project Period	02/2021 - 01/2024		
Data Col Period	03/2022 - 01/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: 04/19/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other ((Blaise) Case Management App (CMA))		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Blaise 5 web instrument); N/A		
QC Recording Tool	Camtasia; N/A		
Incentive	Yes, R; Yes, INF		
Administration	SRO Group		
Payment Type	Check, post; Cash, prepaid (\$2); Cash, post		
Payment Method	Check through STrak RPay System; Interviewer payment of cash (reimbursed/reconciled via Tenrox); Imprest Cash Fund from ISR Business Office		
<hr/>			
Report Period	Apr, 2023 (HRS2022-Screening)		Implementing
Risk Level	Some Concerns		
Monthly Updates	<p>Batch 4 sample continues to be released on a flow basis. The endgame strategy was submitted and approved by the IRB. We anticipate starting that sometime in June. We need to work through some operational related items (e.g., figuring out what cases need to be loaded in MSMS so they can potentially access the web survey, and making sure we have the infrastructure in place to be able to report on progress). We have begun returning cases to the field for additional effort to either be completed or reach the eligibility for the endgame strategy.</p> <p>After analyzing the productivity of the SSL calling we recommended to the PIs (and they agreed) that we should stop calling. We screened 64 out of the 1,668 cases we sent to phone follow-up. The HPS in the SSL was 13.8. The resistance rate per contact was ~42%. We spent most of the time dead-ending the phone numbers we purchased from MSG. Those hours are better spent in the field.</p> <p>A larger training of ~110 is happening in April. Those staff are now in the field screening. We have been hitting the production goals for several weeks now. SRO and sampling team have been working together on the sample design. We will subsample MOC strata as we are doing well with MOC recruitment. After a discussion with the</p>		

sampling team and the PIs we will be sorting addresses (and possibly listing) ~200 segments in the reserve sample. We will likely do that work later this summer.

We have had discussions with the PIs about how many baseline interviewers we need to have done by the end of calendar year 2023. The goal is to have 50% (or more) of the EGENX goal (4,500-5,200), and all of the MOC goal (2,000).

Special Issues

Cost as of May 17, 2023	Total Cost to Date (direct + indirect):	10,348,377.46
	Est Cost at Completion (E\$AC):	29,380,529.82
	Total Budget:	28,919,242.00
	Variance (Total Budget minus- E\$AC):	-464,281.82
	Reason for Variance:	Project staff is aware of the current projected overrun. Added projections for increased number of new hires for the April training (100 ->130), increased the number of days (6->8), and added additional time for DCS training group for the April training.
Projections as of May 17, 2023	Dollars Projected for Month:	998,407.08
	Actual Dollars Used:	649,364.52
	Variance (Projected minus Actual):	349,042.56
	Reason for Variance:	The largest contributors to the variance were spending less in unused respondent payments, overall hours (~1,200) and unused travel. Most of those costs were pushed forward.

Measures		Units at Complete	RR	HPI
	Current Goal:	3,600/1,500 HHs	73%	3.0
	Goal at Completion:			
	Current Actual:	1,616/1,704	34.6%	4.27
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(IHDS3) India Human Development Survey Wave 3		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 358,900.61	Indirect Budget: 200,983.92	Total Budget: 559,884.53
Principal Investigator/Clients	Sonalde Desai (University of Maryland)		
	Stephanie Chardoul (University of Michigan)		
	Santanu Pramanik (National Council of Applied Economic Research)		
Funding Agency	National Institutes of Health, Department of Health and Human Services		
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Ryan Neice		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Sarah Elisa Broumand		
	Production Manager 2: Sarah Elisa Broumand		
Proposal #	no data		
Description	The India Human Development Survey (IHDS) is a nationally representative, multi-topic, longitudinal survey of 41,554 households in 1503 villages and 971 urban neighborhoods across India. The first round of interviews were completed in 2004-5; data are publicly available through ICPSR. A second round of IHDS reinterviewed most of these households in 2011-12 (N=42,152). SRC joins IHDS Wave 3 to automate data collection, the scope of work includes methodological design, sample design, questionnaire design, technical instrument design, supervisor/interviewer training, production monitoring, quality control, data dissemination, and 2-3 weekly conference calls for capacity building.		
SRO Project Period	01/2019 - 03/2024		
Data Col Period	05/2022 - 10/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Project Management Team Stephanie Chardoul -- Senior Project Advisor (SPA) Sarah Broumand - Project Manager Programming Team Collette Keyser - Blaise Marsha Skoman - SurveyTrak Holly Ackerman - WebTrak Cheng Zhou - Sync HelpDesk Team Emmanuel Ellis John Data Manager Team Sarah E Jennie		
Other Project Name			
Sample Mgmt System	Other (SurveyTrak INTL)		
Data Col Tool	Blaise 5		
Hardware	Laptop; Other (NCAER Phone (In India))		
DE Software	Other (TBD)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, Other (TBD)		
Administration	Other (TBD)		
Payment Type	Other (TBD)		
Payment Method	Other (TBD)		
Report Period	Apr, 2023 (IHDS3)		Implementing

Risk Level	Some Concerns			
Monthly Updates	<p>March was a busy month</p> <p>Prepared Production project for A07. We continue to push along releasing new languages and fixes to the Migrant data model and preload process as issues arise. System issues still remain a short list, we continue to get 2 or 3 items a week where lines don't spawn for some reason or another. and new lwers have caused increases of cases needing recovering or resetting</p>			
Special Issues				
Cost as of May 15, 2023	<i>Total Cost to Date (direct + indirect):</i>	568,945.41		
	<i>Est Cost at Completion (E\$AC):</i>	578,040.81		
	<i>Total Budget:</i>	559,884.53		
	<i>Variance (Total Budget minus- E\$AC):</i>	-18,156.28		
	<i>Reason for Variance:</i>	Unplanned issues with Blaise data models had to be fixed.		
Projections as of May 15, 2023	<i>Dollars Projected for Month:</i>	9,417.93		
	<i>Actual Dollars Used:</i>	10,066.40		
	<i>Variance (Projected minus Actual):</i>	-648.47		
	<i>Reason for Variance:</i>	very small variance		
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

Project Name	(MI CReSS (Year 3)) Michigan COVID-19 Recovery Surveillance Cohort Study		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 667,755.00	Indirect Budget: 173,620.00	Total Budget: 841,375.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00181068		Period of Approval: Exempt
Project Team	Project Lead: Sarah Elisa Broumand Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Nicole G Kirgis Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	<p>MI CReSS is a partnership between the University of Michigan School of Public Health (SPH) and the Michigan Department of Health and Human Services. It is a public health surveillance study to learn about Michiganders' experiences with COVID-19 using a representative sample of confirmed cases within the state. Using survey data, they plan to document sociodemographic inequities in COVID-19 testing, treatment, and recovery.</p> <p>SRO's involvement includes the administration of a Follow-up survey for respondents that completed a Baseline survey with the SPH team. Based on the sample information provided, we will be re-contacting approximately 3,995 respondents who have already completed (or are estimated) to complete the Baseline survey to administer the Follow-up survey.</p> <p>The Follow-up survey is estimated to be 45 minutes in length, and Respondents will be encouraged to complete the survey by web. However, SRO Interviewers will contact non-responders and conduct the interview over the telephone if the Respondents do not want to complete the survey on the web.</p>		
SRO Project Period	08/2021 - 09/2023		
Data Col Period	01/2022 - 07/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: 11/29/2021 DC Start: 01/26/2022 </div> <div> Pretest Start: Recruitment Start: 09/16/2021 GIT Start: SS Train End: 12/02/2021 DC End: 07/07/2023 </div> </div>		
Other Project Team Members	Bill Lokers: Financial Analyst Megan Hromco: Production Assistant Hueichun Peng: Technical Lead / WSMS db Programmer Peter Sparks: CAI Programmer (Blaise 5) Cheng Zhou: Web Component, ADT, Reports LihShwu Ke: DBA Architecture & Data Security Sarah Broumand: Data Manager Deb Wilson: Help Desk		
Other Project Name			
Sample Mgmt System	Web SMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$25)		
Payment Method	NA		
Report Period	Apr, 2023 (MI CReSS (Year 3))		Implementing
Risk Level	On Track		
Monthly Updates	Sample replicate 14 was released as planned. Release 10 extended reminder calling for a few weeks due to a low response rate that we suspect was affected by technical issues with Arealink (discovered back in October that		

messages were not sent out). However we were able to finally reach an 80% response rate and finish Release 11 on time, first time in several months.

The project lost a few field staff that had to join PSID, so we then had to hire and train 2 additional staff.

One goal of the project was to achieve a 60/40% breakdown of Web versus CATI lws. We currently have a 70/30% breakdown for releases 1 through 14 so far. For the next two releases, 15 and 16, we will be experimenting delaying Reminder Calling for about 3 weeks to hopefully improve HPI's and the Web/CATI lws breakdown even further.

Special Issues

Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	297,388.95
	Est Cost at Completion (E\$AC):	727,275.34
	Total Budget:	841,375.00
	Variance (Total Budget minus- E\$AC):	114,099.66
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Projections as of May 15, 2023	Dollars Projected for Month:	62,699.27
	Actual Dollars Used:	44,990.11
	Variance (Projected minus Actual):	17,709.16
	Reason for Variance:	New funding was just added and still need to work with financial analyst to balance out the hours.

Measures		Units at Complete	RR	HPI
	Current Goal:	4,813 (Rel 1-15)	80% (60%-Web/40%Tel)	2.25
	Goal at Completion:		80% (60%-Web/40%Tel)	
	Current Actual:	3,406	71% (71%-Web/29% Tel)	4.78
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(MTF Base Year 2022_27) Monitoring the Future Base Year 2022-2027		
Project Mode	Primary: Class SAQ Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,267,988.00	Indirect Budget: 3,510,072.00	Total Budget: 9,778,060.00
Principal	Richard Miech (SRC)		
Investigator/Clients			
Funding Agency	National Institute on Drug Abuse, one of the National Institutes of Health.		
IRB	HUM#: 00217920	Period of Approval: from 7/20/22 No CR	
Project Team	Project Lead: Rebecca Gatward Budget Analyst: Dean E Stevens Production Manager: Margaret Lavanger Senior Project Advisor: Gregg Peterson Production Manager 1: James Koopman Production Manager 2:		
Proposal #	no data		
Description	<p>Since 1975 the MTF survey has measured drug and alcohol use and related attitudes among adolescent students nationwide. A nationally representative sample of survey participants report their drug use behaviors across three time periods: lifetime, past year, and past month. The survey is funded by the NIDA, a component of the National Institutes of Health (NIH), and conducted by the University of Michigan.</p> <p>It is based on two interconnected series of surveys using nationally representative samples:</p> <p>(a) self-administered annual in-school surveys of 8th, 10th, and 12th graders (~45,000) in 400 schools. Proctors (SRO interviewers) coordinate and administer the data collection in schools (either FTF or remotely without visiting the schools).</p> <p>(b) panels of high school graduates aged 19-30, 35, 40,45, 50, 55, and 60 (now primarily surveyed by web). Panel members aged 19-30 are invited to participate every other year/asked to complete a web survey and the older sample members are sent questionnaires (mail and web) at five-year interval. The MTF panel study has three parts - early in the year a newsletter is mailed to panel members. If the newsletter is returned (undelivered) locating effort targets these panel members and others who have not participated for X years. The web panel launches (web) in spring and in around June a telephone non-response effort begins for those invited to participate. The panel members are recruited from the 12th graders who participate in the base year study.</p> <p>Press releases and published results can be found here.. http://www.monitoringthefuture.org/</p>		
SRO Project Period	04/2022 - 03/2027		
Data Col Period	04/2022 - 03/2027		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Hueichun Peng Technical Lead (WebSMS programmer) Brad Goodwin (+Ed Green) Data Management Ashwin Dey SurveyTrak, WebTrak and MTF specific Apps. Programmer Deborah Wilson and Brendon Carroll Help Desk/Tablet support		
Other Project Name			
Sample Mgmt System	SurveyTrak; Web SMS; Illume		
Data Col Tool	Illume		
Hardware	Laptop; Tablet; [UM cell] Phone		
DE Software	Illume		
QC Recording Tool	N/A		
Incentive	Yes, Other (Honorarium paid to school by MTF Research staff)		
Administration	ISR Group		
Payment Type	NA		
Payment Method	Check through other system		

Report Period	Apr, 2023 (MTF Base Year 2022_27)		Implementing
Risk Level	Some Concerns		
Monthly Updates	April 2023 - To date (5/16) the survey has been administered in 209 schools and 20,894 students have completed the survey - RR 84%. Interviewers visited 194 of these schools to proctor in person. Surveys in the remaining schools (n=15)		

were coordinated by the interviewer without visiting the school.

- The number of recruited schools passed to SRO interviewers to conduct the survey administration protocol is lower than in previous years (286 compared to 349 in 2022 - in 2019 the number of schools was closer to 400). Recruiters are finding it much more difficult to recruit and then complete all the administrative steps they need to before the school is passed to interviewers. Interviewers are being asked to make FTF visits (and other contact attempts) to help gather the details they need to. This year the callers and interviewers have made FTF visits to schools in order to recruit the schools (the process that begins during the later summer in the previous year). We expect that SRO interviewers will be asked to help with FTF recruitment in September/October in preparation for the 2024 wave.

-

Special Issues

Background below.

Update 5/16 - the contract for the perpetual license is very close to being signed (current license expires on May 31st). MTF surveys will transition to Qualtrics from 2024 data collection waves. We have an agreed plan and work has begun (by the MTF Research team) to program the surveys in Qualtrics. Hueichun has spent some time exploring Qualtrics functionality and the APIs available.

Illume has been the Computer Assisted Self-Interviewing (CASI) software used for production on MTF Panel since 2017 and Base Year since 2021.

The company, DatStat, which own and support Illume recently became part of R1 RCM Inc. (Revenue Cycle Management Company). In late January, we learned that this new parent company would be ending product support for Illume. Apparently, the Illume software is no longer an important part of their portfolio.

Following some negotiations, we have now received notification that SRC's official end date for support will be May 31st 2023. We also received a draft contract for a no cost perpetual license to use the software with no support (along with the source code). The license, and platform, would be provided "as is, with all faults" and would be unsupported. We are responsible for hosting our own instance of the Illume platform. The contract has been reviewed by Marcus Blough (CMT) and is currently being reviewed by UM procurement. We expect to be given the go ahead to sign the contract.

As we are self-hosted and self-sufficient in supporting Illume Marcus Blough feels that it is safe to continue using the software until the end of this calendar year but that we should begin looking for a new platform for 2024 data collection.

We are currently working on reviewing Blaise and Qualtrics capabilities against the functional requirements for MTF (base year and panel).

Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	1,329,349.32
	Est Cost at Completion (E\$AC):	8,185,233.17
	Total Budget:	9,778,060.00
	Variance (Total Budget minus- E\$AC):	1,592,826.83

Reason for Variance:

Current projections result in a large underspend for the five year grant period.

A client report (with notes) is provided to Nicholas Prieur every month so the MTF research staff are aware of projected cost to complete. In April I provided Nick with more details about interviewer costs and assumptions used for projections. The amount provided to SRO will probably decrease for future years to reflect the current scope of work (i.e. surveys completed in less schools and using the post pandemic protocols). I will be adjusting the projections for 2024 onwards based on completing survey administrations in 325 schools - rather than 400.

Not changed since last month (January) - left for info.

Projections for the five year period are based on current scope of work and the adapted protocol (introduced in 2021). The budget prepared for the proposal was based on the pre-pandemic design. The adapted protocol brings savings in the following categories: interviewer hours, travel, shipping and staff time (specifically hours required for loading and preparing tablets for shipping). For the past few years the number of schools recruited and passed to SRO has been lower than the number on which the budget is based (n=390), we have continued to base projections on achieving survey administrations in 390 schools. Wave 1 (2023)

- We have increased staff time (marginally) to prepare for the small pilot (six schools) to test methods to increase cooperation from 12th grade students to provide contact details.

We may also add some hours and expenses for FTF school recruitment trips that SRO has been asked to help with (given the lower response than is usual at this point, it is hoped that FTF visits may boost recruitment).

Projections as of May 15, 2023	Dollars Projected for Month:	167,709.08
	Actual Dollars Used:	163,868.79
	Variance (Projected minus Actual):	3,840.29

Reason for Variance:

The variance is quite small this month and is caused by small differences across many salary and non-salary categories.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(MTF Panel 2022-27) Monitoring the Future Panel 2022-2027		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 2,496,935.00	Indirect Budget: 1,398,282.00	Total Budget: 3,895,217.00
Principal	John Schulenberg (UM-SRC)		
Investigator/Clients	Megan Patrick (UM-SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Donnalee Ann Grey-Farquharson		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lloyd Fate Hemingway		
	Senior Project Advisor: Rebecca Gatward		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project is a continuation of MTF Illume Web 2021. PI staff will edit and test 12 survey versions, all previously programmed in Illume by SRO. SRO will further test the surveys as part of the systems integration process. All 12 surveys will be launched in 2021. After testing is complete, SRO will launch the 2021 Web survey data collection with an estimated sample size of 20,000 cases identified by the Principal Investigator who will deliver the contact information including e-mail address to SRO. The Web survey data collection will replace aspects of the standard mail-based data collection. Both the separately funded Winter Location calling effort and Non-Response follow-up calling will include this sample – with the calling effort being integrated with the standard MTF activities.		
SRO Project Period	01/2022 - 03/2027		
Data Col Period	04/2022 - 10/2026		
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	Rebecca Gatward (SPA), Donnalee Grey-Farquharson, Lloyd Hemingway, Hueichun Peng, Shaowei Sun, Peter Sparks, Ashwin Dey, Hongyu Johnson, Minako Edgar, Brad Goodwin		
Other Project Name	MTF		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (MTF Panel 2022-27)		Implementing
Risk Level	On Track		
Monthly Updates	<div>1. Management</div> <div>- MTF staff signed off the testing and started the production</div> <div>- Continues to monitor the production and the WebSMS</div> <div>2. System</div> <div>- System is ready for production.</div> <div>3. Data Collection - As of 04/30/2023</div> <div>-Total Released Sample = 18727</div> <div>-Total Completes = 4654</div> <div>- RR = 24.85%</div> <div>By comparing with the previous years (2022, 2021, 2020) at the similar time frame, we have higher RR in April 2023.</div>		

Special Issues

Cost as of Apr 30, 2023	Total Cost to Date (direct + indirect):	748,199.64
	Est Cost at Completion (E\$AC):	3,875,306.69
	Total Budget:	3,895,217.00
	Variance (Total Budget minus- E\$AC):	19,910.31
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Increased recharge rates are reflected.

Projections as of Apr 30, 2023	Dollars Projected for Month:	36,015.60
	Actual Dollars Used:	36,341.92
	Variance (Projected minus Actual):	-326.32
	Reason for Variance:	The total project amount includes MTF Web Illume as well as Non-Response Calling and Winter Location project. The overrun amount is MTF Panel 2022-2027 that was the combination of MTF Panel 2017-2022 and MTF Web Illume. Project team will revisit and streamline projections for future months.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(PR-PSID) Puerto Rico Panel Study of Income Dynamics		
Project Mode	Primary: Face to Face	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 828,581.00	Indirect Budget: 464,004.00	Total Budget: 1,292,585.00
Principal	Narayan Sastry (University of Michigan)		
Investigator/Clients	Elizabeth Fussel (Brown University)		
Funding Agency	NICHD, with supplemental funding being sought from NIA		
IRB	HUM#: HUM00197300	Period of Approval: 4/5/2022-3/22/24	
Project Team	Project Lead: Shonda R Kruger-Ndiaye		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Camila Kendall		
	Production Manager 2:		
Proposal #	no data		
Description	SRO will work with the PIs and a local survey firm in Puerto Rico, Estudios Técnicos (ETI), to develop a sample frame, sample design, questionnaire and data collection protocols for both pilot data collection (in 2022) and baseline data collection (in 2023). DMSS will provide assistance with sample design and implementation, responsive design, panel maintenance issues, and creation of sample weights. SRO will update the PSID-21 Spanish instrument for use specifically in PR. SRO will assist with the preparation of training materials for Listing training, Pretest and Main Data collection and will travel to PR to be on-site for these trainings. SRO will define reports for production and quality control monitoring that will be programmed through the SurveyTrak system, and train the research team on using these reports. All data will be collected by ETI's interviewers in PR and will be encrypted and transmitted daily via SurveyTrak to a secure SRC server. SRO will also assist with data processing.		
SRO Project Period	01/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 10/01/2021 Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Marsha Skoman--Tech Lead Raphael Nishimura--Sampling		
Other Project Name			
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, INF		
Administration	Other (ETI (Puerto Rican Survey Firm))		
Payment Type	Check, post (Varies by study phase); Cash, post (Varies by study phase)		
Payment Method	Other (Via ETI Systems)		
Report Period	Apr, 2023 (PR-PSID)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Contract with ETI finalized on 4/10. SRO/ETI held coordination kick-off meeting on 4/19. Will have weekly coordination check-ins going forward. SRO met with PSID to discuss the SID structure for PR-PSID. Need to ensure there is no overlap in SIDs across both projects. PI met with Center for New Economy (CNE) -- CNE is including PR-PSID in a proposal for additional funding to seek funding. May result in an increase of the sample size. SRO delivered final replacement segments to PR Listers. With the exception of QC edits, the Listing effort concluded on May 1st.		

SRO is finalizing the translation for Human Subjects Training and seeking approval to use the Protecting Human Research Participants Online Training & Certification as Human Subjects Training.

SRO delivered Batch 2 to the Translators (ISR Confidentiality Pledge). Still awaiting the deliverables from Batch 1.

ST Test project was created. HD is building laptops for testing.

Special Issues	Timeline concerns: ETI coordination, including hardware procurement, was delayed while we waited for the contract to be finalized. Translation work began later than expected. Still unsure of how quickly the translators will be able to turn around materials.			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	270,220.62		
	Est Cost at Completion (E\$AC):	1,242,617.59		
	Total Budget:	1,292,585.00		
	Variance (Total Budget minus- E\$AC):	49,967.41		
	Reason for Variance:	Updated TSG projections. Moved programming projections from App Programmer Sr, to App Programmer Intermediate.		
Projections as of May 15, 2023	Dollars Projected for Month:	42,296.66		
	Actual Dollars Used:	23,734.37		
	Variance (Projected minus Actual):	18,562.29		
	Reason for Variance:	Programming had not yet begun in April -- actuals for programming and tech roles were significantly lower than projections.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID CDS 2023) PSID Childhood Development Supplement 2023		
Project Mode	Primary: Mixed	Secondary: Face to Face	Total of Modes: 4
Project Type	Sponsored Projects		
Budget	Direct Budget: 0.10	Indirect Budget: 0.10	Total Budget: 0.20
Principal	Narayan Sastry (SRC)		
Investigator/Clients			
Funding Agency			
IRB	HUM#: HUM00166316	Period of Approval:	
Project Team	Project Lead: Piotr Dworak		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	A 2023 wave of the Childhood Development Supplement (CDS) is going to be conducted in two phases. Phase 1: from September 2023 – May 2024 and Phase 2: from June 2024 - January 2025. The sample for CDS is comprised of the PSID-eligible children (ages 0 -17) from the Core 2023 families we interview and their primary caregivers. Approximately 3,700 families will be included, with some Core families containing several CDS children. As part of the CDS Phase 1, families are asked to complete phone coverscreen and PCG interviews followed by mixed Adolescent 12 - 17 phone/web interview (including an IVR component in phone mode). In Phase 2 families will be visited in person (where possible) and asked to complete Child 8 - 11 interviews (via Video if out of area), provide physical measurements, educational assessments, saliva collection, time diaries, school and birth record linkage forms. CDS interviewing will be conducted by a mix of SSL and Field interviewers. Coverscreen and PCG interviews will be handled by SurveyTrak and Blaise 4.8, Adolescent interviews will be handled by MSMS and Blaise 5.		
SRO Project Period	08/2022 - 01/2025		
Data Col Period	09/2023 - 01/2025		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 10/01/2022</div><div>Pretest End: 05/14/2023</div><div>Staffing Complete: 08/01/2023</div><div>SS Train Start: 09/07/2023</div><div>DC Start: 09/14/2023</div></div> <div><div>Pretest Start: 04/24/2023</div><div>Recruitment Start: 07/01/2023</div><div>GIT Start: 09/05/2023</div><div>SS Train End: 09/12/2023</div><div>DC End: 01/01/2025</div></div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	SurveyTrak; MSMS; Other (WSMS)		
Data Col Tool	Blaise 4.8; Blaise 5; Other (IVR)		
Hardware	Laptop; Desktop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Time Diary Coding)		
QC Recording Tool	DRI-CARI; Camtasia		
Incentive	Yes, R; Yes, INF; Yes, Other (PCG)		
Administration	SRO Group		
Payment Type	Check, post (75 + interventions); Other (ePay)		
Payment Method	Check through other system (PSID RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID RAPS)		

Report Period	Apr, 2023 (PSID CDS 2023)		Initiation
Risk Level	On Track		
Monthly Updates	<p>CDS 2023 has not yet received the 2023 - 2025 funding from NIHCD, however, Pls found \$178K to cover some of the cost accrued under the contingency account.</p> <p>Pls asked us to continue development and preparations for the pretest and we are on track with technical development for those dates.</p> <p>CDS 2023 Pretest started with sample recruitment in early May. We completed a brief 4 hour training on May 9th and thus far recruited 9 families to participate in the pretest. Pretest training is scheduled for June 13 - 16 following PSID Core Training 2.</p> <p>Pretest components will cover Phase 1 of the CDS 2023 data collection protocol including remote administration of phone coverscreen, and a primary care-giver interview followed by a web-phone interviews with adolescents 12-17.</p>		

Phase 1 will also include a transfer from CATI to IVR to ask sensitive questions. We are still finalizing the last part of the IVR contract - Enghouse needs to sign a data protection agreement to be authorized by U-M for human subject data collection.

In recent discussions, due to delay in securing funding, there is a growing consensus that Phase 1 of CDS should be re-scheduled from October - May 2024 to start later in January 2024. Preparations, and estimations are conducted to determine the implications of this change.

Phase 2 of CDS data collection will include home visits with Saliva, Woodcock-Johnson, Time Diaries, and younger child (8-11) interviews. Phase 2 is tentatively scheduled to start in Summer or Fall of 2024 through January 2025.

Current activities:

Blaise programming:

- B5 Child programmed and being tested
- B4.8 PCG programmed and being tested
- B4.8 CS programmed and being tested

SurveyTrak programming:

- Integration Pretest project is being tested
- ST + B5 project for younger children programmed and tested

MSMS Programming:

- INT 4 tested
- Copy procedure for Child lines from ST to MSMS has been implemented and is being refined

New IVR system: Enghouse / Survox sole source is awaiting the last part of the contract (DPA)

Special Issues

Budget: Contingency budget has been established through October '22 but as of February, we don't have a clear expectation for when the funding will be awarded. SRO is communicating regularly with the PI and the SRC Director's office to monitor the contingency account. Pls are able to cover \$178K.

Tech systems: CDS development is ceding programming time to allow some programmers to focus on PSID-Core launch. This led to some delays on the MSMS side of our development.

Cost as of	Total Cost to Date (direct + indirect):	0.00
	Est Cost at Completion (E\$AC):	0.00
	Total Budget:	0.20
	Variance (Total Budget minus- E\$AC):	0.00
	Reason for Variance:	CDS is under contingency funding awaiting funding decision from NIH. We spent \$342K direct through February.
Projections as of	Dollars Projected for Month:	0.00
	Actual Dollars Used:	0.00
	Variance (Projected minus Actual):	0.00
	Reason for Variance:	In February, we projected spending \$51K but spent \$47K.

Measures		Units at Complete	RR	HPI
	Current Goal:	tbd	tbd	tbd
	Goal at Completion:	tbd	tbd	tbd
	Current Actual:	tbd	tbd	tbd
	Estimate at Complete:	tbd	tbd	tbd
	Variance:	tbd	tbd	tbd

Other Measures

Project Name	(PSID23 Online Contact Update) Panel Study of Income Dynamics 2023 Online Contact Update		
Project Mode	Primary: Web Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 47,456.00	Indirect Budget: 0.00	Total Budget: 47,456.00
Principal	Katherine McGonagle (PSID)		
Investigator/Clients			
Funding Agency	NSF, NIA, NICHD, The Office of the Assistant Secretary for Planning and Evaluation of the United States, DHHS, The Economic Research Service of the United States Department of Agriculture, HUD, DOL, The Center on Philanthropy at the Indiana University-Purdue University		
IRB	HUM#: HUM00062417	Period of Approval: 3/22/22-3/21/23	
Project Team	Project Lead: Camila Kendall Budget Analyst: Ivanna Iavorska-Em Production Manager: Senior Project Advisor: Stephanie A Chardoul Production Manager 1: Production Manager 2:		
Proposal #	no data		
Description	SRO will write technical specifications, program and test a Blaise 5 web instrument and web portal with authentication that will allow PSID and TAS respondents to confirm or update their contact information via an online survey. SRO will provide PSID will authenticated QR codes that will be embedded in a mailing sent to respondents. SRO will also send the respondents one email reminder with an authenticated link. This project is under the PSID Core IRB.		
SRO Project Period	04/2022 - 12/2022		
Data Col Period	06/2022 - 12/2022		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: SS Train Start: DC Start: 07/01/2022 </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: 11/30/2022 </div> </div>		
Other Project Team Members	Rachel Orlowski -- PSID Core Lead Karl Dinkelmann -- TSG Lead and Blaise Programming Support Marsha Skoman -- Blaise Programmer Daric Thorne -- MSMS Spec Lead Kyle Goodman -- MSMS Set up Programmer Jim Rodgers -- MSMS Lead Rose Zybel -- Data Manager		
Other Project Name			
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Yes, R		
Administration	ISR Group (PSID)		
Payment Type	Check, post (\$10); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID staff will handle check & e-payment via RAPS)		
Report Period	Apr, 2023 (PSID23 Online Contact Update)		Closing
Risk Level	On Track		
Monthly Updates	Project ended on December 15. Project archiving began on May 11th.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		45,946.49
	Est Cost at Completion (E\$AC):		46,920.26

Total Budget:		47,456.00		
Variance (Total Budget minus- E\$AC):		535.74		
Reason for Variance:		Minimal change. No projections until project archiving in May.		
Projections as of	Dollars Projected for Month:	182.17		
	Actual Dollars Used:	205.11		
	Variance (Projected minus Actual):	-22.94		
	Reason for Variance:	Monthly overrun due to fringe rate fluctuation.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(PSID23) Panel Study of Income Dynamics Core 2023		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 6,235,802.00	Indirect Budget: 0.00	Total Budget: 6,235,802.00
Principal Investigator/Clients	Katherine McGonagle (UM-SRC-PSID)		
	Narayan Sastry (UM-SRC-PSID)		
	Esther Friedman (UM-SRC-PSID)		
Funding Agency			
IRB	HUM#: HUM00062417	Period of Approval: 3/22/22-3/21/24	
Project Team	Project Lead: Rachel Anne Orlowski		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Stacy Quisenberry		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1: Daric Thorne		
	Production Manager 2: Shonda R Kruger-Ndiaye		
Proposal #	no data		
Description	<p>The Panel Study of Income Dynamics (PSID--also known to Respondents as the Family Economics Study or FES) is a longitudinal survey of several thousand individuals and their families, carried out since 1968 and conducted every two years. The sample is comprised of respondents from the 4,800 original families as well as new (immigrant) sample added in 1997/1999 and 2017/2019. The total 2023 sample size will be approx. 11,200, with approx. 9,650 completed interviews expected. Most of the information collected is about family composition and changes (marriages, divorces, births, deaths, people moving in and out); income sources and amounts; employment and pensions; and wealth. There are also questions about housing; education; vehicles; health; fertility; COVID-19; and money spent on food, healthcare, and school. The main focus is on how these family composition and financial factors interact with each other and how they change over time. The survey will be administered via web and telephone, with the expectation that more surveys will be completed via web than telephone (which will be a first for the study).</p> <p>During the 2023 wave, saliva samples will be collected for the first time on PSID Core. The Core interview must be completed to be eligible for saliva collection. Saliva sample participants that are eligible for collection during Core are adults related to Child Development Supplement (CDS) children but do not live with them. Interviewers will be trained on both the interview and saliva collection protocols. Both data collection efforts will be managed in the same MSMS project.</p> <p>The 2023 waves of CDS and the Transition into Adulthood (TAS) will follow PSID Core data collection. CDS and TAS eligibility is dependent upon completion of PSID Core.</p>		
SRO Project Period	03/2022 - 05/2024		
Data Col Period	03/2023 - 02/2024		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: 03/01/2022 Pretest End: 10/31/2022 Staffing Complete: 04/21/2023 SS Train Start: 03/08/2023 DC Start: 03/23/2023 </div> <div> Pretest Start: 10/11/2022 Recruitment Start: 09/19/2022 GIT Start: 06/05/2023 SS Train End: 06/11/2023 DC End: 02/28/2024 </div> </div>		
Other Project Team Members	TSG Tech Leads - Jim Rodgers, Jeff Smith, & Karl Dinkelmann; Data Manager - Brad Goodwin; 68ID Site Programmer - Ashwin Dey; Blaise Programmer - Jude Perillo; MSMS Programmers - Pam Swanson; Self Scheduler Programmer - Peter Sparks; Help Desk Support - Andrea Pierce; Production Tech Support - Sarah Broumand; Testing Coordinator - Camila Kendall; Project/Production Support - Mark Nathin, Janet McBride, & Xiomara Lorenzo-Guerra; Reporting, Mapping, & Sample Assignment - Ji Qi & Wen Chang		
Other Project Name	PSID Core 2023		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Camtasia		
Incentive	Yes, R; Yes, Other (Locator, Proxy)		
Administration	ISR Group (PSID)		
Payment Type	Check, post (Varies); Cash, post (Varies); Other (electronic, post--JP Morgan)		
Payment Method	Check through other system (PSID will handle check & e-payment via RAPS); Interviewer payment of cash (reimbursed/reconciled via Tenrox) (PSID will handle check & e-payment via RAPS)		

Report Period	Apr, 2023 (PSID23)		Implementing	
Risk Level	Some Concerns			
Monthly Updates	<p>Summary of April 2023 Activities</p> <p>Tech: On April 5, we invited 1800 English Web Release 4 cases, and we began to experience Blaise Server crashes. CMT doubled the RAM and Cores as the Blaise server was extremely slow. Interviewers were experiencing DCA Blaise sync errors. We paused outbound activity as we investigated the issue. SRO met with CBS daily in order to troubleshoot the problem. Added an index table to the Blaise server on April 12, and the server crashes and sync errors stopped. Production activities resumed</p> <p>SRO and CMT began working on a six server solution to increase concurrent capacity. Current implementation is a two server environment.</p> <p>Spanish CATI and web programming continued. Efforts continued to streamline PQT for TL and management use. Report development continued. Continued work on Team Locating within the 68ID Site. Splitoff development began, with deployment delayed to June. Saliva system development resumed.</p> <p>Production: Only able to invite half of English Web Release 4 on April 5 due to Blaise server technical issues. The remainder of the release was invited at the end of April and beginning of May. Some of the Release 4 cases that were released but not yet invited were accidentally contacted via email and/or text before invitation messages were sent, so the management team promptly sent the invitation messages to these cases. The PIs were notified of the situation and confirmed the resulting actions.</p> <p>The sample release schedule was revised due to the Blaise server issues. Production activities were paused from April 10 – 14. Sample transfers to new interviewers began after the pause.</p> <p>Web Special Offer is a two-week intervention where outstanding web cases within a release are offering an additional \$20 to complete the interview during that period. We initiated this intervention for Release 1 on April 19 and for Release 2 on April 26.</p> <p>Evaluators were trained on April 13. Verification began on April 28. Verification faced some technical issues, including initially pulling in cases for saliva collection verification, but all issues were immediately identified and resolved quickly.</p> <p>Training: T1 continued April 3 - 6. Two interviewers did not certify. Preparations underway for Training 2 in early June.</p> <p>Staffing: New hire recruitment ended on April 21—hired 86 interviewers. Unable to hire in all geographic areas.</p>			
Special Issues	Unable to staff as many on-staff interviewer hours as budgeted -- many shared agreements. Experiencing higher than anticipated levels of on-staffer attrition. Need more new hires than anticipated, which has a sizable negative impact on the budget and proposes a risk to data collection.			
Cost as of May 22, 2023	Total Cost to Date (direct + indirect):		1,227,240.51	
	Est Cost at Completion (E\$AC):		6,514,156.90	
	Total Budget:		6,235,802.00	
	Variance (Total Budget minus- E\$AC):		-278,354.90	
	Reason for Variance:	CRS has the main iw and saliva budgets loaded. Still in the process of adjusting projections. This report reflects projections as of 5/22/23. Rates for staff working on the project are higher than budgeted rates. More new hires are needed than what was budgeted. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Projections as of May 22, 2023	Dollars Projected for Month:		288,374.67	
	Actual Dollars Used:		275,973.58	
	Variance (Projected minus Actual):		12,401.09	
	Reason for Variance:	Production managers, help desk, tech leadership, statisticians, training support, administrative assistants, recruitment staff, and interviewers charged less time than projected. Shipping, advertising/recruitment, and printing costs were less than projected. Note: Unable to separate Core IDC costs from Contact Update IDC costs. Cost values only reflect Direct Costs.		
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:	1287	21%	1.4
	Estimate at Complete:			
	Variance:			
Other Measures	Notes for Measures Above: From Dashboard through 4/29/23. Units = 1287 iws (132 CATI--10%, 1155 web--90%). Still need to develop a goal chart.			

BUDGET ASSUMPTIONS:

Mode of completion: 60% web & 40% CATI; Of the web completes, 38% do not require any interviewer effort.

HPI: 5.42 = CATI completes; 7.21 = web completes w/ interviewer follow-up; 10.17 = non-sample/non-iw. Additional 1.74 HPI for FTF NRFU cases.

Project Name	(QoL & Hearing Loss) Quality-of-Life for Amish Children with Hearing Loss		
Project Mode	Primary: Cognitive IW Total of Modes: 1		
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,200.00	Indirect Budget: 0.00	Total Budget: 8,200.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Margaret Lee Hudson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1: Lisa Van Havermaet		
	Production Manager 2:		
Proposal #	no data		
Description	Cognitive interviews to develop a QoL instrument for Amish children with hearing loss		
SRO Project Period	02/2022 - 12/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name	Amish study		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	Not used		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (QoL & Hearing Loss)		Implementing
Risk Level	On Track		
Monthly Updates	No work was done on the project in April. We will next be going to the field to conduct cognitive interviews as part of the June quarterly community clinic.		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		0.00
	Est Cost at Completion (E\$AC):		0.00
	Total Budget:		8,200.00
	Variance (Total Budget minus- E\$AC):		0.00
	Reason for Variance:		
Projections as of	Dollars Projected for Month:		0.00
	Actual Dollars Used:		0.00
	Variance (Projected minus Actual):		0.00
	Reason for Variance:		

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(SAME) Skills Assessments Mode Evaluation Study		
Project Mode	Primary: Telephone	Secondary: Face to Face	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 193,800.00	Indirect Budget: 108,527.00	Total Budget: 302,327.00
Principal	Paula Fomby (U Penn/UM/ISR/SRC)		
Investigator/Clients	Narayan Sastry (UM/ISR/SRC)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Hongyu Johnson		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager: Sarah Crane		
	Senior Project Advisor: Stephanie A Chardoul		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	<p>The WJ-RAP is the continuation study from the WJ-Pilot of 2021.</p> <p>The goal of this project is to complete Woodcock Johnson Tests of Cognitive Abilities both remotely and in person, during two separate interviews, from 80 families with an average of 1.5 children aged 5-17 per family. SRO will recruit a convenience sample of 90 families in order to obtain a completed remote and in-person interview from 80 families. For the remote administration interview, a tablet computer will be sent to respondents and used to electronically display the pages of the Woodcock Johnson assessment tool while an SRO interviewer communicates via a video link on a laptop. The Respondent will return the tablet in a postage paid mailer. For the in-person interview, an SRO interviewer will travel to meet respondents in person and conduct another version of the Woodcock Johnson assessment using Woodcock Johnson easels. This project will take place from January 2023 to September 2023.</p>		
SRO Project Period	02/2023 - 12/2023		
Data Col Period	06/2023 - 08/2023		
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Stephanie Chardoul - SRO SPA Sarah Crane - Survey Director (Project Consultant) and Production Manager Helen (Hongyu) Johnson - Lead Project Manager Mari Haft- SRO staff Youhong Liu - Blaise Programmer Kelly Lieske - Blaise Programmer Edward Green - Data Manager Laura Yoder - Data Operations Supervisor Jeff Smith - Data Operations Supervisor John Gawlas - HelpDesk staff David Bolt - HelpDesk Supervisor Russ Stark - DCO Staff Tyler Davis-Kean - DCO Assistant (temp)		
Other Project Name	Woodcock-Johnson Remote Administration Project		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; Tablet; [UM cell] Phone; Other (external monitor)		
DE Software	NA		
QC Recording Tool	Camtasia		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Check, post (\$100)		
Payment Method	Check through STrak RPay System		

Report Period	Apr, 2023 (SAME)		Implementing
Risk Level	Some Concerns		
Monthly Updates	Project Management:		

- Continue to provide updates to the SRO Admin team.
- Continue to closely monitor the costs and projections with the financial analyst.
- Continue to coordinate with the technical team staff to finalize the ST programming and testing.
- Submitted materials for the eResearch approval
- Work with production manager to prepare training activities
- Purchased equipment/hardware as needed

Technical System Development and Testing:

- Closely monitoring the ST integration testing progress
- Set up test, training, and production projects in ST
- Continue to actively test instrument

Interviewer Hiring

- Secured 5 interviewers.
- Continue to pursue additional interviewers as possible.

Training

- Training plan is in place.
- *Zoom tech training section is scheduled on 5/19/2023
- *Plan to train from May 22 through May 31 (4 hours per day excluding Memorial Day holiday weekend 05/26-5/29)
- Continue to work on training materials

Special Issues	we did not meet staffing goals (8 lwers & 1 TL), and are working on an alternate training plan to bring on add'l lwers. Also, the PI raised some concerns about recruiting enough convenience sample with the smaller lwer team, so we're exploring options to have SRO regular and contingent staff nominate families in the target areas.			
Cost as of Apr 30, 2023	Total Cost to Date (direct + indirect):	73,256.68		
	Est Cost at Completion (E\$AC):	322,709.92		
	Total Budget:	302,327.00		
	Variance (Total Budget minus- E\$AC):	-20,382.92		
	Reason for Variance:	The increased overall overrun is mainly due to increasing hours for SSI and higher hourly rate for interviewer III and the Interviewer II than we budgeted.		
Projections as of Apr 30, 2023	Dollars Projected for Month:	49,581.07		
	Actual Dollars Used:	37,213.40		
	Variance (Projected minus Actual):	12,367.67		
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(SCA 2023) Surveys of Consumer Attitudes		
Project Mode	Primary: Telephone	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 1,332,352.00	Indirect Budget: 0.00	Total Budget: 1,332,352.00
Principal	Joanne Hsu (SCA)		
Investigator/Clients	Tuba Suzer-Gurtekin (SCA)		
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Theresa Camelo		
	Budget Analyst: Dean E Stevens		
	Production Manager: Lisa J Carn		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	The monthly Surveys of Consumers are a series of nationally representative surveys with households in the contiguous United States. The SCA is designed to measure changes in consumer attitudes and expectations.		
	The objectives of the surveys are to learn what consumers think about economic events under varying circumstances and to determine why they think and behave as they do. Since changes in attitudes and expectations occur in advance of behavior, measures of consumer attitudes and expectations can act as leading indicators of aggregate economic activity. The survey measures are not intended to establish the absolute level of consumer sentiment at any given time. The SCA is intended to measure change. Each month the SSL interviewing staff obtains 600 interviews.		
SRO Project Period	01/2023 - 12/2023		
Data Col Period	12/2022 - 12/2023		
Security Plan	NA		
Milestones	<div>Pre Production Start:Pretest Start:Pretest End:Recruitment Start:Staffing Complete:GIT Start:SS Train Start:SS Train End:DC Start: 12/27/2022DC End: 12/20/2023</div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	NA		
QC Recording Tool	DRI-CXM		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Apr, 2023 (SCA 2023)		Initiation
Risk Level	On Track		
Monthly Updates	SCA APRIL 2023 began as scheduled on Wednesday, March 29th and ended as scheduled on Monday, April 24th. We completed 601 interviews for the month (321/180/100), 1 interview above the monthly goals of 600 (320/180/100). The HPI for April was 3.22; .22 above the 3.0 (but only .02 above the budgeted goal of 3.2). A class of new interviewers were trained at the end of the March study month contributing to the higher than usual HPI.		
Special Issues	With four months of data collection now completed, and a better sense of actual costs as compared to budgeted now available, a comprehensive review of the projected costs through the end of the CY was completed adjusting for several line items resulting in a significantly lower than previously projected underrun (the projected underrun is now \$26,751.16 down from \$76,526.01 last month).		
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):		406,821.29
	Est Cost at Completion (E\$AC):		1,305,600.84
	Total Budget:		1,332,352.00

Variance (Total Budget minus- E\$AC):		26,751.16		
Reason for Variance:		Lower than budgeted HPI.		
Projections as of May 15, 2023	Dollars Projected for Month:	122,721.98		
	Actual Dollars Used:	116,138.61		
	Variance (Projected minus Actual):	6,583.37		
	Reason for Variance:	Lower than budgeted Project Manager costs (due to vacation).		
Measures		Units at Complete	RR	HPI
	Current Goal:	600		3.0
	Goal at Completion:	600		3.0
	Current Actual:	601		3.22
	Estimate at Complete:	601		3.22
	Variance:	+1		+.22
Other Measures				

Project Name	(SRS 2021) Social Relations 2023		
Project Mode	Primary: Face to Face	Total of Modes: 1	
Project Type	Sponsored Projects		
Budget	Direct Budget: 3,767,057.11	Indirect Budget: 2,109,553.00	Total Budget: 5,876,610.11
Principal	Toni Antonucci (ISR)		
Investigator/Clients	Kristine Ajrouch (ISR)		
	Laura Zahodne (ISR)		
Funding Agency	NIH		
IRB	HUM#:		Period of Approval:
Project Team	Project Lead: Barbara Lohr Ward		
	Budget Analyst: Christine Evanchek		
	Production Manager: Veronica Connors-Burge		
	Senior Project Advisor: Nicole G Kirgis		
	Production Manager 1: Taghreid Lovell		
	Production Manager 2: Ian Ogden		
Proposal #	no data		
Description	Conduct 3400 interviews with respondents aged 35 years or older residing in the tri-county area of Southeast Michigan (Wayne, Oakland and Macomb counties) and 244 interviews with original Social Relations panel sample members aged younger than 65 years of age. The project involves screening up to 6900 new sample lines., with one selected respondent per household. The interview will consist of a 60 minute core interview (content from the Social Relations interview), a 60 minute cognitive interview and a series of physical measurements (height, weight, blood pressure, grip strength) and saliva collection. The SRS 2023 project will use the same instrument programmed for the D-Amp project, with the only new programming being that for a screener. The screener will be translated into Arabic. No informant or proxy interview is included in the project scope. Interviews will be conducted in English or Arabic.		
SRO Project Period	09/2021 - 05/2023		
Data Col Period	05/2023 - 04/2024		
Security Plan	NA		
Milestones	<div><div>Pre Production Start: 09/01/2022</div><div>Pretest End:</div><div>Staffing Complete: 04/10/2023</div><div>SS Train Start: 05/18/2023</div><div>DC Start: 05/30/2023</div></div> <div><div>Pretest Start:</div><div>Recruitment Start: 02/01/2023</div><div>GIT Start: 05/16/2023</div><div>SS Train End: 05/25/2023</div><div>DC End: 04/30/2023</div></div>		
Other Project Team Members	Taghreid Lovell, Veronica Connors-Burge, Mathew Luna, Jeff Smith, Ashwin Dey, Kelly Liesko, Peter Sparks, Raphael Nishimura, John Gawlas, Valyn Dall		
Other Project Name	Social Relations 2022, DAWN, Social Relations 2023		
Sample Mgmt System	SurveyTrak		
Data Col Tool	Blaise 4.8		
Hardware	Laptop; [UM cell] Phone; Paper and Pencil		
DE Software	Other (Weblog)		
QC Recording Tool	DRI-CARI		
Incentive	Yes, R		
Administration	SRO Group		
Payment Type	Cash, prepaid (\$75 respondent, \$25 informant); Other (\$2 screener incentive)		
Payment Method	Interviewer payment of cash (reimbursed/reconciled via Tenrox)		

Report Period	Apr, 2023 (SRS 2021)	Implementing
Risk Level	Attention!	
Monthly Updates	<p>During April 2023, SRC activities on the DAWN projects included the following:</p> <p>Task 1: Management, Budget and Work Plan</p> <ul style="list-style-type: none"> • Held meetings with the DAWN research team to discuss study planning, budget, scope and schedule for D-Amp and SRS. • Financial <ul style="list-style-type: none"> o Prepared cost reports and reviewed monthly expenses. o Finalized projections and entered them into the cost reporting system • IRB – prepared updated questionnaires and “track changes” documents for IRB. • Procurement <ul style="list-style-type: none"> o Continued procurement for study supplies for both D-Amp and SRS. Supplies were purchased interviewer duffle bags, prenotification mailings. • Technical systems & Questionnaires 	

- o Continued work to update/finalize specifications for the main interview, physical measures and cognitive sections.
- o Conducted repeated rounds of testing on all instruments and on the sample management systems
- o Updated and formatted Respondent Booklets for Main & Informant
- o Continued updates to the Arabic informant questionnaire, QxQs and respondent booklet.
- o Conducted rounds of testing on the screener application. Conducted automated testing on the screener application.
- Training preparation
- o Reviewed and revised study-specific training agenda.
- o Began drafting chapters for the project manual.
- o Began preparing powerpoint presentations
- Production preparation
- o Began printing materials and items needed for production
- o Began counting items for interviewer supplies
- o Worked with kitting vendor to finalize materials for kitting

Task 2: Sampling

- Began planning for DAWN sample monitoring dashboard.
- Ordered sample from MSG
- Began preparation of sample for production
- Provided programming group with updated specifications for testing
- Provided input for field progress reports

Task 3: Questionnaire Development

- See Task 1 for activities completed by the management team
- Conducted repeated rounds of testing on all instruments
- Began work to prepare Arabic specifications for updates
- Updated Arabic QxQs for the Interview Informant questionnaire

Task 4: CAI Programming

- Continued bug fixing on the screener instrument (English & Arabic)
- Updated QDRS programming on the Informant Interview, fixed bugs and issues
- Updated programming in all sections of the Main interview, conducted repeated rounds testing and bug fixes

Task 5: Systems Programming

- Continued programming updates to the SurveyTrak screener project to allow it to create sample lines for both D-Amp and SRS.
- Continued programming changes to SurveyTrak Main D-Amp project.
- Conducted continued rounds of testing/bug fixes to all sample management instruments

Tasks 6, 7: Interviewer Recruitment & Hiring, Training

- Facilities
- o Received bids for July training sites, reviewed and presented bids
- o Accepted bid from the Westin Southfield for July training
- Interviewer recruitment
- o Evaluated applications, conducted 1st, 2nd interviews for interviewer positions; conducted bilingual certification interviews
- o Attended hiring fairs, posted flyers and updated advertisements
- o Made offers to selected candidates, processed hiring paperwork and requested background checks. 28 total interviewers processed and hired for Training 1.
- o Began planning and preparations for recruitment & hiring efforts for Training 2 (July).
- Training
- o Met weekly to finalize plans for interviewer and team leader training
- o Prepared and shipped home study materials for team leaders
- o Prepared training materials for interviewers

Task 8: Main Data Collection

- Developed logistics and staffing plans for printing study materials, packing duffle bags and interviewer bulk supplies
- Coordinated with ISR Business Office to ensure supply of \$2 bills for prenotification letters

Task 9: Post Collection Processing

- No activity this month

Task 10: Weighting

- No activity this month

Task 11: Final Data Deliverables

- No activity this month

Special Issues

Areas Needing Special Attention Schedule

- DMSS requested a change to the programming of the screening instrument on May 12. This will require revamping the screener programming and significant testing -- an added, unanticipated expense to the project. About 100 sample lines are being held back from production launch until this change can be made.
- The project is experiencing significant attrition before & at the first training. 28 interviewers were hired, at present (May 21), 17 remain in training.
- Preparation of all instruments is running severely behind schedule. The project will launch without full functionality in production monitoring programs. This is because of both a lack of capacity to prepare specifications and a lack of capacity in programming resources.
- Interviewer attrition before and at training is high. 28 interviewers were recruited. We are down to 17 interviewers going into certification at the first training.

• Financial:

o SRO is carefully monitoring programming progress and cost. Some line items currently have slack that will be able to absorb modest overruns on other line items.

? Blaise programming will be over budget due to the complexity of launching the electronic consent forms, addition of the consent process programming, and changes to the questionnaire which involved re-working a majority of the skip patterns and respondent booklet references.

? SurveyTrak programming will be over budget due to the unexpected complexity of the screener project programming, which generates sample lines for two studies. It was also more difficult that expected to resurrect programming from 2019/2020 and update to the most current version of SurveyTrak.

• Schedule

o Programming is running behind schedule due to issues noted above.

? Priority is being given to launching the screener (English & Arabic), and the main survey, physical measures and cognition sections in English, as well as the informant questionnaire in English. These items are necessary for training.

? The Arabic version of the main questionnaire, informant interview and the proxy questionnaire (English & Arabic) will not be ready for the May 30 study launch. We will advise as soon as feasible on a possible launch date.

Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	305,325.93
	Est Cost at Completion (E\$AC):	5,874,955.74
	Total Budget:	5,876,610.11
	Variance (Total Budget minus- E\$AC):	1,654.37
	Reason for Variance:	The variance is insignificant.
Projections as of May 15, 2023	Dollars Projected for Month:	196,117.11
	Actual Dollars Used:	142,244.34
	Variance (Projected minus Actual):	53,872.77
	Reason for Variance:	Kitting and printing are running behind budget due to late delivery of IRB-approved documents from the research team. We expect kitting costs to hit in June. Printing for training and production did not occur until May. Late delivery of documents also impacted staffing - many preparation tasks were pushed into May. Other staff charged fewer hours than expected during April due to capacity issues.

Measures		Units at Complete	RR	HPI
	Current Goal:	3644	varies	10.5
	Goal at Completion:	3644	varies	10.5
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures	80% screener cooperation rate on new sample, 65% panel sample response rate 8.5 budgeted hpi without screening for new sample and panel sample; new sample HPI budgeted at 10.5 with screening
-----------------------	---

Project Name	(STARRS-LS Waves 3 & 4) Study to Assess Risk and Resilience in Servicemembers-Longitudinal Study		
Project Mode	Primary: Web	Secondary: Telephone	Total of Modes: 2
Project Type	Sponsored Projects		
Budget	Direct Budget: 8,196,521.00	Indirect Budget: 4,590,892.00	Total Budget: 12,809,390.00
Principal Investigator/Clients	James Wagner (University of Michigan) Robert Ursano (Uniformed Services University of the Health Science) Murray Stein / Ron Kessler (University of California San Diego / Harvard)		
Funding Agency	Department of Defense		
IRB	HUM#: HUM00180765	Period of Approval: 4/21/22 - 4/20/23	
Project Team	Project Lead: Meredith A House Budget Analyst: William Lokers Production Manager: Ruth B Philippou Senior Project Advisor: Lisa S Holland Production Manager 1: Jeffrey Albrecht Jr Production Manager 2: Lisa M Lewandowski-Romps		
Proposal #	no data		
Description	<p>This project is a continuation of the Army STARRS study (Army Study to Assess Risk and Resilience in Servicemembers). Army STARRS is a multi-component epidemiological and neurological study designed to generate actionable evidence-based recommendations to reduce US Army suicides and increase basic knowledge about the determinants of suicidality. The goals of STARRS Longitudinal Study (STARRS-LS) are to enhance DoD/Army actionable findings, maintain productivity of the Army STARRS data and systems established, and enable science-based answers to questions related to health, resilience, and manpower management for the Army of 2025.</p> <p>For STARRS-LS, we have attempted to reinterview respondents from the All Army Study (AAS), New Soldier Study (NSS), and Pre-Post Deployment Study (PPDS) samples using a web-phone multimode study. We started with a group of approximately 73,000 eligible persons who had been interviewed in one of those three surveys and gave consent to link administrative data to their survey data.</p> <p>To date, we have completed 2 waves of STARRS-LS interviewing. During Wave 1, we attempted to contact 50,000 individuals and completed approximately 14,500 full interviews. All Wave 1 participants that completed a full Wave 1 interview were asked to participate in Wave 2. Waves 3 and 4, which are covered in this application, will include the full STARRS-LS Wave 2 sample, regardless of whether they completed the interview.</p> <p>In addition to reinterviewing the AAS, NSS and PPDS samples; STARRS-LS will continue to maintain and support the Army STARRS Research Data Enclave, allowing members of the research team and collaborators to analyze primary Army STARRS data as well as coded historical administrative data received from the Army and DoD. Additionally, STARRS-LS will continue to receive administrative data updates and link coded administrative data to survey data (from the original Army STARRS data collection as well as STARRS-LS surveys).</p>		
SRO Project Period	05/2020 - 04/2025		
Data Col Period	11/2022 - 04/2024		
Security Plan	Yes		
Milestones	<div> <div> Pre Production Start: 04/01/2022 Pretest End: Staffing Complete: 10/01/2022 SS Train Start: 11/14/2022 DC Start: 11/07/2022 </div> <div> Pretest Start: Recruitment Start: 07/23/2022 GIT Start: SS Train End: 11/17/2022 DC End: 04/15/2024 </div> </div>		
Other Project Team Members	Ryan Yoder, Keith Liebetreu, Becky Loomis, Steven Sonoras, Andrew Piskorowski, Rose Zdybel, Ji Qi, Paul Burton, Makenna Harrison, Lamont Manley, Lisa Van Havermaet, Stephanie Windisch, Youhong Liu, Peter Sparks. Pam Swanson, Jim Rodgers, Marcus Blough, Nick Hinkle-DeGroot, Pete Westhead		
Other Project Name	STARRS-LS Continuation		
Sample Mgmt System	MSMS		
Data Col Tool	Blaise 5		
Hardware	Laptop; Desktop; [UM cell] Phone		
DE Software	N/A		
QC Recording Tool	Other (Blaise CARI)		
Incentive	Yes, R		

Administration	SRO Group	
Payment Type	Check, post (\$50-\$100)	
Payment Method	Check through other system (MSMS)	
<hr/>		
Report Period	Apr, 2023 (STARRS-LS Waves 3 & 4)	Implementing
Risk Level	On Track	
Monthly Updates	<p>Project Management and Planning:</p> <ul style="list-style-type: none">? We sent weekly production updates to the PIs, and reported on progress on the call with the Army/M&RA.? Meredith created the agenda/notes and facilitated the weekly meeting with the STARRS project managers.? We carried out bi-weekly meetings with M&RA to coordinate Safety Plan and respondent locating activities.? We sent a memo to the PIs requesting approval for a proposed experiment to test the effects of providing a heads-up message early on in the survey that informs respondents that they will be able to provide open-responses at the end of the survey in the soon-to-be-added "other experiences" open-ended item.? HJF sent the no cost extension for the Year 3 award to U-M ORSP. U-M had requested for it to be extended through July 2023 to give us the flexibility to fully spend year 3 and start next year more seamlessly. U-M ORSP processed and approved the extension.? We awaited word about the Year 4 sub-award (to be combined with the ~\$80k biosample flags budget). Via Josh, we asked if HJF (Shiloh Davis) could provide a statement with the Year 4 sub-award that it does not identify Controlled Unclassified Information (CUI) and that CUI will not be passed between HJF and U-M. Last year, language about required CUI handling was included in the sub-award language and it significantly delayed award processing until a clarification statement about the CUI could be provided. <p>? IRB:</p> <ul style="list-style-type: none">o The USUHS IRB provided concurrence for the continuing review for the STARRS-LS Waves 3 and 4 protocol on May 1.o IRB amendments for the biosample flag/administrative data/inventory document public release were submitted to the U-M IRB on April 28.? STARRS-affiliated, but not STARRS funded, work:o VA/HEARTH project:? Harvard (Ron, Nancy), U-M (Margaret, Meredith) and Katherine Koh, the psychiatrist who is training and supervising the qualitative interviewers, held a kick-off meeting on April 10.? The U-M Enclave Data/Security team determined that de-identified, PII-redacted qualitative IW transcripts can be moved off the Enclave to a secure Harvard server for review by project stakeholders.? We awaited the sub-award from Harvard. <p>Enclave and User Support:</p> <ul style="list-style-type: none">? 2022 Annual Security Controls Review: We received the U-M IA security audit approval letter, dated April 12, 2023, from AAG on April 18. This is now complete.? We completed our review of possible NDI non-deaths and found 12 records will need to be removed from NDI deliverables on the Enclave (6 from 2020, 3 from 2021, 3 from 2022). One of the 12 cases was coded deceased in Wave 3. We rectified this case's Wave 3 status (in outcomes dataset, flowcharts, documentation) and will include it as part of the Wave 4 sample. We also continued work on other necessary corrections and changes to our processing code so that similar cases will be individually reviewed in the future.? 2023 repeat NDI search: Dr. Ursano's account was reinstated and Aaron spoke with Velida Juzbasic (CDC NDI Office) who agreed to grant Aaron and Meredith permission to use Dr. Ursano's account to complete the NDI application. Meredith logged in, confirmed all of the application information was still as it had been left, and made the final changes. Velida told Aaron to call her to work with her on the agreements from the PIs because she needs to "separate them out" and process them a certain way. Dr. Ursano, Aaron and Meredith will be meeting with Velida on May 11 to review the application, uploaded agreements, IRB approvals, etc.? Standard Enclave activities continued. These include maintaining security requirements; processing background checks and Great Lakes Cluster user access requests, drop box requests, ID swap and data transfer requests; managing software acquisition and updates; and providing user support as needed. Of particular note this month:o We received a request to transfer SHOS-A qualitative data from Harvard to the Enclave where it can be analyzed with SHOS-A quantitative data. The Enclave team worked with the analysts at Harvard and USUHS to gain information about data to be transferred, then took steps to establish a secure file transfer mechanism.o Some work was completed on the additional requests related to the blood sample counts [by survey data collection (i.e. AAS, NSS, PPDS, SHOS-A, LS1, LS2) for the Army STARRS participants, the STARRS-LS cohort and respondents with data at ICPSR] for Dr. Ursano.? Biomarker group request for assistance in April:o We completed a transfer of PRS data from GLC to the Enclave. <p>Wave 3 Data Deliverable</p> <ul style="list-style-type: none">? LSW3 paradata and consent deliverables were loaded to the Enclave on April 10.? Metadata for the LSW3 survey tables was loaded to the enclave on April 13. The associated codebook was also made available on the Enclave and in Google Shared Drive.? Work continued on producing the User Guide and Crosswalk for public use deliverables.? Work began on the LSW3 weights deliverable to the Enclave. <p>Public Use Data:</p> <ul style="list-style-type: none">? The ICPSR quarterly report was sent to USUHS for M&RA/GSC on April 10.? Biosample flags, administrative variables, and inventory document:o USUHS CMPH (former CHIRP group) transferred the WGS ID file via DoD SAFE to U-M on April 7. U-M started work to add the WGS flags to the other biosample flag data on the Enclave.o IRB amendments describing the biosample flags, administrative variables, and inventory document were submitted on the NSS and PPDS protocols; an amendment for only the administrative variables was submitted on the AAS protocol.o We awaited funding for this work (~\$80k budget will be combined with the Year 4 funds).? We awaited decisions from the Army/GSC on producing the genetic and bioassay files for public use and placing data in the NIH National Data Archive and Public use release for GWAS. <p>Wave 4 Production Updates:Our areas of risk and mitigation strategies continue to be the same as reflected in previous months.</p>	

? Wave 4 production statistics, as of May 3, 2023, are as follows:

- o Replicates released: 6 of 14 released with 6,246 sample lines.
- o Completed interviews: 3,603 (3,391 web; 212 phone).
- o Replicate 4 ended production on May 1 with a final response rate of 75.1%. Although this is 1.2 percentage points lower than Replicate 3, it is 1.5 percentage points higher than Replicate 2 and 5 pp higher than Replicate 1. This raised the overall response rate for completed replicates to 74.2% (from 73.9%).
- o Replicate 5 completed Phase 2 and transitioned to Phase 3 on April 19. The response rate is currently 56.4% and trending slightly above (~2 pp) the trajectories of the Replicate 3 and 4 response rates.
- o Replicate 6 was released on May 1. So far, there are no completed surveys.
- o The response rate for completed replicates (Reps 1-4) is 74.2%.

Safety Plan Results:

? The Wave 4 Safety Plan rate is 11.5% as of May 3.

Special Issues

Descriptions of the areas of risk below were updated in the April monthly report to the PIs:

? Throughout Wave 3, we received more anecdotal reports of respondents saying the token of appreciation isn't enough to make participation in the survey worth their while. Some are individuals who received \$100 last time, and are still in phases offering \$50. For others, the dollars are not enough for the time involved. We are mindful that Wave 4 response rates may be negatively affected by respondents' experience with the longer Wave 3 survey. The first two replicates in Wave 4 produced lower response rates. Replicates 3 and 4 yielded higher response rates than Replicates 1 and 2, and Replicate 5 has followed the Replicate 3 and 4 trajectories to date. We will continue to monitor response rates closely, but at this time, we think we can remove implementation of a Wave 4 incentive experiment from active consideration. If there are further waves of data collection, we will want to strongly consider whether an incentive increase is merited.

? To date, our projected costs for Waves 3 and 4 have been higher than anticipated. Early contributions to increased cost estimates included a longer W3 survey instrument time for CATI and associated costs for recruiting and interviewing respondents, increased hours for programming W3 instrument changes, and an increase in SRO interviewer base pay rates due to higher than expected inflation. The projected overrun has decreased over the months due to staff resource shortages, lower than projected interviewer hours, and reduced telephone charges due to a return to the physical telephone facility. This month (April 2023), we carried out adjustments to the projections for production-related hours and non-salary costs using Wave 4 production data to date (e.g., W4 CATI interview length, response rates by phase, portion of interviews conducted by phone, etc.) While some of the production costs were reduced, about an equal number of costs were added in other areas, for example for interviewer and team leader training. We are experiencing higher than normal levels of attrition among our interviewing staff (this is not unique to STARRS-LS); therefore, we need to hire and train more frequently. In general, we continue to monitor the situation closely.

Cost as of Mar 31, 2023	Total Cost to Date (direct + indirect):	7,422,792.23
	Est Cost at Completion (E\$AC):	12,854,807.95
	Total Budget:	12,809,390.00
	Variance (Total Budget minus- E\$AC):	-45,417.95

Reason for Variance:

We spent a total of \$286,244 in March. Our projected deficit for the total five-year project is about the same at \$45,418 (compared to \$46,513 in January). We will continue to review project expenses and update our projections based on realized costs and our experiences to date.

After making extensive cost projections updates in April, including reworking all production-related hours and non-salary costs using Wave 4 production data (for response rates, specifically, Rep 3 numbers by phase were used as these were higher than Reps 1 and 2), we were at a projected underrun of about \$12K. STARRS leadership discussed and decided to add some cushion for the unknown of year 5 to bring us back to what we have been projecting - ~\$45K overrun. Bill added an additional month of IWER hours and made a few other increases. Final March cost report shows a projected overrun of \$45,418.

Projections as of Mar 31, 2023	Dollars Projected for Month:	312,467.88
	Actual Dollars Used:	286,243.72
	Variance (Projected minus Actual):	26,224.16

Reason for Variance:

We underspent in a few task areas in March, primarily in Main Data Collection - fewer interviewer hours were charged than projected (also around \$2K direct less in RPay than projected). The SSS and SD hours also came in under what was projected.

Measures		Units at Complete	RR	HPI
	Current Goal:	10,800	75	10.2
	Goal at Completion:	10,800	75	10.2
	Current Actual:	3,603	74.2 (Reps 1-4)	11.6
	Estimate at Complete:	10,800	75	11
	Variance:			

Other Measures

Developmental/Initiative Projects Dashboard

NonArchived Development Initiative and No-DataCol Projects

Project	Type	Phase	Project Lead	Jan	Feb	Mar	Apr
<i>TSME 23-Web Portal Documentation/Updates (423463)</i>	Initiatives	Implementing	Karl A Dinkelmann				
<i>TSME SRO SYS MAINTENANCE-GENERAL(483910)</i>	Initiatives	Implementing	Jeffrey L Smith				
<i>TSME23 DCO Tech System Support FY2023</i>	Initiatives	Initiation	Vivienne Y Outlaw				
<i>TSME23 SRO Web Admin Migration (483257)</i>	Initiatives	Initiation	Hueichun Peng				
<i>TSME23-PIPPA</i>	Initiatives	Implementing	Mark Simonson				
<i>TSME23-QC-Systems (483249)</i>	Initiatives	Implementing	Sarah Elisa Broumand				
<i>TSME23-SelfSchedUI (483424)</i>	Initiatives	Implementing	Andrew L Hupp				

Project Name	(TSME 23-Web Portal Documentation/Updates (423463)) TSME 23-Web Portal Documentation/Updates (423463)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Karl A Dinkelman		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project's necessity came from a need for an easily maintainable and easily usable Blaise login portal for our web surveys. Each project has unique needs, but many of the portal's functions are similar and shared across all projects. This initiative aims to create a generic template that is easy to alter for project-specific needs; while creating a web portal that is easy to use and maintain so that any developer can apply with minimal effort; additionally, the updated Blaise portal includes standardized logging and documentation.		
SRO Project Period	01/2023 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Shane Empie, Jude Perillo, and Peter Sparks		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Apr, 2023 (TSME 23-Web Portal Documentation/Updates (423463))	Implementing
Risk Level	On Track	

Monthly Updates

One of the main goals of this project was to incorporate event logging into the portal code, according to the following spec found here: <https://docs.google.com/document/d/18s9W-6nqFirQZe2r91NcObvG0vHqJvEhSuxZQ1OR88/edit#>

Nearly all of this logging is now included in the standard portal. Additional refactoring was done to break large, hard-to-follow chunks of code up into smaller, more readable, and usable functions, as well as refactoring was done to create functions to reduce repeated code. The code is significantly more approachable and debuggable. The project has also removed unused references and resources to minimize clutter and confusion. The most significant change is how different languages are managed. In the pre-existing portal, the code behind (.aspx.cs) file for the logon page was duplicated, so it had a Spanish version. This meant that any functional code changes in one had to be done in the other, which allowed for easy mistakes to happen. The process for languages is now changed to use ASP NET resource (.resx) files. There is a .resx file for each language. These files contain key/value pairs of all language text. For example, "Welcome!" and "¡Bienvenidos!" are accessible from the key "welcomeText", in respective English and Spanish resource files. When the code asks for "welcomeText," it will return and assign the appropriate part of the web page, depending on the active language. One can programmatically switch between languages, loading up the appropriate resource file each. This removes a significant amount of duplicate code. Additionally, because the language switching/text assignments happen via an asynchronous postback event, the time it takes for the switch is nearly immediate. This is a significant

improvement from the prior way of doing things; in the old world, the whole web page (and the server-side code behind it) had to be loaded up again when switching, which created a significant load time.

More detailed information about the portal updates that were made can be found here:
<https://docs.google.com/document/d/1ihXp1KQeYulgrXq5qd3Je9fGodnciRasLVblZbWkybU/edit>

Special Issues				
Cost as of May 16, 2023	Total Cost to Date (direct + indirect):			2,843.42
	Est Cost at Completion (E\$AC):			5,000.00
	Total Budget:			5,000.00
	Variance (Total Budget minus- E\$AC):			0.00
	Reason for Variance:			
Projections as of May 16, 2023	Dollars Projected for Month:			0.00
	Actual Dollars Used:			0.00
	Variance (Projected minus Actual):			0.00
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				

Project Name	(TSME SRO SYS MAINTENANCE-GENERAL(483910)) TSME SRO SYS MAINTENANCE-GENERAL(483910)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 20,000.00	Indirect Budget: 0.00	Total Budget: 20,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Jeffrey L Smith		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This project will be used to support all maintenance/enhancements needs for applications or systems directly to the SurveyTrak production database which would include Surveytrak, ST Administration, SRS RT, and RCLS to name a few.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Ashwin Dey Pam Swanson Marsha Skoman Holly Ackerman Darnell Christian		
Other Project Name	Sys Maint General		
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (TSME SRO SYS)		Implementing
Risk Level	On Track		
Monthly Updates	ST Admin - termination processing bug GIT - new Blaise instruments ST Build Team meeting ST Employee Data Merge - FRED data issue SSL Line Transfer utility bug fix 64 bit Line Generator GIT - new data models SCA Monthly Setup Help Dave Padot - MSMS Project Removal/Equipment Return Release new IW Data Merge & ST Admin New "pull GIT sample" feature in PRER Refresh ST App Error Log database Add SSL termination to ST Admin		

Special Issues				
Cost as of May 23, 2023	<i>Total Cost to Date (direct + indirect):</i>			35,638.40
	<i>Est Cost at Completion (E\$AC):</i>			38,975.42
	<i>Total Budget:</i>			20,000.00
	<i>Variance (Total Budget minus- E\$AC):</i>			-18,975.42
	<i>Reason for Variance:</i>			See monthly updates
Projections as of May 23, 2023	<i>Dollars Projected for Month:</i>			1,668.51
	<i>Actual Dollars Used:</i>			5,187.05
	<i>Variance (Projected minus Actual):</i>			-3,518.54
	<i>Reason for Variance:</i>			See monthly updates
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

Project Name	(TSME23 DCO Tech System Support FY2023) TSME23-DCO Tech System Support (483248) 2023		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 35,000.00	Indirect Budget: 0.00	Total Budget: 35,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Vivienne Y Outlaw		
	Budget Analyst: Carl S Remmert		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This includes all the support and development work for a suite of tech systems DCO uses, including Fred, Recruitment Website, Iwer Web Site, etc.		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div>Pre Production Start:</div> <div>Pretest End:</div> <div>Staffing Complete:</div> <div>SS Train Start:</div> <div>DC Start:</div> </div> <div> <div>Pretest Start:</div> <div>Recruitment Start:</div> <div>GIT Start:</div> <div>SS Train End:</div> <div>DC End:</div> </div>		
Other Project Team Members	Max Malhotra Shaowei Sun		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (TSME23 DCO Tech System		Initiation
Risk Level	Some Concerns		
Monthly Updates	1. (Fred Support) Developed a new function to allow for Role Change if the staff has an active Team Management assignment 2. (DB support) Batch Update Team Level for projects which already have team assignment records 3. (DB Support) Batch load inventory records. 3. (DCSR Support) Managed the project activation for Applicant Contact Update module 4. (DCSR Support) Corrected the email templates in DCSR		
Special Issues			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	58,759.46	
	Est Cost at Completion (E\$AC):	63,663.03	
	Total Budget:	35,000.00	
	Variance (Total Budget minus- E\$AC):	-28,663.03	
	Reason for Variance:	support needs greater than funding	
Projections as of May 15, 2023	Dollars Projected for Month:	1,701.62	

<i>Actual Dollars Used:</i>	7,843.31
<i>Variance (Projected minus Actual):</i>	-6,141.69

Reason for Variance: support needs greater than funding

Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			

Other Measures x

Project Name	(TSME23 SRO Web Admin Migration (483257)) TSME23 SRO Web Admin Server Migration (483257)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 5,000.00	Indirect Budget: 0.00	Total Budget: 5,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Hueichun Peng		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Gregg Peterson		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	SROWebAdmin server needs to retire by summer 2023, so we need to migrate all the applications on this server to other web servers.		
SRO Project Period	07/2022 - 09/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div><div>Pre Production Start:</div><div>Pretest End:</div><div>Staffing Complete:</div><div>SS Train Start:</div><div>DC Start:</div></div> <div><div>Pretest Start:</div><div>Recruitment Start:</div><div>GIT Start:</div><div>SS Train End:</div><div>DC End:</div></div>		
Other Project Team Members	Shaowei and Hueichun are the primary programmers to migrate the applications.		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (TSME23 SRO Web Admin Migration (483257))		Initiation
Risk Level	On Track		
Monthly Updates	Shaowei continues to work on the Recruitment Websites and has migrated and tested some at the new server. Programmers (Shaowei and Hueichun) will meet with DCO (Vivienne) to identify a time for official migration as we need to update all the DNS to the new folder. Hueichun is planning to move the CF applications to SROCFWeb.		
Special Issues			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	4,334.25	
	Est Cost at Completion (E\$AC):	9,262.98	
	Total Budget:	5,000.00	
	Variance (Total Budget minus- E\$AC):	-4,262.98	
	Reason for Variance:	work scope increase	
Projections as of May 15, 2023	Dollars Projected for Month:	2,537.81	
	Actual Dollars Used:	2,247.66	
	Variance (Projected minus Actual):	290.15	

Reason for Variance: work scope increase

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(TSME23-PIPPA) PIPPA 2.0 (425198) FY23		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,000.00	Indirect Budget: 0.00	Total Budget: 10,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Mark Simonson		
	Budget Analyst:		
	Production Manager:		
	Senior Project Advisor:		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	PIPPA application on the ODS Server		
SRO Project Period	01/1996 - 01/1996		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Sarah Broumand, Cheng Zhou, Andrew Piskorowski		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (TSME23-PIPPA)		Implementing
Risk Level	On Track		
Monthly Updates	<p>1. for the OVRL metrics, the week worked can be calculated by subtracting the Last Week Charged minus the First Week Charged. They don't want to keep increasing the number of weeks when the lwer leaves the project. DONE, Status: Task Completed</p> <p>2. The Ranking seems to be using the wrong column to sort on. The HPI_Rank is using HRS_WORK instead of HPI_Work DONE, Status: Task Completed</p> <p>3. IF two people have the same HPI_Work, then their ranking number should be the same. And the next Ranking number just has to be greater to the tied number. For example, if2 people have the same HPI_Work that is ranked at HPI_Rank =39, then the next can be 40 or 41. It does not matter. DONE, Status: Task Completed</p> <p>4. Contact Rate Ranking also does not look right. When I sort the CntRate_WORK, this is what I see . DONE, Status: Task Completed</p> <p>5. the ErRate_OVAL = Take the total number of Major error divided by the total number of questions evaluated. Since we have such large denominators, the numbers are super small, we would need to display 4 decimals. I changed the spec to multiply by 100 to fix that problem. Rename ErRate_OVAL to ErPct_OVAL DONE, Status: Task Completed</p>		
Special Issues			
Cost as of	Total Cost to Date (direct + indirect):		0.00

<i>Est Cost at Completion (E\$AC):</i>		0.00		
<i>Total Budget:</i>		10,000.00		
<i>Variance (Total Budget minus- E\$AC):</i>		0.00		
<i>Reason for Variance:</i>				
Projections as of	<i>Dollars Projected for Month:</i>	0.00		
	<i>Actual Dollars Used:</i>	0.00		
	<i>Variance (Projected minus Actual):</i>	0.00		
	<i>Reason for Variance:</i>			
Measures		Units at Complete	RR	HPI
	<i>Current Goal:</i>			
	<i>Goal at Completion:</i>			
	<i>Current Actual:</i>			
	<i>Estimate at Complete:</i>			
	<i>Variance:</i>			
Other Measures				

Project Name	(TSME23-QC-Systems (483249)) TSME23-QC-Systems (483249)		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 30,000.00	Indirect Budget: 0.00	Total Budget: 30,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Sarah Elisa Broumand		
	Budget Analyst: Carl S Remmert		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	Project used to maintain and further develop Current QC systems such as OLIVE		
SRO Project Period	07/2022 - 06/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members			
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	NA		
Hardware	NA		
DE Software	NA		
QC Recording Tool	NA		
Incentive	NA		
Administration	NA		
Payment Type	NA		
Payment Method	NA		

Report Period	Apr, 2023 (TSME23-QC-Systems (483249))	Implementing	
Risk Level	On Track		
Monthly Updates	Overall, OLIVE remains actively used and has remained stable for a few years now. The month of April was mostly used just to attend meetings and troubleshooting minor issues. NO major development in progress for the remainder of the fiscal year.		
Special Issues			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	26,606.80	
	Est Cost at Completion (E\$AC):	29,560.56	
	Total Budget:	30,000.00	
	Variance (Total Budget minus- E\$AC):	439.44	
	Reason for Variance:	Small variance.	
Projections as of May 15, 2023	Dollars Projected for Month:	1,476.88	
	Actual Dollars Used:	1,248.58	
	Variance (Projected minus Actual):	228.30	

Reason for Variance: Small variance.

Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			

Other Measures

Project Name	(TSME23-SelfSchedUI (483424)) Self-Scheduling Interface for MSMS		
Project Mode	Primary: Not Available		
Project Type	Developmental Initiatives		
Budget	Direct Budget: 10,000.00	Indirect Budget: 0.00	Total Budget: 10,000.00
Principal Investigator/Clients			
Funding Agency			
IRB	HUM#:	Period of Approval:	
Project Team	Project Lead: Andrew L Hupp		
	Budget Analyst: Ivanna Iavorska-Em		
	Production Manager:		
	Senior Project Advisor: Shonda R Kruger-Ndiaye		
	Production Manager 1:		
	Production Manager 2:		
Proposal #	no data		
Description	This technical initiative will continue the work of the respondent facing scheduling interface that wasn't able to be completed the prior fiscal year. In the prior fiscal the basic scheduling tool was created. The current remaining work centers around creating the manager side interface to be able to set parameters and the resulting data MSMS will need to provide the Blaise scheduler. Most of the development work is on the MSMS side to build and interface and the aggregation of data to pass to Blaise to use to determine which appointment slots can be shown on the screen. This budget is for the Blaise side of the work, not the MSMS portion.		
SRO Project Period	07/2022 - 04/2023		
Data Col Period			
Security Plan	NA		
Milestones	<div> <div> Pre Production Start: Pretest End: Staffing Complete: SS Train Start: DC Start: </div> <div> Pretest Start: Recruitment Start: GIT Start: SS Train End: DC End: </div> </div>		
Other Project Team Members	Andrew Piskorowski - writing stored procedure to summary all appointments Mark Simonson - possible manager interface for entering management parameters Peter Sparks - Blaise Developer (R facing page) James Rodgers - consultant as needed for MSMS Cheng Zhou - Manager parameter Ui and web API		
Other Project Name			
Sample Mgmt System	NA		
Data Col Tool	Blaise 5		
Hardware	NA		
DE Software	N/A		
QC Recording Tool	N/A		
Incentive	Not used		
Administration	N/A		
Payment Type	N/A		
Payment Method	N/A		

Report Period	Apr, 2023 (TSME23-SelfSchedUI 04/01/2023 - 04/30/2023)		Implementing
Risk Level	On Track		
Monthly Updates	The few remaining projections are to potentially add some additional ways to specify the open and close variables to accommodate the different hours the SSL is open (rather than a generic setting). That work would be done by Andrew P (modifying the stored procedure that takes that information into account), and Cheng to modify the PQT interface to be able to specify open/close times by day.		
Special Issues			
Cost as of May 15, 2023	Total Cost to Date (direct + indirect):	14,333.87	
	Est Cost at Completion (E\$AC):	14,333.87	
	Total Budget:	10,000.00	
	Variance (Total Budget minus- E\$AC):	-4,333.87	
	Reason for Variance:	Additional work on the API programming. I've spoken with Gregg about	

Projections as of May 15, 2023	Dollars Projected for Month:			707.20
	Actual Dollars Used:			380.69
	Variance (Projected minus Actual):			326.51
	Reason for Variance:			
Measures		Units at Complete	RR	HPI
	Current Goal:			
	Goal at Completion:			
	Current Actual:			
	Estimate at Complete:			
	Variance:			
Other Measures				