Creating a Respondent Self-Scheduling Interface Using Blaise 5

Andrew D. Piskorowski, Peter Sparks, Andrew L. Hupp

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S SELFIE

S SCHEDULER

CHALLENGES w/SCHEDULING INTERVIEWS

- **Trends in respondent behavior and expectations**
  - Increasing refusals
  - Better screening and spam

- **Interviewer availability and effort**
  - Hiring and retention
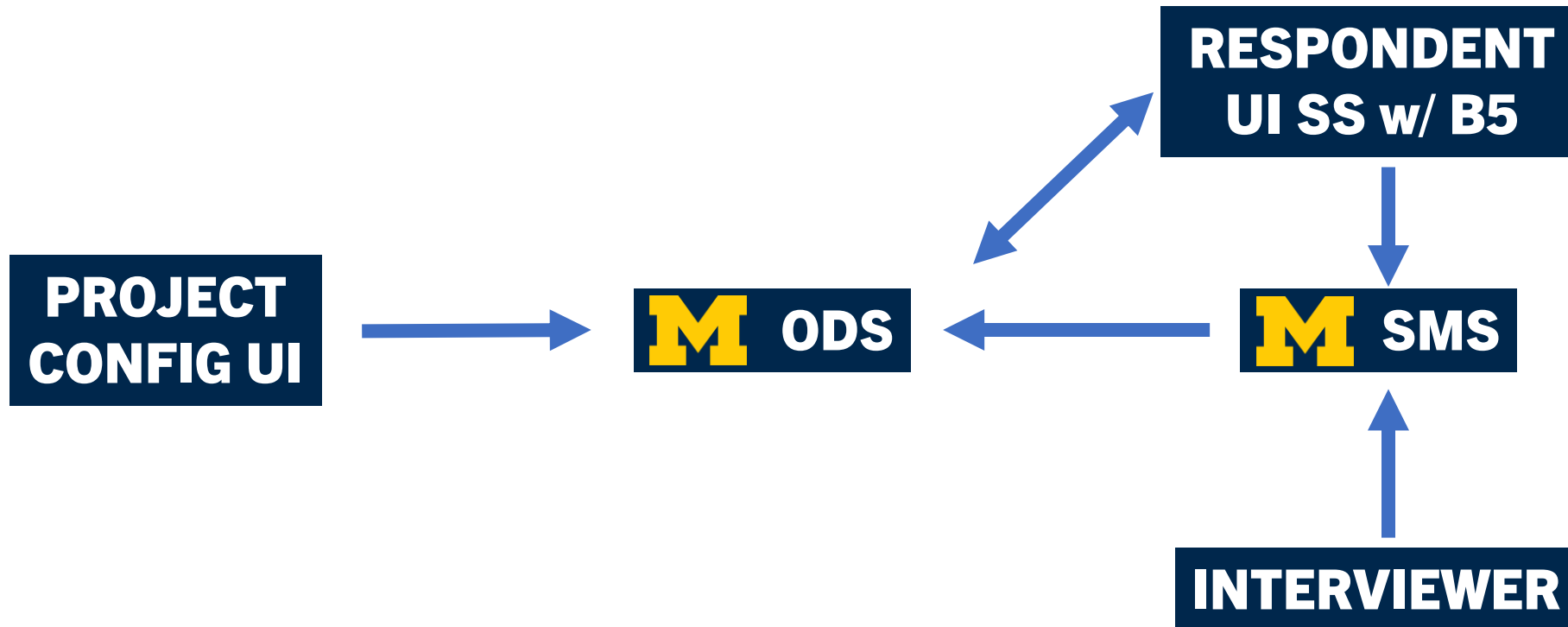 - Flexible scheduling
  - Best use of time

IN COMES RESPONDENT SCHEDULING

- **Brainstorm of what kind of parameters to control…**

  - **How long is the average interview?**

  - **What hours are interviewers available and how many do I have?**

  - **How far out can a respondent schedule an interview?**

  - **Can we make it intuitive?**

SYSTEM OF APPOINTMENTS

SELF SCHEDULING CONFIGURATION

PROJECT CONFIG UI *Settings per project that can change anytime based on needs*

- **Appointment Length**

- **Calling Hours**

- **Number of Interviewers**

- **Appointment Time Intervals**

- **Black Out Dates**

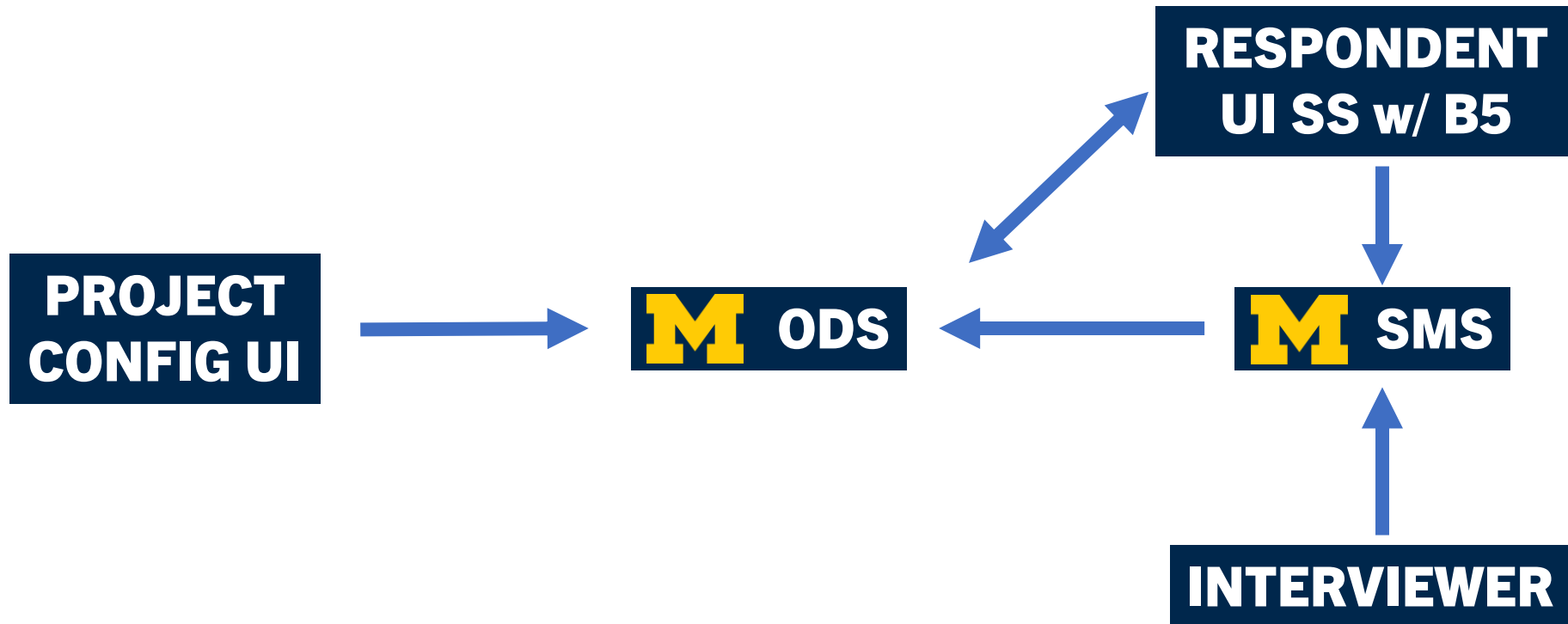- **Calling Window Frame**

SELF SCHEDULING CONFIGURATION

PROJECT CONFIG UI *Settings per project that can change anytime based on needs*

Setting	Value						
Appointment Length	90						
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Open Hours Start	07:00 AM	07:00 AM	07:00 AM	07:00 AM	07:00 AM	07:00 AM	07:00 AM
Open Hours End	11:00 PM	11:00 PM	11:00 PM	11:00 PM	11:00 PM	11:00 PM	11:00 PM
Max Iw Slots	4						
Black Out Dates (Multiple dates allowed, comma separated)	e.g. 1/1/2023,7/4/2023						
Schedule Delay Value	4						
Schedule Delay Time	days						
Schedule Window Value	2						
Schedule Window Time	months						
Appointment Interval	30						
Start Date	07/09/2023						
End Date	12/24/2023						

SYSTEM OF APPOINTMENTS

AVAILABLE APPOINTMENT SLOTS

ODS *SQL stored procedure to return available appointment slots*

PROJECT CONFIG UI

IW Length: *90 min*
Interviewers: *4*
Slot Interval: *30 min*
Schedule Delay: *4 days*

JustDate	JustTime	Slots
10/28/2023	7:00:00	4
10/28/2023	7:30:00	4
10/28/2023	8:00:00	4
10/28/2023	8:30:00	4
10/28/2023	9:00:00	4
10/28/2023	9:30:00	4
10/28/2023	10:00:00	4
10/28/2023	10:30:00	4
10/28/2023	11:00:00	2
10/28/2023	11:30:00	2
10/28/2023	12:00:00	0
10/28/2023	12:30:00	0
10/28/2023	13:00:00	0
10/28/2023	13:30:00	0
10/28/2023	14:00:00	4

SMS

Appt Time

2023-10-28 11:00
2023-10-28 11:00
2023-10-28 12:00
2023-10-28 12:00
2023-10-28 13:00
2023-10-28 13:00
2023-10-28 14:00
2023-10-28 15:00
2023-10-28 15:00

RESPONDENT INVITATIONS

Respondent invited by email and/or text message

FAMILIAR INTERFACE

https://[TestingSite]/[SS_Survey]/logon.aspx?l=[loginID]&p=[pin]5&iwerid=[iwerid]&S=[SessionContact]

SCHEDULING AN APPOINTMENT

1. Choose Your Interview Date and Time

Time Zone

| USA - Eastern | ▾ |

Date

| Select a date | ▾ |

Time:

Select *2. Enter Your Contact Information* to continue.

2. Enter Your Contact Information

3. Confirmation

SCHEDULING AN APPOINTMENT

1. Choose Your Interview Date and Time

Saturday, October 28, 2023 @ 07:00 AM USA - Eastern

2. Enter Your Contact Information

Contact Name

First name

Last name

Email

abc@xyz.tuv

Phone If you have an international number enter it in the note field.

(___) ___-____

Note Enter the phone number to call for your interview (if different than above) and any other notes you have for your interviewer.

Select *3. Confirmation* to continue
(Please wait while your interview is being scheduled.)

3. Confirmation

APPOINTMENT CONFIRMATION

1. Choose Your Interview Date and Time

Saturday, October 28, 2023 @ 07:00 AM USA - Eastern

2. Enter Your Contact Information

3. Confirmation

Confirmation - Thanks! Your interview is scheduled! We will send an email and a text message for your records shortly. Your appointment is scheduled for:

Saturday, October 28, 2023 @ 07:00 AM USA - Eastern

Exit

APPOINTMENT NOTIFICATIONS

Your appointment is confirmed for your University of Michigan interview: Friday, April 23, 2021 at 3:00 PM USA - Hawaii. Thank you!

Confirming Your U-M Interview Inbox x

UofM Survey <uofmsurvey@umich.edu>
to me

Jackie, your appointment is confirmed for your University of Michigan interview.

Date: Friday, Friday, April 23, 2021

Time: 3:00:00 PM USA - Hawaii

https://umstudytstcurc.isr.umich.edu/fes21ss/logon.aspx?L=PT68718&P=EUJR6G&S=JE

RESPONDENT
- SMS sends respondent confirmation email and/or text message
- Appointment details in both messages
- URL to reschedule in email
- Reminders and cancelled

INTERVIEWERS
- Notified of APPT status (scheduled, changed, cancelled)
- SYNC

CHANGING AN APPOINTMENT

You have a previously scheduled appointment for Monday, October 2, 2023 07:00 AM, USA - Eastern (USAET).

I want to:

Cancel

Reschedule

Your appointment for Monday, October 2, 2023 07:00 AM, USA - Eastern (USAET), has been canceled.

Exit

UNDER THE HOOD w/ALIEN PROCEDURES

- **procGetApptInfo**: Whether this is a prior appointment, along with date, time, time zone, and appointment ID of the appointment.
- **procSetNewAppt**: Set a new appointment with the management system using start date/time, end date/time, time zone, contact phone, session contact method, alternative contact phone, and appointment ID.
- **procRescheduleApt**: Reschedule an existing appointment with the management system using start date/time, end date/time, time zone, contact phone, session contact method, alternative contact phone, and appointment ID.
- **procCancelAppt**: Cancel an existing appointment using appointment ID and session contact method.
- **procRecordContact**: Write to the management system the type of appointment contact: canceled, scheduled, or rescheduled with parameters start date/time, end date/time, time zone, contact phone, session contact method, alternative contact phone, and appointment ID.
- **procGetContactInfo**: Get the first and last name, email, email type [confirmation/cancelation], phone, phone type [confirmation/cancelation]
- **procGetLanguage**: The initial current language to use for the appointment (English or Spanish)
- **procSetContactInfo**: Write out to the management system first and last name, email, email type [confirmation/cancelation], phone, phone type [confirmation/cancelation]

UNDER THE HOOD w/ALIEN PROCEDURES

- Session and Survey data is NOT saved since all appointment information is written back to the Sample Management System

- **Alien Procedure Example:**

```
RULES

procGetApptInfo(SampleID, xPriorApptData)

...

PROCEDURE procGetAppt

  PARAMETERS

      IMPORT piSampleID : STRING

      EXPORT poResult : STRING


      ALIEN('http://SROBLTSTCUR01C.ad.isr.umich.edu:8034/SelfSched',
      'ISelfSched', 'getAppt')

ENDPROCEDURE {procGetAppt}
```
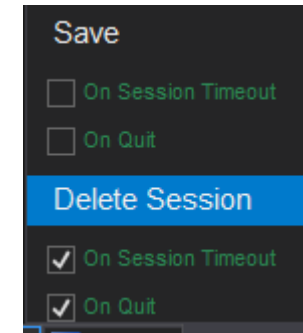
UNDER THE HOOD w/ALIEN PROCEDURES

- **JSON Example:**

```
{ "$type":"MSMS.SharedKernel.Models.AppointmentsDisplayList,
MSMS.SharedKernel",
    "appointmentId":"a25c8230-151e-4434-9af4-094e8d56821b",
    "sampleLineId": "187002",
    "scheduler": "someDood",
    "firstDateTime": "2021-04-23T17:30:00",
    "secondDateTime": "2021-04-23T17:30:00",
    "dateType": "On",
    "timeType": "StartingAt",
    "timeZone": "BHR",
    "contactMethodType": "Phone" }
```

WHAT'S NEXT?

- **Calendar Date Selection**

- **Add To Personal Calendar Option**

- **Time Zone Handling**

- **Soft Appointments and Multiple Appointments**

- **Demo**