Legacy Michigan CATI Sample Management System
– Mixed Mode CATI/Web

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Washington, D. C.
Overview

- SMS
- Blaise IS
- Mixed Mode
- Lessons Learned
- Conclusion
SMS

• History
• Implementation
• Iwer Process
• Hooks to Web - Mooks
• Controls the flow of data between systems
CATI Interviewer Process

- Workstation
- Login
- Project Selection
- Dial screen
- Cover sheet
- Pre-interview
- Interview
- Back to CS
- Post-interview
- Pre-cover sheet
- Coversheet
- Back to Dial
- Post-cover sheet

Legacy Michigan CATI Sample Management System – Mixed Mode CATI/Web

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CATI Interviewer Process

Workstation

- Login
- Project Selection

Dial screen

- Pre-interview
- Interview
- Back to CS
- Post-interview

Pre-coversheet

Coversheet

Post-coversheet

Legacy Michigan CATI Sample Management System – Mixed Mode CATI/Web

9/23/2013
New Tracking Info Available - 07/05/2013

Phone: 734/111-1111
Non-Working numbers: 734/222-2222

Current status: Active duty
Contact made: Yes

Pre-Interview
Installation: PBNC
Current Date: 7/17/2013
Current Time: 7:48AM

Release:
R Corytn. Time: 7:48AM
R Timezone: Eastern

Respondent Name and Address
Ryan Yoder
814 Memory Lane
Ann Arbor MI 48103

Call Record:
Number of Calls: 1
Last Call Result: 4201
Last Call Date: 06/13/2013
Last Call Time: 11:05am
Last Call Note: Spoke with R, R requested appointment at 1800 on 06/14/2013 appointment set

1. Start Interview
2. Appointment/Callback
3. Refusal
4. No Contact/Non-Interview/Non-Sample
5. Tracking
6. Hold for Supervisor
New Tracking Info Available - 07/05/2013

#: 734/111-1111
11: *** 734/222-2222
9: 734/333-3333

IN Track Phone1: 734/555-5555 03/11/2013
IN Track Phone2: 734/666-6666 06/12/2013

Pre-Post Interview: Study - 
Current status: Active duty
Contact made: Yes

Current Date: 7/17/2013
Current Time: 7:48AM
R Curr. Time: 7:48AM
R Timezone: Eastern

Respondent Name and Address
Ryan Yoder
814 Memory Lane
Ann Arbor MI 48103

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Number of Calls: 1
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1. Start Interview
2. Appointment/Callback
3. Refusal
4. No Contact/Non-Interview/Non-Sample
5. Tracking
6. Hold for Supervisor
7. Study Specific
8. Exit

CoverSheet1

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PreCS.man

• Check to see if case completed on web
• Pass in data useful for Coverscreen display
New Tracking Info Available - 07/05/2013

#: 734/111-1111
#: *** 734/222-2222
#: 734/333-3333

IN Track Phone1: 734/555-5555  03/11/2013
IN Track Phone2: 734/666-6666  06/12/2013

Pre-Post Interview: Study
Current status: Active duty
Contact made: Yes

Installation: FBNC
Release:

Respondent Name and Address
Ryan Yoder
814 Memory Lane
Ann Arbor MI 48103

Call Record:
Number of Calls: 1
Last Call Result: 4201
Last Call Date: 06/13/2013
Last Call Time: 11:05am
Last Call Note: Spoke with R, R requested appointment at 1800 on 06/14/2013 appointment set

1. Start Interview
2. Appointment/Callback
3. Refusal
4. No Contact/Non-Interview/Non-Sample
5. Tracking
6. Hold for Supervisor

CoverSheet1
PostCS.man

- Write essential data to SQL tables:
  - A status that requires some type of action
  - Result code status
  - Respondent Name and address updates
  - Contact person Name and address updates
New Tracking Info Available - 07/05/2013

#: 734/111-1111
1: *** 734/222-2222
9: 734/333-3333

IN Track Phone1: 734/555-5555 03/11/2013
IN Track Phone2: 734/666-6666 06/12/2013

Pre-Post Interview: Study -

Current status: Active duty  Contact made: Yes
TREATME
Installation: FMCN
Release:
Respondent Name and Address  Updated Respondent data
Ryan Yoder
814 Memory Lane
Ann Arbor MI 48103

Call Record:
Number of Calls: 1
Last Call Result: 4201
Last Call Date: 06/13/2013
Last Call Time: 11:05am
Last Call Note: Spoke with R; R requested appointment at 1800 on 06/14/2013 appointment set

1. Start Interview  7. Study Specific
2. Appointment/Callback  8. Exit
3. Refusal
4. No Contact/Non-Interview/Non-Sample
5. Tracking
6. Hold for Supervisor
PostIW.man

- Review completion status of interview
- Calculate time of interview
- Write to Coverscreen pertinent data collected in instrument
- Write data from instrument that can be used by a reporting system
Blaise IS

- Web respondent process
- Servers and databases
- Mixed mode
Web Respondent Process
Web Respondent Process
Web Respondent Process
Web Respondent Process
Web Respondent Process
Web Respondent Process

1. **Do you have regular access to a computer in your home?**
   - Yes
   - No

2. **Main Interview**
   - Main receipt page at completion
   - Data stored as preload to recontact interview

3. **Recontact Interview**
   - Recontact receipt page at completion
   - Contact person’s relationship to you:
     - First Name:
     - Last Name:
   - Is your second contact person’s address in the United States?
     - Yes
     - No

4. **Legacy Michigan CATI Sample Management System – Mixed Mode CATI/Web**
   - 9/23/2013
Servers and Databases
Servers and Databases

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**Diagram:**

- **SMS**
  - History
  - Coverscreen
  - Study
  - Routing table
  - Result codes
  - Tracking

- Other files: ADT, CARI, logs, trace files, ...

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Legacy Michigan CATI Sample Management System – Mixed Mode CATI/Web
Servers and Databases
Servers and Databases

For case management

Post-CS script
Nightly batch jobs
Data pulls

Pre-CS script
Post-IW script

Main receipt page
Recontact receipt page

Web management

SQL Database

Legacy Michigan CATI Sample Management System – Mixed Mode CATI/Web
Servers and Databases
Servers and Databases

Blaise IS (web/rules)
- Study (main BOI)
- Study (working BOI)
- Journal (paradata BOI)
- Recontact (main BOI)
- Recontact (working BOI)

Blaise IS (data)
- Study (new, or completes)
- Working (partials)
- Paradata (journal)
- Recontact (new, or completes)
- Recontact Working (partials)
Mixed Mode

- Blaise IS/Web Management
- Case Locking
Mixed Mode

• Interface & usability
Mixed Mode

• Testing
• Development environment
• Security
Mixed Mode

• Interviews
• Mode Switch
Lessons Learned

- One system controls management of sample
- BOI files accessing auto increment SQL tables
- Data flow and section management control very important
- Testing
- Enough time for specs, test, revise, ...
- Programmer's "alone time"
- Blaise IS data to web management system
Conclusion

• SMS: project-specific implementation isolated mixed mode from other studies.
• SMS: though legacy, still versatile
• Manipula/Maniplus extremely powerful
• Planning is key
• Coordinated effort between systems
• Data model migration requires careful attention to detail.
Contact Information

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