James A. Rodgers

TECHNICAL DESIGN AND IMPLEMENTATION
New Technical Requirements

The addition of web as an available mode brought with it several technical requirements that had not been a significant part of previous waves:

1. Issue login credentials to respondents.
2. Monitor respondent web activity and manage respondent access to the survey based on that activity.
3. Move cases to CATI non-response follow-up (NRFU) based on specific conditions.
4. Remove cases from NRFU immediately if the respondent completes the survey through the web.
5. Deliver cases to CATI interviewers based on specific rules that take recent activity into account.
Major System Functions

The Michigan Survey Management System (MSMS) is designed to manage mixed-mode protocols by coordinating the following functions:

- Execute specific data collection protocols.
- Interact with Blaise 4 and Blaise 5.
- Interact with email and text message service providers.
- Provide source data to SRC reporting systems.
- Manage sample contact information, such as addresses, phones, and emails.
Key Design Elements

MSMS is built around three key elements.

1. **Break work into tasks and structure the system around them.**
2. Use an automated task rules engine to manage manual and system tasks easily within a single project.
3. **Use web- and API-based, real-time communications between internal and external applications and services.**
Tasks

Tasks are the unit of work within the system. For HRS 2018, the single data model represented two tasks in MSMS: ConductWeb and ConductCATI. Each survey session (open and close of the instrument) in Blaise contains a value that indicates the mode in which the session was conducted, which allows that session to be mapped to one of the two tasks. Through this mechanism, MSMS records all Blaise activity against the appropriate task.