CATI: “Call me, maybe”

Pre-Conference Session, IBUC 2018

Overview

- Differences between B4 and B5 CATI
- Possible CATI scenarios
- Checklist for using CATI
- Using the dashboard
- Using Manipula
- Recent improvements
- Blaise 5.5 and future CATI plans
- Tips and tricks
Differences between B4 and B5 CATI

- Greater reusability
  - Every treatment can be (a parallel of) a survey
- Centralized daybatch
  - Prepared for multi-scheduler
- Multi-platform support
- Management dashboard
  - Customizable access rights for users

Possible CATI scenarios

- Scenario 1 (Reusable treatments):
  - Entry point: topic instrument
  - Separate treatment surveys for dial/appointment/non-response
- Scenario 2 (Blaise 4 situation):
  - All in one survey
- Scenario 3 (Better separation of administrative and topic data):
  - Entry point: launcher instrument
  - Topic instrument
- Scenario 4 (Envisioned situation, probably in 5.6)
  - Entry point: launcher instrument
  - Multi-scheduler for multiple topic instruments
Scenario 1 – Reusable treatments

- Develop one dial survey
- Develop one appointment survey
- Develop one non-response survey

That are to be used by several instruments (e.g. all social study instruments, or all economic study instruments)
Scenario 2 – Blaise 4 situation

- All in one instrument
  - Use CatiMana.CatiCall.CallResult to set dial result

Social Study 1
Survey
Including dial, appointment and non response handling

Social Study 2
Survey
Including dial, appointment and non response handling

Social Study 3
Survey
Including dial, appointment and non response handling

Social Study 4
Survey
Including dial, appointment and non response handling

Scenario 3 – Separation of data

- Inherit CATI adds administrative data to datamodel
- In preparation for multi-scheduler and case management

Launcher
Survey 1
Including dial, appointment and non response handling

Social Study 1

Launcher
Survey 2
Including dial, appointment and non response handling

Social Study 2
Scenario 3 – Separation of data

- INHERIT CATI moves from Topic instrument to Launcher

- Blaise 5.4 supports only one CATI specification file (.btrx) and one daybatch for all instruments launchable from the launcher

Scenario 4 – Envisioned situation

- No administrative data in topic instruments
- One entry point
### Scenarios compared

<table>
<thead>
<tr>
<th></th>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
<th>Scenario 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Involved instruments</td>
<td>Topic instrument, general treatment instruments</td>
<td>Topic instrument</td>
<td>Launcher, topic instrument</td>
<td>Launcher, multiple topic instruments</td>
</tr>
<tr>
<td>Entry point</td>
<td>Topic instrument</td>
<td>Topic instrument</td>
<td>Launcher</td>
<td>Launcher</td>
</tr>
<tr>
<td>Admin data in topic instr.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Daybatch / .btrx settings</td>
<td>One per topic instrument</td>
<td>One per topic instrument</td>
<td>One per launcher</td>
<td>One per topic instrument</td>
</tr>
<tr>
<td>Reusability</td>
<td>High</td>
<td>Lowest</td>
<td>Average</td>
<td>Highest</td>
</tr>
</tbody>
</table>

### Checklist for using CATI

- Cati roles
- INHERIT CATI
- .btrx:
  - Select fields: Telephone number
- DataEntrySettings: UseCati
- InitialDataEntrySettings
- Defining interviewers
- Keys in main/dial/appointment surveys
- Finish action for parallels that handle a treatment
- Buttons on masterpage/receiptpage to start new case
Using the dashboard

- Demo
  - Settings rights for users
  - Using the filter

Using Manipula

- Daybatch functions in Manipula:
  - Daybatch.Initialize
  - Daybatch_Create
  - Daybatch_Add
  - Daybatch_Mod
  - Daybatch_Del
  - Daybatch_CaseExists

- CATI Specification functions in Manipula:
  - Specification_AddSurveyDay
  - Specification_RemoveSurveyDay
Using Manipula (2)

- Reading the CATI database with Manipula:
  - For custom reports

Recent improvements

- Enable/disable case delivery, extend daybatch
- Active Directory integration
- Automatic handling of cases in multi-mode
- Translatability of dashboard
Blaise 5.5 CATI and future plans

- Added in 5.5:
  - Skills
  - StartCondition
  - OperationHours
  - Custom reports (first version)

- Future plans (5.6 or later)
  - Extend custom reports
  - Appointment control
  - Appointment service
  - Quota
  - Multi-scheduler

Tips and tricks

- Import / Reuse .btrx
- Multi-field keys
- Automatic mapping of fields
Questions

– Thank you for your attention