Using paradata to manage and monitor multi-mode surveys

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What Do We Mean by Mode?

• Administration Modes
  • Interviewer
  • Self

• Technology Modes
  • Paper
  • Computer
    • .EXE
    • Web
    • App

• Device Modes
  • Desktop/laptop
  • Tablet
  • Smartphone

• Survey Modes
  • PAPI
  • CAPI
  • CATI
  • Web
  • Mobile Web
  • Text
  • ACASI
  • SAQ

• Other Data Collection Modes
  • Biomarkers
  • Physical measures
  • Cognitive tests
  • Wearables (e.g., Fitbit)
Four areas by using the paradata

- Multi-mode questionnaire design difference, especially between self-administered and interviewer-administrated methods
- Multi-mode questionnaire data quality, interview interruptions, modes switch, etc.
- Special functions needed for different data modes, such as text reminders, call reminders, and email follow-ups
- How to build a real-time production dashboard for managing multi-mode surveys and identity issues
Self-administered vs. Interviewer-administrated methods

1. Design difference with one instrument
   - Wording, instructions, skip logic, etc.

2. Survey launch method, for example
   - Respondent clicks the email invitation URL
   - Respondent clicks the text reminder URL
   - CATI interviewer surveys with Respondent

3. Device used for filling in the survey
   - Cell phone device being used by the respondents
   - Desktop computer used by the CATI interviewers
Timestamps

Hours:Minutes:Seconds:Thousands of a second

Case ID in Blaise database

Sample ID

Start IW

Audit trail file information

Interviewer ID

Time of first keystroke

Question

Question with changed answer

Complete IW
Using Audit Trail Data Examples

• Total survey time, question-by-question timing
• Mode switch, language switch
• Browser types/device types
• Questions answered/not-answered
• The last question answered
• Key questions’ values
• Survey Portal information
Multi-mode survey protocols

• Most time starting with self-administered mode
  • Email invitation, Email reminder(s), text reminder(s)
  • Reminder calls by the interviewers

• Switch to the interviewer-administered mode
  • self-administered mode still open or closed
  • Resume the cases which has been in-completed Self-administrated mode
Reminder tasks

Automated Batches

- Mails (optional)

  - Emails
    - Multiple templates
    - Multiple times

  - SMS Texting
    - Multiple templates
    - Multiple times

On demand/interviewer involved

- Reminder calls
  - Update contact information
  - Add contact attempt & appointment
  - Mail - place a request
  - Email - send out right away
  - SMS - send out right away.

- Conduct CAPI interview calls
  - Conduct survey
  - Add contact attempt
Production Reports

• Live production reports by modes
• Report the outcome/status (completed, break-off, appointments with the CATI interviewers, etc.)
• Snapshot the critical variables in the survey to identify issues
• QC reports are automatically delivered to managers via emails
• Paradata reporting of Blaise audit data
• Reporting of Blaise Authentication Portal Logging Attempt
• Reporting Interviewer Call Window reporting
Reporting - Generic and Project-Specific

- Project Protocol Reports, Audit Trail data Reports

Statistics of devices from audit trail (including devices from sessions of all web cases, updated every 72 hours):

<table>
<thead>
<tr>
<th>LayoutSetName</th>
<th>OSFamily</th>
<th>DeviceFamily</th>
<th>Count</th>
</tr>
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<tbody>
<tr>
<td>CASI-Large</td>
<td>Windows</td>
<td>Other</td>
<td>337</td>
</tr>
<tr>
<td>CAPI-Large</td>
<td>Windows</td>
<td>Other</td>
<td>516</td>
</tr>
<tr>
<td>CASI_Small</td>
<td>Android</td>
<td>Samsung SM-G998U1</td>
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<tr>
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<td>iOS</td>
<td>iPhone</td>
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<td>Windows</td>
<td>Other</td>
<td>5</td>
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<tr>
<td>CASI-Large</td>
<td>Mac OS X</td>
<td>Mac</td>
<td>59</td>
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<tr>
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<td>Samsung SM-G960U</td>
<td>4</td>
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<tr>
<td>CAPI-Large</td>
<td>iOS</td>
<td>iPhone</td>
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Report - Web Case Summary:

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<tr>
<th>e_Mini</th>
<th>AuthTime</th>
<th>SessionID</th>
<th>IsComplete</th>
<th>QWanted</th>
<th>QAnswer</th>
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<td>B13</td>
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</table>
SQL Server Reporting Services (SSRS) reports

**Calls by Date, by Mode, by Release Drill-Down Table**

<table>
<thead>
<tr>
<th>Call Date</th>
<th>Release</th>
<th>Release Status</th>
<th>Total Calls</th>
<th>Sampled, Incld</th>
<th>Web Survey Status</th>
<th>Call Result Text</th>
<th>Call Iner</th>
<th>Call Time</th>
</tr>
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<tbody>
<tr>
<td>05/08/2022</td>
<td>Web</td>
<td>Web Open</td>
<td>1402</td>
<td>260622</td>
<td></td>
<td>Lisa Bzth</td>
<td></td>
<td>5/8/2022 1:08 PM</td>
</tr>
<tr>
<td>259734</td>
<td>Web Open</td>
<td>4620</td>
<td>By Locator: Contact Person/Other</td>
<td>Juliana Greene</td>
<td>5/8/2022 1:25 PM</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>259734</td>
<td>Web Open</td>
<td>4620</td>
<td>By Locator: Contact Person/Other</td>
<td>Juliana Greene</td>
<td>5/8/2022 1:18 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CONTACT PCT**

ContactDirection (All) 5/9/2022

**Row Labels**

<table>
<thead>
<tr>
<th>Row Labels</th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
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</thead>
<tbody>
<tr>
<td>1-Morning - 10:00:00-11:59:00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-Early Afternoon - 12:00:00-13:59:00</td>
<td>28.6%</td>
<td>28.7%</td>
<td>25.4%</td>
<td>26.8%</td>
<td>30.1%</td>
<td>24.0%</td>
<td>29.5%</td>
</tr>
<tr>
<td>3-Afternoon - 14:00:00-15:59:00</td>
<td>29.8%</td>
<td>26.3%</td>
<td>23.0%</td>
<td>34.6%</td>
<td>31.4%</td>
<td>28.6%</td>
<td>22.2%</td>
</tr>
<tr>
<td>4-Late Afternoon - 16:00:00-17:59:00</td>
<td>24.8%</td>
<td>28.7%</td>
<td>30.3%</td>
<td>27.0%</td>
<td>28.9%</td>
<td>34.7%</td>
<td>28.1%</td>
</tr>
<tr>
<td>5-Evening - 18:00:00-09:59:00</td>
<td>21.5%</td>
<td>31.5%</td>
<td>32.0%</td>
<td>33.6%</td>
<td>25.0%</td>
<td>27.9%</td>
<td>60.0%</td>
</tr>
</tbody>
</table>

**Grand Total**

<p>| | | | | | | | |</p>
<table>
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<td>29.0%</td>
<td>27.4%</td>
<td>30.1%</td>
<td>26.8%</td>
</tr>
</tbody>
</table>
Summary

• Using
  • Blaise Paradata
  • Blaise Survey data
  • Case management tools

• Identify
  • Diffident data collection mode
  • Potential problem with the mode
  • Perform quality control
  • Monitor the progress
  • Improve the efficiency and reduce the cost of multi-mode surveys