Use the Blaise 5 system to implement multi-mode surveys.
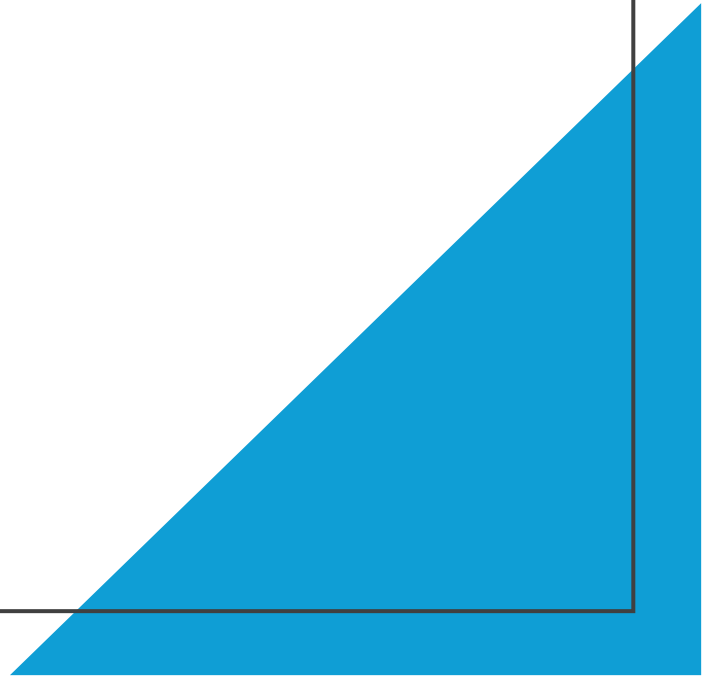
Gina Cheung

CBS Blaise Support Team

Multi-mode or mixed-mode data collection strategies

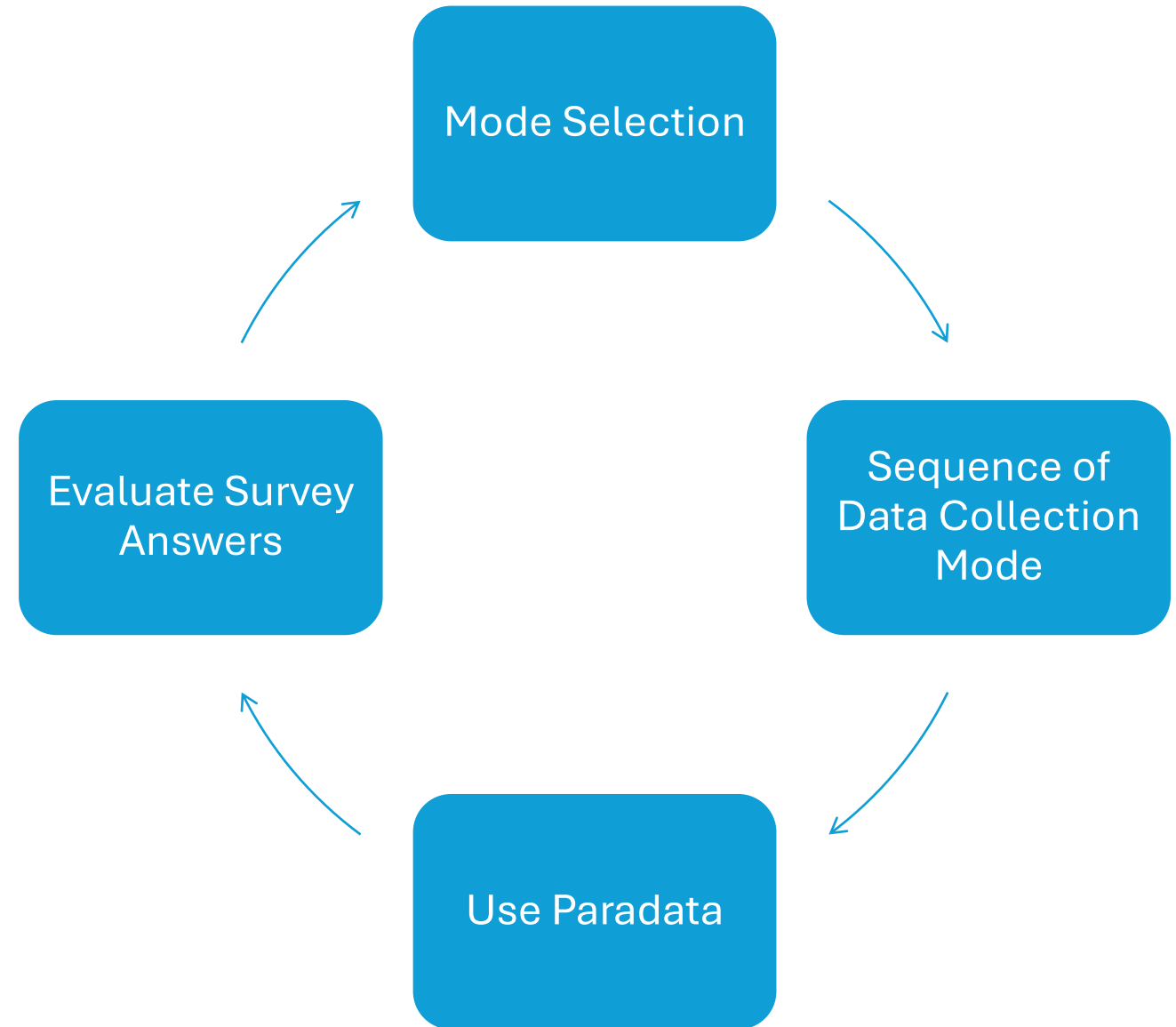|	
Increased Response Rates	Reduced Non-response Bias
Enhanced Accessibility	Improved Data Quality
Cost Efficiency	Flexibility

Some critical elements of multi-mode survey design and system processes

Mode Selection

Sequence of Data Collection Mode

Use Paradata

Evaluate Survey Answers

Use case with Blaise 5 system

A Breakfast Survey

1. 5000 sample lines with email addresses, phone numbers, and addresses.

2. The survey questionnaire is 10 minutes long and mos about what you like to eat for breakfast.

3. All sample lines start with Web mode (self-administrated survey.)

4. After five days, non-response and incomplete web cases will be moved to CATI mode, administered by CATI interviewers.

5. Sequential multi-mode Web -> CATI: Turn off Web mode when the case is moved to CATI.

6. CATI interviewers will use Blaise CATI to receive new cases to call.

7. After five days, non-response and incomplete CATI cases will be moved to CAPI mode, which CAPI interviewers will administer.

8. Sequential multi-mode CATI -> CAPI (turn off CATI mode when the case is moved to CAPI.)

9. After five days, this project will be closed.
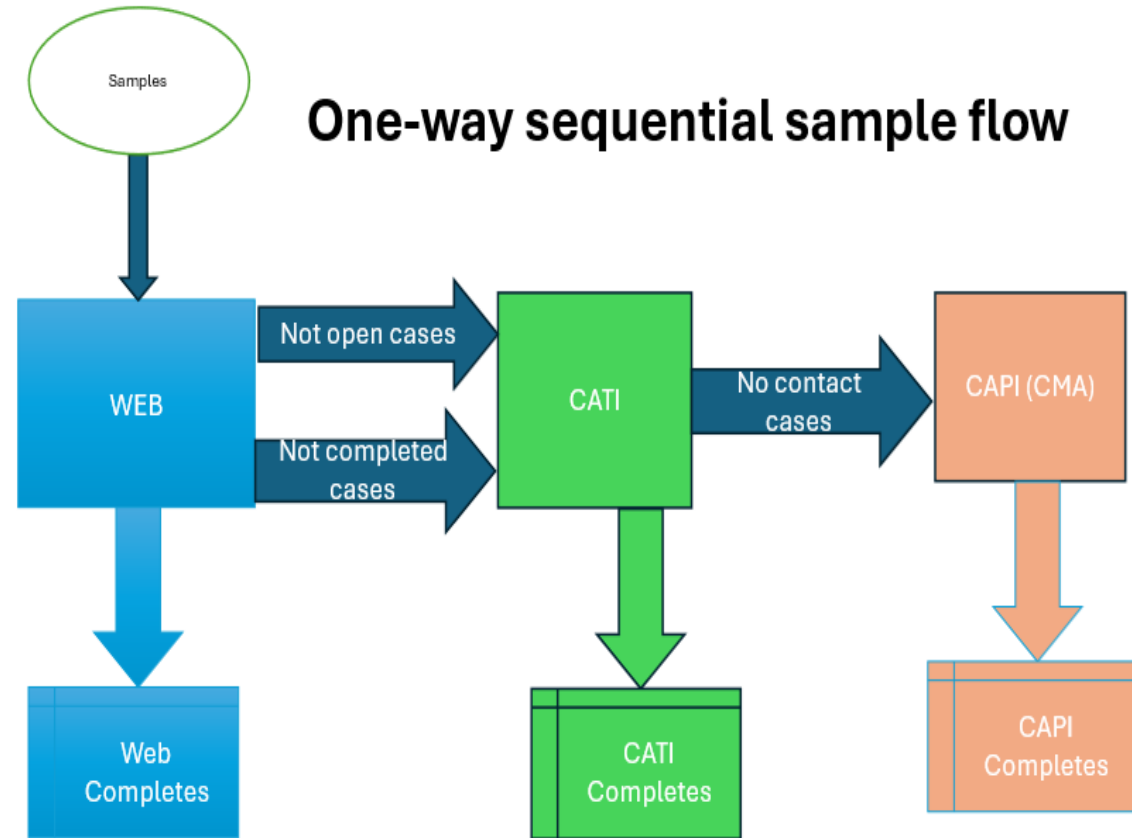
Web Mode Requirements

- The questionnaire display should be responsive, adapting to the device type (mobile phone, tablet, or PC) for optimal user experience.

- To manage survey access, a Web survey auto time-out time should be set up.

- If a case has been completed in Web mode, but the respondent tries to re-access it, a message should inform them that the survey has been completed.

- If a case has been moved to the Computer-Assisted Telephone Interview (CATI) mode, Web access should be closed for that case.

- A portal for the web survey must protect respondents' information and should not use real sample IDs for access.

- The system can gather information about invalid email addresses to ensure effective communication.

Snapshot of Web Mode Dashboard

Login ID	Sample ID	Entry#	DateStamp	CurrentStatus	DeviceType	LastQuestionVisited	Timing	Result Code Text
QNNPEQ	234567	0	**15/4/2024**					
QNNPEQ	234567	1	16/4/2024	Break off	Mobile Phone	Q4	40''	Suspended
QNNPEQ	234567	2	18/4/2024	Completed	PC	Q20	4'5''	Completed
BNGXPB	234568	0	**15/4/2024**	Not Worked				
YCSSLU	234569	0	15/4/2024					
YCSSLU	234569	1	16/4/2024	Break off	Mobile Phone	Q1	5''	Suspended
DSEROX	234555	0	**15/4/2024**	Not Worked				
RWIBGG	235466	0	15/4/2024					
RWIBGG	235466	1	15/4/2024	Break off	Mobile Phone	Q1	5''	Suspended
RWIBGG	235466	2	17/4/2024	Break off	Mobile Phone	Q19	4'	**Completed**
APNWJO	234523	0	**15/4/2024**	Not Worked				
DSEROX	234555	0	**15/4/2024**	Not Worked				
DOHGWX	345323	0	**15/4/2024**	Not Worked				
IFAHCG	345324	0	15/4/2024	Not Worked				
UARIRV	345325	0	15/4/2024	Not Worked				
GUMUVN	345326	0	**15/4/2025**	Not Worked				

CATI Mode Requirements

- Auto cases are delivered to the CATI interviewer, but the case is also accessible by typing in the sample ID (no Auto dial).

- Daybatch parameters: Appointment First, Suspended case first, Not worked case last

- With Multi-mode design, Web Mode info will display for the CATI interviewers; the first CATI calling will be tailored based on the Web mode outcome:

  - For cases suspended on the Web: "Hello, my name is [Interviewer Name]. I am calling about the Breakfast Survey. We see you have started the survey. Is this a good time to complete it over the phone?"

  - For cases never opened on the Web: "Hello, my name is [Interviewer Name]. I am calling for the Breakfast Survey. Is this a good time to answer a few questions about the survey?"
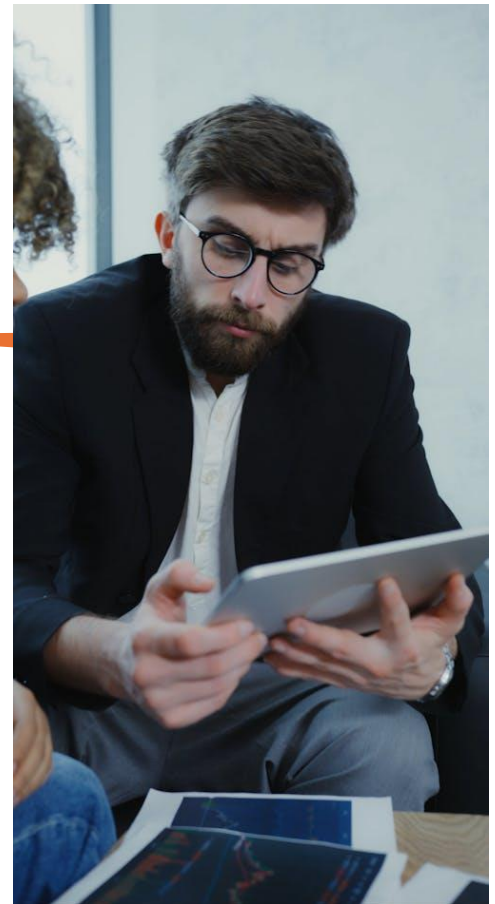
Snapshot of CATI Mode Dashboard

CATI	Sample ID	Contact#	Webmode Status	DateStamp	CurrentStatus	Inverviewer	LastQuestionVisited	Timing	APPT Date	Result Code Text
BNGXPB	234568	0	Not Worked	20/4/2024						
BNGXPB	234568	1		21/4/2024	Completed	Amada	Q20	4'5"		Completed
YCSSLU	234569	0	Suspended	20/4/2024			Q1			
YCSSLU	234569	1		21/4/2024	Break off	John	Q3	30"	22/4/2024	Made appoitnement
DSEROX	234555	0	Suspended	20/4/2024			Q8			
DSEROX	234555	1		21/4/2024		Amada				No Answer
DSEROX	234555	2		22/4/2024		Amada				No Answer
DSEROX	234555	3		23/4/2024		John				No Answer
APNWJO	234523	0	Not Worked	20/4/2024						
APNWJO	234523	1		20/4/2024		Amada			21/4/2024	Made appointment
DSEROX	234555	0	Not Worked	20/4/2024						
DOHGWX	345323	0	Not Worked	20/4/2024						
IFAHCG	345324	0	Not Worked	20/4/2024						

CAPI Mode Requirements

- Blaise 5 Case Management Application For Supervisors:
  - Track the status of each case, such as not started, contact made but respondent not selected, incomplete, complete, etc.
  - Track the number of calls or visits made to each household.
  - Review case notes entered by interviewers.
  - Re-assign cases from one interviewer to another (e.g., from X to Y).
  - Restore all cases for a specific interviewer on a new device.
  - Remove completed cases from the database.

- A centralized database should contain all cases for easy access and management.

- The system has a log file of the interviewers' actions in the case management application, which can be uploaded to the office once a day or on demand.

Snapshot of CAPI Mode Dashboard

IWER	CAPI	Sample ID	Contact#	CATIMode Status	DateStamp	CurrentStatus	LastQuestionVisited	Timing	APPT Date	Result Code Text
Tim	DOHGWX	345323	0	Not Worked	23/4/2024					
	DOHGWX	345323	1		23/4/2024	Completed	Q20	4'5"		Completed
Jenny	DSEROX	234555	0	Suspended	23/4/2024		Q2			
	DSEROX	234555	1		23/4/2024	Break off	Q3	30"	24/4/2024	Made appoitnement
Jenny	IFAHCG	345324	0	Suspended	23/4/2024		Q8			
	IFAHCG	345324	1		24/4/2024					No Contact
	IFAHCG	345324	2		25/4/2024					No Contact
	IFAHCG	345324	3		28/4/2024					No Contact
Tim	APNWJO	234523	0	Not Worked	23/4/2024					
	APNWJO	234523	1		25/4/2024				27/4/2024	Made appointment

ALL Modes Dashboard
at the end of project

LoginID	SampleID	Current Mode	ResultCode Text	Result date	Total Web contact #	Total CATI contact #	Total CAPI contact #
QNNPEQ	234567	Web	Completed	17/4/2024	2		
BNGXPB	234568	Web	Completed	17/4/2024	1		
YCSSLU	234569	Web	Completed	17/4/2024	1		
DSEROX	234575	Web	Completed	17/4/2024	1		
DOHGWX	234576	Web	Completed	17/4/2024	2		
IFAHCG	234577	Web	Completed	17/4/2024	2		
UARIRV	234578	Web	Completed	17/4/2024	1		
GUMUVN	234579	Web	Completed	17/4/2024	1		
RWIBGG	234570	CATI	Completed	22/4/2024	0	2	
SGHVMY	234571	CATI	Completed	23/4/2024	1	1	
VIGYLJ	234572	CATI	Completed	23/4/2024	0	1	
APNWJO	234573	CATI	Completed	23/4/2024	2	2	
FSLKBI	234574	CAPI	Completed	27/4/2024	0	1	1
UIFYSU	234580	CAPI	Suspended	26/4/2024	1	1	0
UEUJUW	234581	CAPI	Not Worked	24/4/2024	0	0	0

Summary of Implementation

Capable of tracking each case's status in the system

Implementing triggers to update statuses dynamically

Combining survey answers, paradata, and session information to understand interactions between respondents and cases
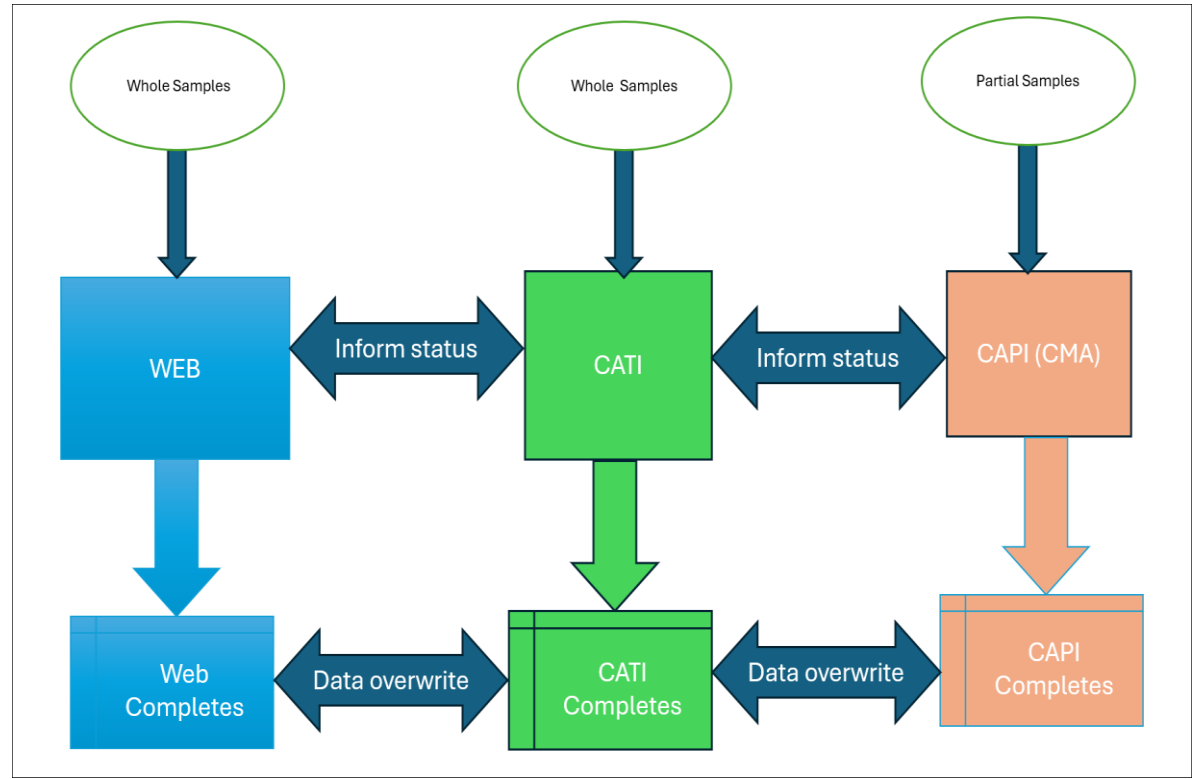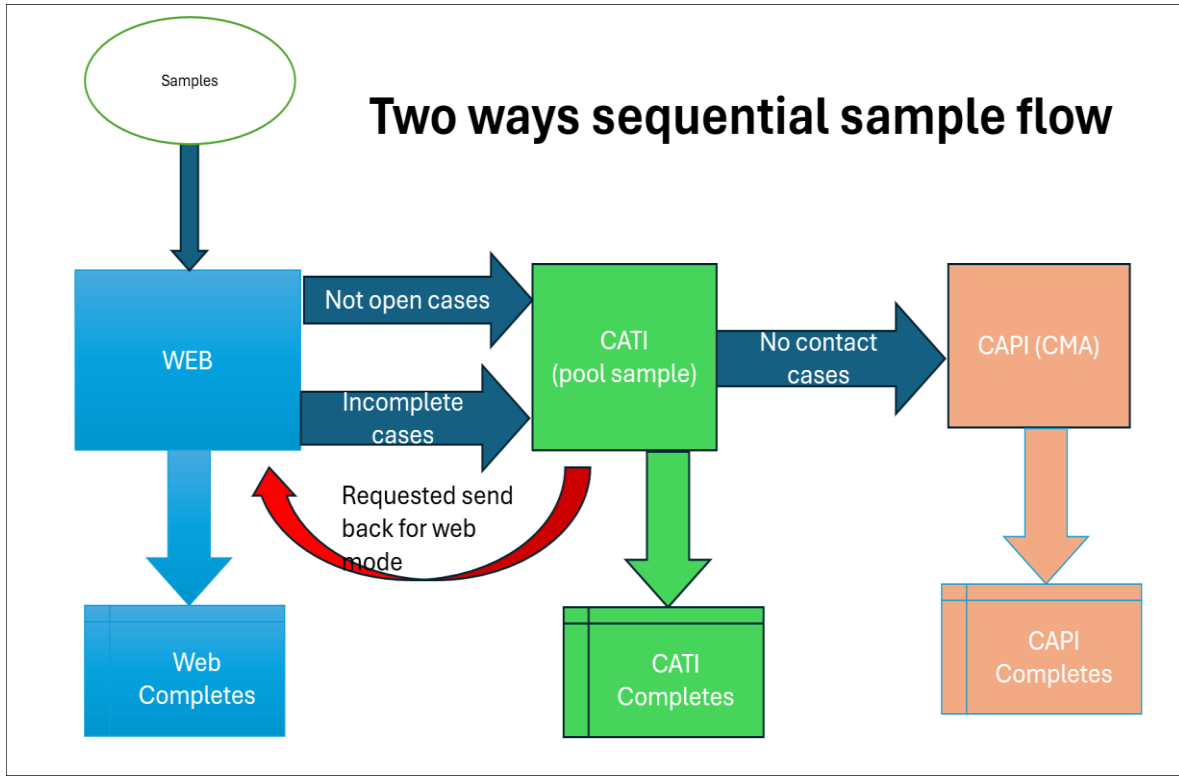
Able to adapt to respondents' needs to change the course of a case

Demonstrating flexibility.

More use-cases in the Blaise 5 system

THANK YOU

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