Survey To Go: Operations System
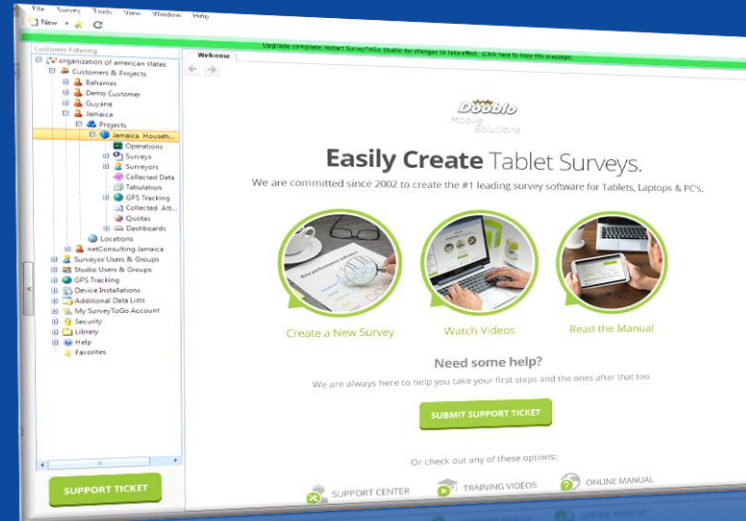
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Overview

- Survey To Go (STG) Operating System
  - Quality Control
    - GPS
    - Duration
  - Approving and returning interviews
  - Reassigning surveyor

- Troubleshooting issues

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The operation console grid allows you to manage the collected results from the project you are assigned to.

– You will be able to view the collected interviews for specified periods.

– Review results and take appropriate actions

- View the work of specific surveyors

- Location and time of interviews

- Transcript of interview

- Approve, return or reassign and interview

Quality Control

On STG there are built in features to ensure the quality of the work produced in the field;
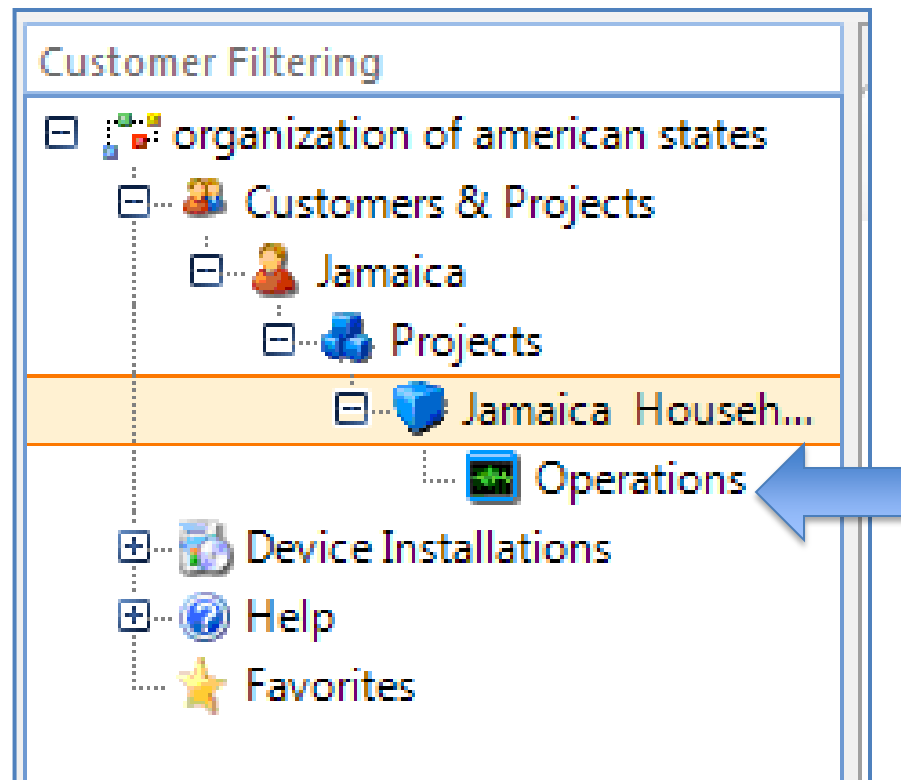
- Skip patterns

- Question filtering

- Conditional Questions

- GPS tracking (GPS Capture)

- Time monitoring (13-45 Mins)

The Operations Console

- The Operations console is found under the project node by double clicking: Customers & Projects> Jamaica> Projects> Jamaica Household Survey> Operations

The Operations Console

Set the parameters for your observations and press GET

- **Observation status**- Requires Approval (ALL surveys are automatically uploaded to this status). If you change the status, then you select it from the list.

- **Dates**- upload date (date on which the interview was uploaded) and visit end date(date the survey started to current date)

- **Surveyors**- Jamaica Surveyors

★**Grid** – Select 'Include Inactive Surveyors' [if a member of your field team used an older version of the questionnaire it will be included.]

★**Edit my columns: You can select and organize the results columns to aid you in the review process.**

Pre-Set Columns

- **Subject ID:** A unique # for each interview

- **Survey Name: Jamaica Household Survey 2016**

- **Index (device index):** The number assigned to each interview saved to the device

- **Survey Version: _**

- **Surveyor:** The user name of the person who conducted the interview

- **Quality Control Flag**: An indication that the interview did not meet one of the QC requirement

- **Net Duration:** The actual time spent interviewing regardless of the device clock

- **Duration:** SubmitTime minus TimeStamp (end time of interview minus start time of interview)

- **Visit start:** The date and time that the interview began

- **Visit end:** The date and time that the interview ended

- **Upload time:** The date and time that the completed survey was uploaded to the system

- **Latitude:** if you see the same coordinates for an interviewer then that is an indication that all interviews were conducted in the same location and requires and explanation

- **Longitude**: if you see the same coordinates for an interviewer then that is an indication that all interviews were conducted in the same location and requires and explanation

- **Current Status:** the status for each survey will be requires approval

The Operations Console

- Now you will be able to see all the surveys conducted under the criteria you set

The Operations Console

- You can further filter your results, to view ONLY the surveyors assigned to you
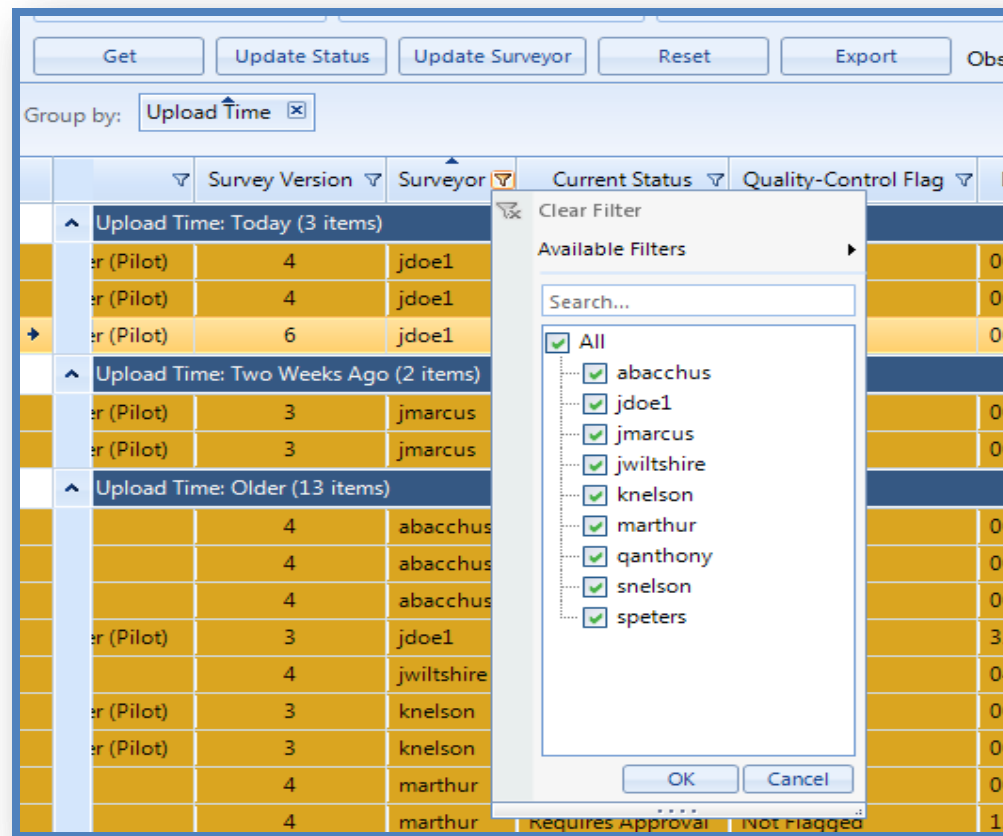
The Observation Screen

The observation screen allows you to review the data of a specific interview.

- To open the Observation screen, double-click on a result to expand it in a new window

- At the very top of the screen will be a notice if the interview has a QC flag

• There will be tabs for: **Data**, Quality Control Score, **Map**, **History** and Scores

The Observation Screen-Data Tab

Top half

- **On the left:**
  - Status: requires approval
  - Subject ID:
  - Index (device Index):

- **The center:**
  - Start,
  - end
  - upload times
  - Surveyor

- **To the right :**
  - Total duration,
  - net duration
  - collected using survey version:
  - latest survey version

Lower half

- **The interview Transcript**
  - List of all the questions and the response for each question

- **The ability to change the status of the survey**
  - Approve
  - Return to Surveyor

The Observation Screen- Data Tab

The Observation Screen- Map

- This tab, shows a pin of the location where the interview took place.
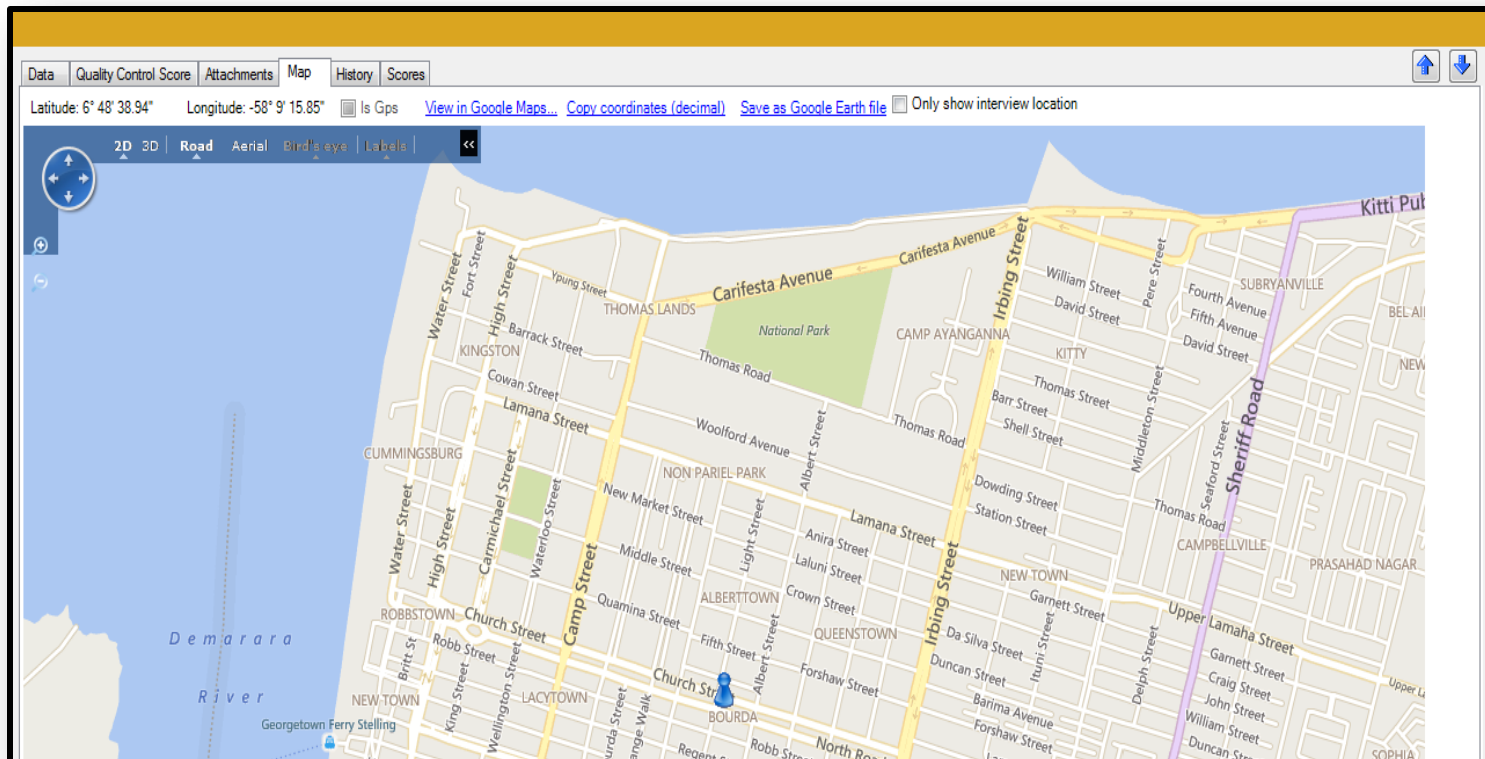
Be on the Lookout

Q.17-Due to the seemly repetitive nature of these questions which can frustrate interviewees, surveyors have been known to fill the response for this question in themselves, based on assumptions. In your review, pay attention to these responses and if your surveyors always have the same response pattern, you may want to question them about it.

Question	Answer
(29) 17b. In approximate terms and considering a normal mo...	
(30) 17c. In approximate terms and considering a normal mo...	7. Between GYD$300,...
(31) In your opinion, please indicate the risk level of:	
(1) 1. Smoking cigarettes sometimes	High risk
(2) 2. Smoking cigarettes often	High risk
(3) 3. Smoking e-cigarettes (hookah pens/hookah sticks) s...	High risk
(4) 4. Smoking e-cigarettes (hookah pens/hookah sticks) o...	High risk
(5) 5. Smoking hookah pipes (tobacco water pipes) someti...	High risk
(6) 6. Smoking hookah pipes (tobacco water pipes) often	High risk
(7) 7. Drinking alcoholic beverages sometimes	High risk
(8) 8. Drinking alcoholic beverages often	High risk
(9) 9. Becoming drunk	High risk
(10) 10. Taking unprescribed tranquilizers/stimulants someti...	High risk
(11) 11. Taking unprescribed tranquilizers/stimulants often	High risk
(12) 12. Using inhalants/solvents to get high sometimes (gl...	High risk
(13) 13. Using inhalants solvents to get high often (glue, pai...	High risk
(14) 14. Smoking marijuana sometimes	High risk
(15) 15. Smoking marijuana often	High risk
(16) 16. Using marijuana in drinks sometimes (teas, juice etc.)	High risk
(17) 17. Using marijuana in drinks often	High risk
(18) 18. Using marijuana in food sometimes (pastries, candy...	High risk
(19) 19. Using marijuana in food often	High risk
(20) 20. Using marijuana for medicine sometimes	High risk
(21) 21. Using marijuana for medicine often	Low risk
(22) 22. Using cocaine sometimes	High risk
(23) 23. Using cocaine often	High risk
(24) 24. Taking ecstasy sometimes	High risk
(25) 25. Taking ecstasy often	High risk
(26) 26. Using crack cocaine sometimes	High risk

Review Criteria

When reviewing an interview, look for the following before making a decision about the validity of the interview.

- Duration
- Variation in location in accordance to the area assigned to work
- Q17
- Survey version

It is advisable to review several interviews from a specific interviewer

before you begin to approve.

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- To approve an interview
  - Go to the "Change status to" field at the bottom of the screen
  - You will see several options, select "approve"
  - Click on "OK" to save and continue.

Returning an Interview

- Depending on the situation, you may need to return an interview to the surveyor to be redone.
  - These may due to:
    - Too many interviews not meeting the duration criteria
    - Survey conducted under the wrong version
    - Surveyor did not conduct a real interview
    - Question 17 may not have been handled correctly.

To Return the interview:

- Go to the **change Status** to field
- Select "**Return to surveyor**"
- Below in the **comment** field, you can state why the interview was returned
- Click on ok to save
  - The next time the surveyor logs in under Wi-Fi, the returned interview will be on their screen, along with your comment. They can then redo the interview

This should only be done after consulting the coordinator

Reassigning an Interview

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In extreme cases, you may need to reassign an interview to a different surveyor. To do this:

- At the top center of the screen, where you can see who the surveyor is,
  - Click on the **change field**
  - Select the new surveyor
  - At the **change status** field, select "**return to surveyor**"
  - In the comments section you can note why that person was receiving the interview
  - Click on ok to save
    - The next time the surveyor logs in under Wi-Fi, the returned interview will be on their screen, along with your comment. They can then redo the interview as per your instructions

This should only be done after consulting the coordinator

Troubleshooting issues

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- **Missing interviews**:

Looking at the operations console Interviews may be missing. Surveyors' records indicates that they performed a larger number of interviews than can be seen in the console.

1. This could be as a result of syncing issues
2. Survey mode
3. STG Error Message
4. Paper based interviews were not entered into the system

Troubleshooting Steps

1. **Cause: Sync Issues-** Connection related such as weak Wi-Fi
   - **Solution:** Verify there are no Wi-Fi connection issues preventing the upload
   - **Possible Actions:**

   1. Ensure internet connection is available (for example you can browse the internet) then try syncing and verify if interviews are uploaded.

   2. Verify that the Server and URL have not been modified by the surveyor. Compare the values to a device where sync is working properly

2. **Cause: Survey Mode** –1. Survey was not moved from Test to Production mode before starting field work.

   2. Survey may be under an older version.

   - **Solution:** 1. If the survey is still in Test mode, then only 10 results will be visible on the console, we will have to contact Dooblo Support for the recovery of the test surveys. Discuss with your coordinator and then contact CICAD.

   2. If the survey is under an older version. Expand your display criteria to include **inactive surveys**, if there are no differences between the questionnaires under the 2 versions, then you can approve it.

   If there are differences between the 2 versions, then you can return it to a surveyor, they can re-do that interview under the correct version.

   Consult with the coordinator before taking these actions

Troubleshooting Steps

3. **Cause: Error Message** related to credit or storage appears
   – **Solution:** Ask the coordinator to verify that the organization has sufficient interviews credits and/or enough storage space for interviews to be uploaded.

4. **Cause: Paper based interviews were not entered into the system**

   – **Solution:** Have the surveyors enter the data from interviews conducted using the paper questionnaire and upload them.
   – **Surveyors should notify their supervisors when they are using the paper questionnaire as when they enter these interviews, it will all register the same location which might not reflect the ED in which they worked and the actual time the interview was conducted.**
   – **These interviews may also record a shorter duration time.**

If results are still missing Contact CICAD

Troubleshooting issues

- ## GPS Capture

Since this study is conducted offline (without Wi-Fi or 3 G connection), in some areas, it may be challenging for the device to pick up a surveyor's location

- – Inside a building
- – Close to a large body of water
- – Rural or wooded area

When this occurs, a surveyor will receive the prompt to "capture GPS" at the end of the interview
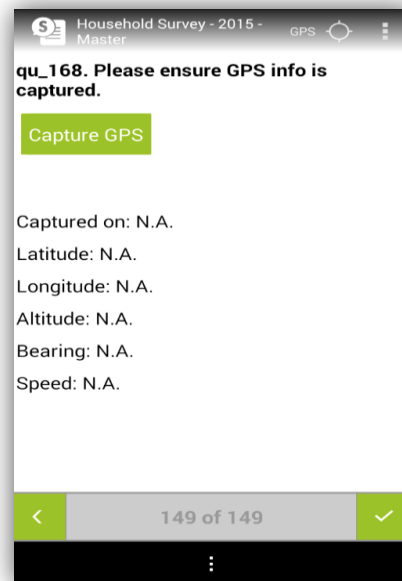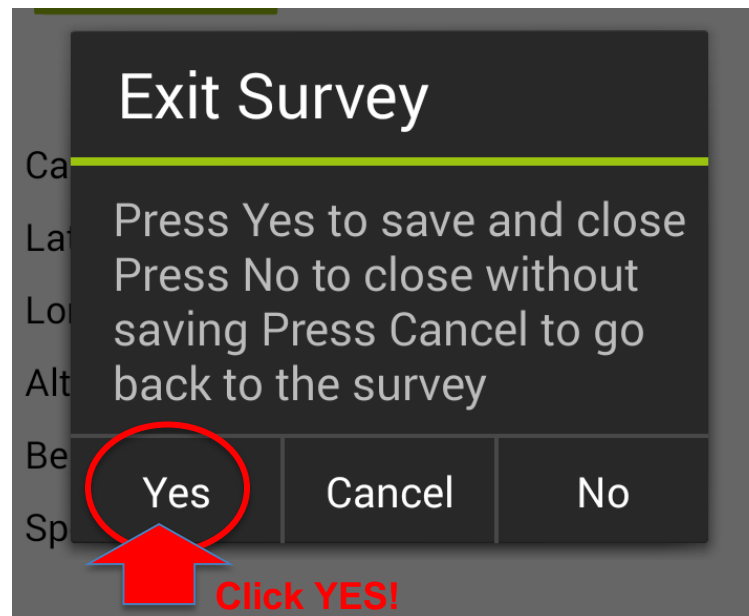
Troubleshooting Steps

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1.   **Cause**: interview occurred indoors or close to body of water

   – **Solution**: Tell the surveyor to step out side or away from the body of water, wait for their location to register to the device and then click the "capture GPS" button. the interview will end and they can proceed to the next interview

2.   **Cause:** Surveyor is working in a rural area, thus GPS will not register even if they are outdoors

   – **Solution**: The interview will have to be saved to the device until the interviewer return to an area in which their location will register.

   – **Action:** Have the interviewer press the back button on the device to exit the program. There you will receive a prompt.

   – Press YES to save and close. By doing this the incomplete interview will be saved on their device, and they will be able to return to it once the device begins to register a location.

Exit Survey

Ca...
Lat...
Lor...
Alt...
Be...
Sp...

Press Yes to save and close Press No to close without saving Press Cancel to go back to the survey

| Yes | Cancel | No |

Click YES!

Surveyor needs to Return to complete an interview:

Cause :

1. There might be cases where the selected interviewee is not available at the time of the visit and the surveyor has to do a **call back**

2. There may be cases where the interviewee can not complete the interview in one visit, this will result in an **incomplete** interview.

Possible Action: The surveyor can exit **and** save the interview.

– The surveyor should record the **Device Index** number of that interview on their field log, along with the name and a contact number for the person they will be returning to interview

– They should establish a date and time for the return and call ahead to confirm the schedule before returning.

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Cause : The interviewee **refuses** to complete the interview halfway into it or the selected person refuses to participate from the beginning despite the efforts by the surveyor to convince the interviewee.

– In these cases, a replacement household will have to be selected for the interview.

Possible Actions:

1. If the interview was never saved to the device. The surveyor can exit that interview **without saving it.** This will allow them to move onto the replacement household and begin a new interview.

THIS IS THE PREFERRED OPTION

Since the interview was not saved, it will not generate a device index number, the surveyor should make a record of this in their field log.

Note: even though the interview was not saved, STG maintains a record of all cancelled interviews on each device under the 6 weeks history tab.

2. If the interview was saved to the device, the surveyor will have to record the device index number on their field log.

  - Upon arrival at the replacement household, they will open the saved interview, click on continue, delete the previous data and enter the details of this new interview.

Cause: There are multiple circumstances that can result in the need for a replacement.

1. After multiple call backs, the selected person is still not available

2. An interviewee refuses to complete a previously started interview

3. A interviewer detects major inconsistencies in the interviewee's responses and questions the validity of the data collected.

4. The supervisor/reviewer detects that the interviews submitted by a surveyor are fake...

Possible actions:

– **1-3:** In all of these cases, the interview was already saved to the device and the device index number was recorded on the field log by the surveyor <u>but were not yet uploaded to the server</u>. In these cases, once the replacement household is determined, the surveyor can return to that interview, delete the previous data and start over.

– **4:** The interview was already uploaded to the server for review. The reviewer can follow the instructions for returning an interview to the same surveyor or to reassign the interview to a new surveyor.

Remember

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- **Communication is the key to successfully executing a survey.**

The End