Using Synchronized Contact Information in Multi-Mode CAPI Projects

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Overview

- Project Operations Database (POD) and CAPI
- Mailsync
- Data duplication
- Grouping households
- Looking to the future
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Project Operations Database (POD)

- Mail, Web, and CAPI (In-person) Studies
- Manage data about sample members’ contact information
- Record and track mailing attempts
- Access Database Front-end
- MySQL tables - Hierarchical model
Contact Management in CAPI Studies

- Headquarters
  - Mailings: Advance Letter, Thank You Postcard, Follow-up SAQ
  - CATI lab: Follow-up phone interview

- In the field (CAPI Interviewers)
  - Telephone calls
  - In-person visits
Contact Information

- Telephone
- Address
- Email
- Person
The Old Days

- Flat format in CASES
  - Only 1 “Home Address”, only 1 “Work Address”, etc
- Tracer
  - 4 separate tables: telephone, address, email, person
  - Collected historical information
  - Still restricted by flat format of CASES
Data Modification in the Field and at Headquarters

- CaseID 10000
- Advance Letter sent out
Data Modification in the Field and at Headquarters

- CaseID 10000
- Advance Letter sent out
- Interviewer begins working the case: telephone calls, knocking on doors
Data Modification in the Field and at Headquarters

- CaseID 10000
- Advance Letter sent out
- Interviewer working the case
- Advance letter sent back undeliverable
- Tracking and Locating Department traces case and adds new address
Data Modification in the Field and at Headquarters

- CaseID 10000
- Advance Letter sent out
- Interviewer working the case
- Advance letter sent back undeliverable
- Tracking and Locating Department traces case and adds new address
- Contact the old address?
Transitioning to Hierarchical Model in CAPI

- Rosters within a case
  - Address
  - Telephone
  - Email
  - Person

- Multiple people and their contact information in a case
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Mailsync

• Asynchronous data transfer program
• Executed on the CAPI laptop during synchronization process
• Import and export into POD (headquarters) and CASES (field)
  • MySQL tables $\leftrightarrow$ CASES rosters
• Data Collision
  • CASES evaluates based on timestamps in CASES and POD
Mailsync: Importing Data from POD to CASES

1. Executes a Perl script that opens each of the 4 MySQL tables and writes out relevant data to text files

2. Runs CASES using Batch Mode and imports the data from the text file using CSMGET

3. The data imported is appended/updated in 4 respective CASES rosters
Mailsync: Exporting Data from CASES to POD

1. CASES writes out relevant data from 4 CASES rosters to text files

2. Executes a Perl script to read text files into 4 MySQL tables
Multi-Mode Studies

[Diagram of a flowchart showing the following steps:
- CAPI and POD
- Follow-up SAQ
- Follow-up Phone Interview
- Next Wave (Longitudinal Study)]
Multi-Mode Studies

Follow-up SAQ

CAPI and POD

Follow-up Phone Interview

Next Wave (Longitudinal Study)
Multi-Mode Studies

Follow-up SAQ

CAPI and POD

Follow-up Phone Interview

Next Wave (Longitudinal Study)
Multi-Mode Studies

- Follow-up SAQ
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Multi-Mode Studies

Follow-up SAQ

CAPI and POD

Follow-up Phone Interview

Next Wave (Longitudinal Study)
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Data Duplication Within Case (Multiple People)

CaseID 10000

Sample Member

Home Address

Wife of Sample Member

Home Address

Work Address

Work Address
Data Duplication within a case

• Why is it a problem?
  • Increased complexity for interviewers and tracers
  • More coding and cleaning
  • Duplicate data = duplicated effort

• Solutions to data duplication?
  • Identify them?
  • Avoid them?
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1st Implementation: Grouping by Household ID

CaseID 10000
Grouping by Household ID

- Relies on household enumeration
  - No household or kinship identifiers in sample
  - POD users cannot enumerate household

- Increased complexity for tracers
  - Arbitrary “household ids”

- Incompatible with hierarchical data structure
  - Priority given to household rather than sample member
Current Implementation: Grouping by Individual

CaseID 10000

Sample Member

Home Address

Work Address

Wife of Sample Member

Work Address
Grouping by Individual

- Does not rely on household enumeration

- Decreased complexity for tracers
  - No need to manage “household identifiers”

- Compatible with hierarchical person structure
  - Priority given to sample member
Grouping by Individual

- CaseID 10000
- Sample Member
  - Work Address
  - Wife of Sample Member
    - Home Address
  - Work Address
Disadvantages of Grouping

• Grouping is a reflection of one point in time

• Increased complexity for interviewers
  • Incorrect groupings make a case harder to manage

• Loss of data about past residences
  • What if two people no longer share the address?
  • “Who gets to keep the house?”
  • Respondent (Sample Member) association flags
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Future Outlook

• Better displays for interviewers/POD users

• Is grouping useful?

• Non-hierarchical data structure?
Thank You!

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