Developing an Effective Notes Review Process for CAPI Studies

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Overview

- What is Notes Review?
- History of CAPI Notes Review
- Evolution of Notes Review system
- Current system & effectiveness
- Lessons learned & next steps
Think back to 2008 when the recession first began. Was there a specific event that made you aware that the recession of 2008 had begun?

1. YES
2. NO
7. DON'T KNOW/NOT SURE
8. REFUSED

If yes: What was it? (Open-ended response)

“Gas prices went up”
“They talked about it on the news”
Example open ended response notes

AA1. [RA1CAA1]
Think back to 2008 when the recession first began. Was there a specific event that made you aware that the recession of 2008 had begun?

1. YES
2. NO
7. DON'T KNOW/NOT SURE
8. REFUSED

If yes: What was it? (Open-ended response)

“There wasn’t a specific event that made me aware”
“Resp has confirmed DOB as XX-XX-XXXX”
What is Notes Review?

- Open-ended responses
- Interviewer comments within interview
- Interviewer comments during contact attempts
- UW Survey Center committed to 100% Notes Review
What is Notes Review?

• Why review notes?
  • Improve data quality
  • Improve interview quality through feedback

• Who reviews notes?
  • When?
  • How?
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History of UWSC CAPI Notes Review

- Fewer, smaller scale CAPI projects
- Supervision & case management conducted by Project Directors
History of CAPI Notes Review

- Wisconsin Longitudinal Study begins
  - Over 12,000 respondents, 50+ CAPI interviewers
  - Respondents scattered across the country
- Transition of CAPI supervision & case management to field

Pre-2009  2009 - 2012  2012 - 2013  2013 - 2016  2016 - Today
History of CAPI Notes Review

- Notes Review handled by Programming staff

- Cost effective staff? Yes

- Timely feedback to interviewers? No

- Project-specific knowledge? No

Timeline:
- Pre-2009
- 2009 - 2012
- 2012 - 2013
- 2013 - 2016
- Today
History of CAPI Notes Review

- Notes Review handled by **Project Directors**

  - Cost effective staff? **No**
  - Timely feedback to interviewers? **Sorta**
  - Project-specific knowledge? **Yes**
History of CAPI Notes Review

- Notes Review handled by CAPI Field Team

- Cost effective staff? Yes

- Timely feedback to interviewers? Better

- Project-specific knowledge? Yes

Pre-2009  2009 - 2012  2012 - 2013  2013-2016  2016 - Today
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• What is Notes Review?

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What do we need to do to make our Notes Review system the most beneficial?

- Make Notes Review efficient
- Make Notes Review timely
- Make Notes Review scalable
Making Notes Review efficient

- Need a place to accumulate notes
- Find ways to automate certain types of note review
- Allow the ability to review note outcomes
  - Per project
  - Per item
  - Per interviewer
Making Notes Review timely

• Want to prevent systematic, recurring errors

• Want to give interviewers relevant notes feedback they can incorporate immediately
Making Notes Review scalable

- UWSC has over 40 CAPI interviewers working simultaneously across 8 field projects

- Each project has its own timeline

- Need a system that easily could add new projects
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Current system & effectiveness

- Field, Project Directors, & Programming collaborated to request a tool to address Notes Review needs
- UWSC programmer Kate Krueger developed the Notes Review Database
Current system & effectiveness
Making Notes Review efficient

- Provides a space to review all notes
- Automatically codes common note strings
- Can view overall status, and allows for sorting by interviewer, item # and case ID
Making Notes Review timely

- Notes Review Database updates notes when you connect – up to date note review
- Notes have date stamps to allow CAPI Supervisors to track interviewer improvements
Making Notes Review scalable

- Notes Review Database can easily add new projects
- Allows for customization on date range review & interviewer review
Current system & effectiveness

• Is it effective?

• Wisconsin Families Study wave comparison
• Wave 1 (2016) review performed periodically
• Wave 2 (2017) review started immediately
Current system & effectiveness

Feedback Per Complete
Wave 1: 0.79
Wave 2: 0.44

Recodes Per Complete
Wave 1: 0.19
Wave 2: 0.05
Current system & effectiveness

• Is it effective?

• Lots of outside factors (veteran interviewers, past feedback, ongoing project)

• Notes Review trending in the right direction
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Lessons Learned

• Notes Review conducted by Field has the most advantages
  • Timely and efficient interviewer feedback
  • Cost-effective

• Proactive
  • Catches interviewer errors early on to prevent repetition of these same errors throughout the field period

• Ultimately provides better quality data to client
Lessons Learned

- Development of the Notes Review Database allowed for more efficient & effective Notes Review
  - Reduction in systematic errors
  - Quicker response time for feedback
  - Flexibility to expand to accommodate new projects
Next Steps

- Further integration of the Notes Review Database with existing UWSC QC tools and technologies
- Review the reviewers
- Improve automated Notes Review functionality
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