

Survey Solutions CAPI for surveys/censuses

Nadi, Fiji

Survey Solutions: Interviewer

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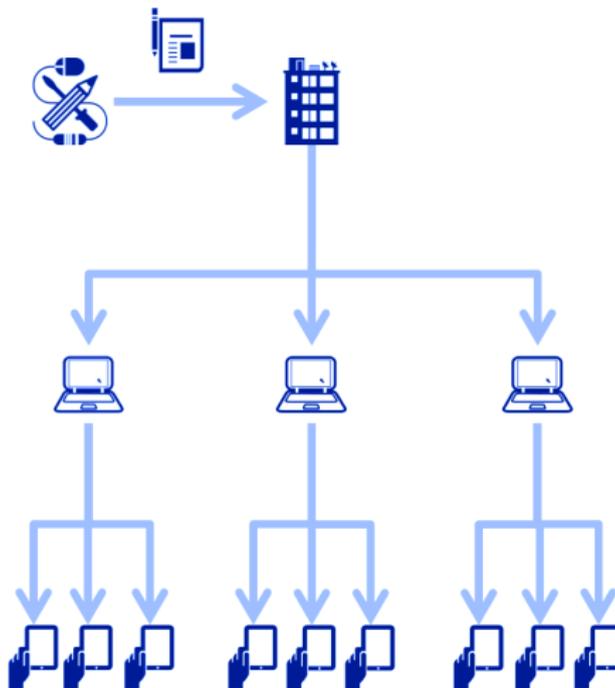
Survey Solutions CAPI

- Survey Solutions consists of multiple components: designer, tester, headquarter, supervisor, interviewer;
- Survey Solutions *interviewer* is the only program the interviewers work with;
- usually the tablets are pre-configured for the interviewers, so that they don't have to change the settings, but simply select the **interviewer** icon to begin working with the software:



interviewer

Survey Solutions CAPI System Overview



Purpose

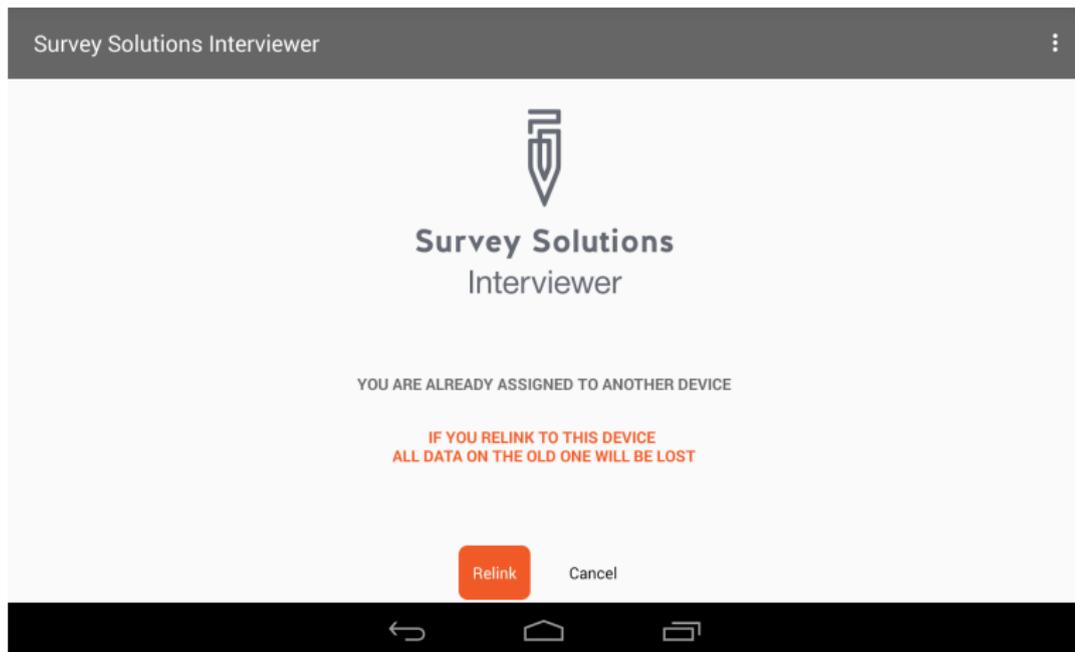
- The purpose of the *interviewer* application is to allow data collection in electronic format, with data validation and flow control;
- This application will also exchange data between various components of the system;
- At the end of the survey, the headquarters will aggregate all data from all devices into a single large database, which can be used by economists, statisticians and other researchers for various analyses.

Application

Survey Solutions Interviewer application:

- works on Android 4.3.1+ devices;
- is installed from the headquarter server (not from Google Market);
- personal model: 1 interviewer = 1 device;

Re-linking



Re-linking a device causes loss of data collected on the original device. Do not re-link a device unless absolutely required!

Main Menu

- Main menu provides access to:
 - login
 - synchronization
 - settings
- Login is a combination of a user name and password that is needed to enter the program and enter data. It is important that each user (interviewer) works under his/her credentials so that the actions of that person are trackable.
Important: do not write the user name and password on the device!
- Settings determine the address of the server for synchronization. Once set up correctly, there is usually no need to change it.
- Diagnostics: various troubleshooting tools.

Dashboard

- After the interviewer logs in, the tablet will display the dashboard.
- The dashboard is a screen that lists all surveys in which the tablet can be used to collect data. It can be one or multiple surveys.
- The dashboard presents assignments by status: new, completed, rejected, etc.
- Interviewer follows the assignments collecting data from selected households or starts new interviews herself for surveys in census mode.

Interviewer dashboard

9 assignments for inter1inter1



New 4

[Started 3](#)

[Completed 1](#)

[Rejected 1](#)

DemoQuest (v2) ×

REGION: **West**

HOUSEHOLD ADDRESS: **123 Main St, Pleasantville, CA**

Started on 10/5/2015 6:33:29 PM

In progress

DemoQuest (v2) ×

REGION: **North**

HOUSEHOLD ADDRESS: **234 Lakeway drive, Sunnydale, Md**

Started on 10/5/2015 6:35:05 PM

In progress

Assignment Status

- Each assignment will have its status, which is one of the following:
 - **New** - assignment is not completed yet; you need to proceed to this household;
 - **Started** - assignment hasn't been completed; there is still work to do;
 - **Completed** - assignment is completed;
 - **Rejected** - assignment was completed earlier, but was rejected by your supervisor.
- If any interviews were rejected by the supervisor, the interviewer must review them for comments of the supervisor and decide whether and how they can be addressed before proceeding to the new households.

Synchronization

- Synchronization is a process in which a tablet receives new assignments (addresses of the households to visit) and sends the collected information to the supervisor.
- More frequent synchronization allows for a faster turnaround time.
- If tablets are stored in headquarters (or a regional office with internet connection) it is recommended that devices are synchronized every time the tablets are checked out and returned.

Data Collection Process: Sample Mode

- 1 Switch on the tablet, start the interviewer application;
- 2 Login;
- 3 Select the survey and an assignment that is not completed yet;
- 4 Proceed to the household;
- 5 Conduct interview: register the responses of the household members;
- 6 Mark the interview as completed;
- 7 If you still have time, proceed to #3 and select the next household.

Data Collection Process: Census Mode

- 1 Switch on the tablet, start the interviewer application;
- 2 Login;
- 3 Locate the next household to be surveyed;
- 4 Click on the survey name to create a new assignment;
- 5 Conduct interview: register the responses of the household members;
- 6 Mark the interview as completed;
- 7 If you still have time, proceed to #3 and locate the next household.

Capturing Data

Capturing data with a tablet and Survey Solutions application is similar to how you could do it with pen and paper, but there are some important differences:

- the assignments are delivered electronically; it is important that data is collected from the sampled households (unless in “census mode”);
- the program will look at the answers as they are entered and attempt to validate them using some built-in rules; if the interviewer is presented with an error message (s)he has a chance of immediately correcting it;
- when data is collected with paper it is important to strictly maintain the sequence of questions and follow the skip patterns. With Survey Solutions CAPI you have more flexibility to record answers: there are no skip patterns, but the questions are enabled and disabled dynamically, depending on the answers to the other questions, that are already answered. Interviewer can follow the questions from beginning to end as it represents a natural sequence for a conversation. In any case it is important to attempt to collect answers to all questions.

Structure of the Questionnaire

- Every questionnaire is different. The structure is the reflection of the decisions implemented in the questionnaire designer.
- Electronic version of a questionnaire is not necessarily an exact copy of the paper version. Even if the electronic version contains same questions as the paper version, interviewers may require additional time to familiarize themselves with its layout and navigation.
- The index of the questionnaire (the side panel) can be called at anytime so that interviewers can jump to the proper section.
- The colors in the index change as the questions are answered. Note that the total number of questions can change during the interview!

Navigation

- It is important that you can find your way around the questionnaire comfortably.
- To help you in this process the program shows you your current location in the questionnaire with a “breadcrumbs” indicator. For example:

General Information on all Household Members > Member roster > Omar

Means that you are recording answers of Omar, who is a member of the household (listed in the members roster).

Navigation

- You can change the answers if you find that the new information you get from the respondent contradicts recorded earlier.
- You can slide up and down to move to previous and next questions within the same chapter.
- If you get confused or lost, use the breadcrumbs or the yellow navigational panel to get out to a more familiar level, then get back to your target location.

Recording Responses

- Most convenient are questions that require only a choice either from two items (like yes and no) or multiple items (like the multiple levels of education). When answering these questions, touch the category that best corresponds to the answer of the respondent.
- Some of the questions may require you to enter text, for example, the name of the respondent. When you tap the corresponding field, you will find that a keyboard appears on the screen. Type in the text by pressing the virtual keys of the keyboard on the screen.
- If the question is about a numeric value, you will see a different keyboard, with only numeric buttons.

Keyboard Practice

- Do not rely on shorthand notation abbreviating words and sentences in the open-ended questions. It is likely that you are going to forget what was the meaning or not have an opportunity to expand them to full answers once the interview is marked as completed.
- To improve your typing speed, practice with the keyboard before getting to the actual interviews!
- Make sure interviewers can switch between typing letters, numbers, and special symbols (like punctuation).
- If responses may involve different languages, make sure the interviewers can switch between different languages.

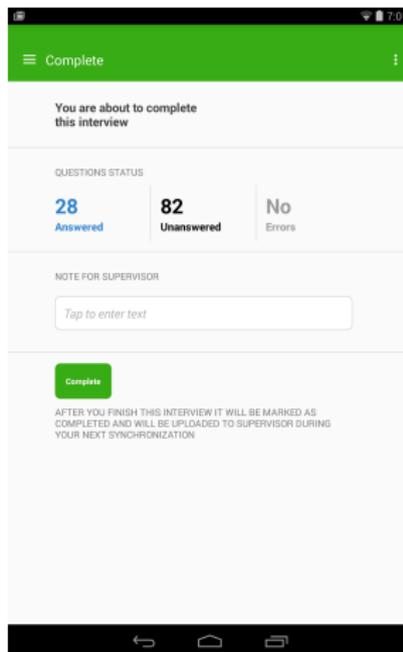
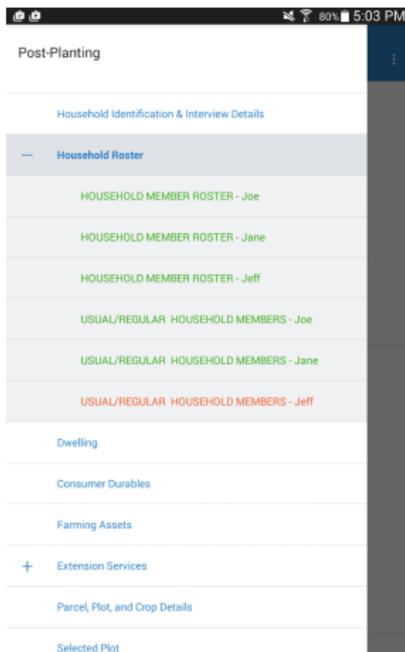
Saving

- No special action is required to save the interview.
- The program automatically records answers as interviewers make their selections in the questionnaire.
- If the program is closed and open again, interview can be restarted from the same place.

Questions Counters

- The interview is completed when there are no more questions to ask;
- To determine whether there are any unanswered questions, check the coloring of the table of contents and final counters indicating number of questions answered and total;
- Green color of the counter corresponds to the situation with all questions answered; blue - there are still some questions to be asked; red - there are some questions with errors.
- Interviewers should attempt to collect the response to all questions the program suggests.

Are all questions answered?



Commentaries

- Occasionally interviewers may find themselves in a situation when it is not possible to get an answer to a question either because the respondent doesn't know the answer or refuses to respond. Interviewers should neither force a response, nor imply the answer themselves!
- When necessary, they should write a commentary to a question by holding their finger on the question text for a while, until a prompt appears to write a commentary.
- The commentary must be precise and specific in explaining the situation to the supervisor.
- Commentaries are exported. Although they are not part of the questionnaire, they are part of communication between the persons involved in data collection, and can be scrutinized to improve the questionnaire.

Completing the interview.

- After all questions are asked and all the answers and commentaries recorded, the interview can be marked as completed.
- Completion of the interview is an important milestone, which indicates that the information just collected can be sent from the device to the central database.
- This will happen at the next synchronization.
- Interviewers can't change completed interviews after synchronization occurs.

Rejected Interviews

- If an interview is rejected by the supervisor it must be reviewed to see supervisor's comments;
- Interviewer can retry the interview to acquire the missing answers or correct the information as required;
- Depending on the situation this may be cleared by phone or a second visit to the household may be required;
- After the problem is fixed interview should be marked as completed again and the device synchronized.
- If the interviewer doesn't understand the reasons for rejection he should contact the supervisor for details.
- Technically, this process can be repeated as many times as necessary. But note that the respondents may reduce their cooperation and stop providing information if they get annoyed.