Internet Self Response Experience

Census Scientific Advisory Committee Briefing

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March 29, 2019
2017 Economic Census Overview

• Establishment-based survey to gather data from approximately 4 million business locations
  • 175,000 Multi-location businesses and 2 million Single-location businesses
• Most comprehensive measurement of the U.S. economy, providing statistics at the national, state, and local levels
• Provides information on industry revenues and other measures of American business performance that are consistent, comparable, and comprehensive across industries and geographic areas
• Conducted every 5 years in years ending in ‘2’ and ‘7’
• 2017 was the first all-electronic Economic Census
Systems to Support 2017 Economic Census

- Respondent Portal (ECORR)
- Customer Relationship Management (CRM) tool
- Content Metadata System (COMET)
- Centurion
Respondent Portal

- Introduced in early 2017
- One web address for all surveys
- Users register once for their own account and select their own password to manage all surveys they participate in
- Self-service options, secure messaging, and electronic reporting all accessible through the Portal
- One-stop shop for Economic survey reporting
- In addition to the Economic Census, currently supports 12 other Economic surveys
Survey Participation Letter

• The same web address https://portal.census.gov will be printed on all survey letters.

• Companies will receive a unique 12-digit Authentication Code for each survey.
Accessing the Respondent Portal

https://portal.census.gov

Respondents will be prompted to ‘Sign in’ or ‘Register’.
Respondent Portal - Register

• Email – serves as User Name.
• Also require First Name, Last Name and Phone.
• Select and Answer 5 Security Questions (for self service when forgetting passwords).
• Passwords expire every 90 days.
• Email link sent to confirm valid email and authenticate user.
• Approximately 2.5 million accounts created since early 2017.
Respondent Portal - Accessing a Survey

My Surveys Page

After signing in, users will land on their ‘My Surveys page’

- ‘Survey Cards’ display after a survey has been added to an account.
- New surveys are added by entering the Authentication Code received in the survey participation letter.
- When collection period has ended, survey card moved to ‘History’ tab.
Respondent Portal - Survey Cards

- Survey name and due date
- Company name and ID #
- ‘Report Now’ link
- Options
  - Request extensions *(if applicable)*
  - Share Survey Access
  - Check filing status
  - View survey FAQs
  - Send message for survey support
  - Survey 800# help line
- ‘i’Survey Information
Respondent Portal - Report Now
Direct link to the online reporting instrument.

- Single Sign-on, no username/password required.
Respondent Portal - Share Survey Access

- Users can share survey access with others by submitting and confirming a valid e-mail address of the ‘delegated’ person.
- Delegates will have full access to the survey.
- Delegates can add additional delegates if needed.
Respondent Portal - Send Message

Respondents can communicate securely with survey representatives

- Sent from active ‘Survey Card’, meaning no special log in requirements
- Can upload attachments (.doc, .xls, .pdf, .txt, and more)
- Users select a Topic to ensure proper routing of their request
- Opportunity to present an FAQ, possibly providing the answer prior to sending their message to survey staff
Customer Relationship Management (CRM) Tool

- Built with a focus on Customer Support and Data Collection
- Used by both NPC interviewers and HQ analysts
- In addition to the Economic Census, currently supports 12 other Economic surveys

Highlights & Benefits
- Organization Search/360 View
- Secure Messaging
- Inbound & Outbound Call Support
- Single CRM tool supporting Economic programs
CRM tool – Organizational Search 360 view

Contacts Tab
- Categorizes contacts based on the interaction mode: Survey Database, Respondent Portal, Organization Contact

Interactions Tab
- Audit trail of all interactions with a particular company
- Inbound/Outbound Calls
- Remail Request
- Extension Request
- Secure Messages
COMET & Centurion

COMET metadata system allows for entry of content and business rules
- Instructions
- Question content
- Response variables and attributes (max length, valid character set)
- Validations (errors, warnings, auto-sums)
- Layout of questions based on pre-defined templates
- Instrument pathing including order of questions, branching, skip patterns

Benefits of COMET rendered Centurion include:
- Analysts enter content instead of specs and hard coding
- Re-use content between paths
  - Supported over 800 paths for the 2017 Economic Census
- Ability for response-driven instrument, making the experience more user friendly
- Changes rendered nightly in instrument for specified paths
- Fully online electronic instrument as opposed to downloadable software in the past
Centurion - Report Dashboard

Lists all surveys needing completion as well as their status

Navigation bar across the top walks respondents through the entire reporting process

Allows respondents to:
- Add missing or new locations
- View a PDF of their survey
- Report via an online survey view
- Report via spreadsheet for multi-location companies
- View help and access online how-to-videos
Centurion - Preview Survey PDF

- Replacement for paper form
- View questions before beginning to report
- Print and use as a worksheet
Centurion - Survey View and Go To

• Response-driven instrument takes respondent through the questions
• Go To functionality allows for going back and forth in instrument once questions are completed
• Question content and layout rendered from COMET
Centurion - Survey View Errors & Warnings

- Validations are entered into COMET as applicable
- Errors allow respondent to continue through Survey View, but not submit
- Warnings allow respondent to continue through Survey View and ultimately submit (if no errors exist)
Centurion - Spreadsheet Reporting Option

- Available for multi-location companies to report for many locations on one spreadsheet
- Respondent selects spreadsheets to download
Centurion - Spreadsheet Upload Results Pop-Up

• Spreadsheet data are edited on upload
• Informs respondent of any data changed or any data not uploaded due to errors
Centurion - Review Screen

- Shows any outstanding errors and warnings
- Allows respondent to go back to screen to fix issue
Centurion - Submission Screen

- Shows respondent which surveys are available to submit (complete with no errors)
- Respondents can submit completed surveys individually or all at once
Centurion - Submission Report

- Shows # of surveys successfully submitted and how many still need to be submitted
- Allows user to print responses to PDF
- Provides link to survey website with previously released statistics
- Have received over 2.7 million electronic responses through this tool for the 2017 Economic Census
Centurion - Response PDF

- Shows users a table of their responses
- Allows users to print or electronically save their responses
Questions for the Committee

1. Paradata are alluding to the fact that some respondents struggle with security requirements that are part of the registration process (5 security questions, passwords expire every 90 days, challenges with resetting passwords). Do you have any recommendations on alternatives to ease respondent burden while still maintaining security?

2. Based on your association with the business community, do you think that with an all electronic collection strategy we are risking a decline in response and do you have any recommendations on how to mitigate that risk?

3. These modernized electronic reporting solutions were built initially for the Economic Census with the goal of implementing for all of our Economic programs. Based on this presentation, what are your recommendations on next steps?
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