

PART E

WEBCATI
FRONT AND BACK
OF THE INSTRUMENT

April 2015

PART E, CHAPTER 1

WEBCATI ITEMS FOR CPS

WebCATI is the name for the Census Bureau's control system that handles the telephone center software used for computer-assisted telephone interviewing (CATI). The WebCATI system is a control system for running Blaise and other telephone center software.

When you first enter a case, you will go through a series of screens in the WebCATI and in the CPS instrument to confirm critical information so you can conduct the interview. The screens take you through:

1. Recording the correct dial outcome
2. Obtaining the correct respondent
3. Verifying the correct address

The following sections detail the screens in WebCATI which you will use to get into the interview, and the introductory screens in the CPS instrument which you will use to start the interview.

Getting Into the Instrument

System Time: 3:28 PM EDT Page Timer:	
USER TASK MENU - INTERVIEWER ROLE	
1. <u>Conduct an Interview</u>	
ADMINISTRATIVE TASKS	
2. <u>User Administration</u>	
GENERAL TASKS	
3. <u>Logout of WebCATI</u> <i>Make sure you logout of WebCATI every day.</i>	

Main Menu - screen

Main Menu

This is the first screen you will see when you access the WebCATI system. To begin interviewing, click <Conduct an Interview> or press <ENTER> if <Conduct an Interview> is displayed in red, meaning it is the default selection.

Figure E1. Select a Survey - screen

System Time: 3:30 PM EDT Page Timer:	
PLEASE SELECT A SURVEY	
Survey - Select -	
 Main Menu <ESC>	Select Survey >>

Select a Survey

This screen is where you select a survey to login to. Click the arrow on the drop down menu, then highlight the survey name. Once done, click <[Select Survey](#)> to proceed.

Figure E2. Assign Skills - screen

Assign Skills		System Time: 3:14 PM EDT Page Timer: 50 s	
CPS00001 Logged in for 19 m 49 s		SKILLS FOR THIS SESSION ON SURVEY: CPS_CA	
Show WebCATI Messages		☒ Refusal Conversion Specialist	
Back To...		☒ Spanish	
NAVIGATION			
 Main Menu <ESC>		Accept Skills >>	

Assign Skills

This screen lists the different skillsets assigned to you for conducting specialized interviews (foreign language, refusal conversion, etc). If any of the skills assigned to you are incorrect, notify your supervisor immediately. To accept the skills assigned, click <[Accept Skills](#)>.

Figure E3. Conduct Interview - Case Search – screen

CPS00001
Logged in for 30 m 29 s
[Show WebCATI Messages](#)

SURVEY	CASE ID	CONTROL #	RESPONDENT
cps_cat1	00000055	01990064999 A63 55	

CONDUCT INTERVIEW

You are currently logged in to **cps_cat1**. [Change Surveys](#).

- The 'Get Next Case' option is not available for *TRAINING* surveys.

SEARCH FOR SPECIFIC CASE

Survey: [CLEAR](#) Active Cases Only:

Company:

Respondent:

Case ID: [Add More](#) Control #:

Phone #: () - x Active Phone Only:

Int. Phone #: Only Cases on Hold:

1. [Search >>](#)

Conduct Interview - Case Search

The “*Conduct Interview - Case Search*” screen acts as your control center for accessing cases. Here you can access the next available case in the queue, search for a specific case(s), or return to the main menu.

Get Next Case

Click on <[Get Next Case](#)> to bring up the next available case in the queue. This will take you to the “*Case Notes*” screen of the launched case.

Search

The data fields immediately below the ‘Search for Specific Case’ banner can be used to find cases that match certain criteria. Once you have entered any necessary data in the search filters, click on <[Search](#)> to display the cases that match the search criteria.

To search all surveys, click the “clear” link. To search a specific survey, highlight that survey in the survey window.

Note: Change Yes to No in the Active Cases Field to see both active and closed when searching for a case.

Incoming calls

If there is an incoming call and the case needs to be pulled up, there are a few ways to find the case. The best options are searching by Case ID or Phone Number. The caller may

be able to provide the Control # if they are referring to their advance letter. Otherwise, they can provide the phone number where the message was left. You may use more than one filter in your search.

CPS00001 Logged in for 30 m 29 s Show WebCATI Messages	MOST RECENT CASE			
	SURVEY	CASE ID	CONTROL #	RESPONDENT
	cps_cat1	00000055	01990064999 A63 55	
	CONDUCT INTERVIEW			
	You are currently logged in to cps_cat1 . Change Surveys . • The 'Get Next Case' option is not available for <i>TRAINING</i> surveys.			
SEARCH FOR SPECIFIC CASE				
Survey: cps_cai3 cps_cat1 CLEAR		Active Cases Only: Yes		
		Company:		
		Respondent:		
Case ID: Add More		Control #:		
Phone #: () - x		Active Phone Only: No		
Int.Phone #:		Only Cases on Hold: No		
1. Search >>				

Main Menu

Click on <[Main Menu](#)> to return to the “Main Menu” screen.

Figure E4. Conduct Interview - Search Results - screen

Page: 1 2 3 4 5 6 7 8 9 10 11 ... 51							
	SELECT	STATUS	SURVEY	CASE ID	CONTROL #	RESPONDENT / COMPANY	AGENDUM
1	SELECT	TRAINING	cps_cat1	00000001	01990064999 A63 01	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							
2	SELECT	TRAINING	cps_cat1	00000002	01990064999 A63 02	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							
3	SELECT	TRAINING	cps_cat1	00000003	01990064999 A63 03	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							
4	SELECT	TRAINING	cps_cat1	00000004	01990064999 A63 04	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							
5	SELECT	TRAINING	cps_cat1	00000005	01990064999 A63 05	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							
6	SELECT	TRAINING	cps_cat1	00000006	01990064999 A63 06	RICK MARTINEZ	Search [7]
PHONE NUMBERS: (555) 222-2222 , (555) 258-3625							

Conduct Interview - Search Results

This screen appears if you've run filters to search for a specific survey case, Survey ID, or cases. For each case the table lists the case status, Case ID, control #, respondent name (if available), available phone numbers, and the current agenda code assigned.

If there is more than one page of cases available to view, click on the page number(s) listed above or below the results table.

To select a particular case, click on the [<select>](#) link in the row of the respective Case ID.

Beginning an Interview

Figure E5. Notes – screen

Notes		Case ID: 00000055	Status: Never tried (new case)	Respondent: 2:31 PM CDT
TRAINING: cps_cat1		Cntrl #: 01990064999 A63 55	Closeout: 12/31/2007	Page Timer: 3 m 30 s
CPS00001 Logged in for 10 m 49 s		Notes	Case History	Previous History
Show WebCATI Messages		Roster	Appointments	Boost/Block
		Contact	FEFU Error Tally	Other Info
RESPONDENT				
RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997		MIS CODE: 04		
LANGUAGE		*****CATI NOTES 19:25:10 01-18-2006 FR CODE: ALBE0002 -HESITANT RESPONDENT VERY RELUCTANT AT FIRST		
Language - English				
SPECIAL SKILLS				
Skill - No Special Skills				
CASE DETAILS				
Case History Records				
Case Notes				
Case Phone Numbers				
Case Roster				
Edit Notes				
HELP				
Phone Number Lookup				
Restore Case				
NAVIGATION				
1. Not attempted/ Quit before dialing				
2. Go to DIAL »				
3. Incoming Call »				

Notes

Once you access the next available case (or select a case from your search results), the “Notes” screen is the first screen you come to. Here you can: view case notes from the CPS interviews and from the previous CPS interviewer (if applicable), view the Case History, view the Previous History, and check the Household Roster. On the left side of the screen are options to do such things as: indicate a foreign language is needed, request special interviewing skills, etc.

Click on <[Go to DIAL](#)> to proceed to the “Dial” screen.

Click on <[Not attempted / Quit before dialing](#)> to exit the case prior to dialing the phone number.

The <[Incoming Call](#)> option will display if you have selected a specific Case ID. Click on <[Incoming Call](#)> to indicate that the respondent has initiated contact to conduct the interview.

This will take you directly to the instrument to begin interviewing.

Additional Case Information

Notes	Case History	Previous History	Boost/Block	Other Info
Roster	Appointments	FEFU Error Tally	Case Grouping	Mailing Address
Contact				

Once you enter a case in WebCATI, at the top of the “Notes” screen are tabs that you can click on for more information about the case, such as:

- **Case History**
- **Previous History (CPS outcomes)**
- **Boost/Block Information**
- **Roster**
- **Appointments**
- **Mailing Address**

The default view is the Notes tab, hence it is the first screen you encounter once you enter a case. When clicking on any of the Case Information tabs, the Navigation links at the bottom of the screen remain constant so you may proceed through the case without having to navigate back to the original “Notes” screen.

Tabs that are blue in color are active tabs that you may view. Tabs grey in color are not accessible at that time because there is no information associated with the tab. Tabs will become active when there is data available, such as once you make an appointment, then the Appointment tab will have data associated with it.

You may click on any active tab at any time.

Figure E6. Case History – screen

Notes	Case History	Previous History	Boost/Block	Other Info
Roster	Appointments	FEFU Error Tally	Case Grouping	Mailing Address
Contact				

FULL SCREEN  | PRINT 

	#	DATE	START TIME	END TIME	USER	OUTCOME
	2.	05/02/2006 EDT	Case Split		?Q SYSTEM	162 - Case Split
	1.	05/02/2006 EDT	Case Installed		?Q SYSTEM	161 - Case Installed

Case History

This screen displays the case's call history. The table in the middle of the screen lists date, start time, end time, interviewer code, and outcome.

The most recent call attempt is listed first. To view previous call attempts that may not be visible, use the scroll bar inside the table to display the rest of the call attempts.

Previous History

This tab displays the interview outcomes from the CPS. See Appendix 3 for CAPI and Appendix 4 for CATI for a list of the outcomes.

Boost/Block

The boost/block tab will display the time slots for this case and whether or not a boost or block has been set. Setting boosts and blocks is covered on page E3-8 and E3-9.

Figure E7. Roster - screen

Roster Case ID: 00000055 Status: Never tried (new case) Respondent: 2:36 PM CDT
TRAINING: cps_cat1 Cntrl #: 01990064999 A63 55 Closeout: 12/31/2007 Page Timer: 10 s

CPS00001
Logged in for 16 m 17 s

• [Show WebCATI Messages](#)

Back To...

RESPONDENT
RICK MARTINEZ
901 RAZORBACKS WAY
ANYTOWN KS 99997-997

LANGUAGE
• [Language - English](#)

SPECIAL SKILLS
• [Skill - No Special Skills](#)

CASE DETAILS
• [Case History Records](#)
• [Case Notes](#)
• [Case Phone Numbers](#)
• [Case Roster](#)
• [Edit Notes](#)

HELP
• [Phone Number Lookup](#)

Notes Case History Previous History Boost/Block Other Info
Roster Appointments FEFU Error Tally Case Grouping Mailing Address
Contact

FULL SCREEN | PRINT

NO.	NAME	GENDER	AGE	BIRTHDATE	RELATIONSHIP	REF.	O.S.P.	RESP.	COMPLETE
1	RICK MARTINEZ	M	35	04/15/1970		✓		✓	
2	CINDY MARTINEZ	F	33	05/15/1972	SPOUSE				
3	JULIO MARTINEZ	M	8	06/15/1997	CHILD				
4	MARIE MARTINEZ	F	7	06/20/1998	CHILD				
5	SUSAN GONZALEZ	F	68	05/13/1937	PARENT				

NAVIGATION

1. [Not attempted/ Quit before dialing](#)
2. [Go to DIAL »](#)
3. [Incoming Call »](#)

Roster

The roster screen displays the names of all household members that were provided in the last CPS interview. The first person on the roster should be the **reference person** for CPS. Gender, age, birth date, and relationship to the reference person are also displayed (if provided during a previous interview).

A check mark in the **RESP** column indicates that the household member is the household respondent.

Appointments

The appointment tab will display appointments that have been set for this case. How to set appointments is covered on page E3-4 through E3-7.

Mailing Address

The mailing address tab will display the mailing address for this case.

Figure E8. Dial – screen

Dial		Case ID: 00000055		Status: Never tried (new case)		Respondent: 2:37 PM CDT	
TRAINING: cps_cat1		Cntrl #: 01990064999 A63 55		Closeout: 12/31/2007		Page Timer:	

CPS00001 Logged in for 17 m 10 s		PHONE STATUS KEY: Active Eligible Ineligible					
Show WebCATI Messages Back To... ▼							
RESPONDENT RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997							
LANGUAGE Language - English							
SPECIAL SKILLS Skill - No Special Skills							
CASE DETAILS Case History Records Case Notes Case Phone Numbers Case Roster Edit Notes							
HELP Phone Number Lookup							

PERSON AT THIS PHONE	TYPE	WHEN	PHONE NUMBER	TIME ZONE	ATTEMPTS	STATUS
	Home		(555) 222-2222	CDT	0	Untried
CINDY MARTINEZ	Cellular or digital		(555) 258-3625	CDT	0	Untried

NAVIGATION	
1. Not attempted/ Quit before dialing	3. Dial Selected Number >>
2. Call Directory Assistance	

Dial

This screen displays the available phone numbers for the case. The active phone number is always a light-yellow color, and on top. Untried or eligible phone numbers are in white and uneligible are in a blueish gray color. Click on [Dial Selected Number](#) to proceed to the “Dial Outcome” screen.

- There may be more than one phone number given for the case.
- The field “Person at this Phone” is not filled because the phone number may or may not be a phone number for the CPS respondent. For instance, the work phone in this case could be for the spouse of the respondent. For this reason we leave this field blank in CPS.

Figure E9. Dial Outcome – screen

Dial Outcome		Case ID: 00000055	Status: Never tried (new case)	Respondent: 2:38 PM CDT
TRAINING: cps_cat1		Cntrl #: 01990064999 A63 55	Closeout: 12/31/2007	Page Timer:

CPS00001 Logged in for 18 m 2 s Show WebCATI Messages Back To...	You have chosen to dial: Phone: (555) 222-2222 Person at This Phone: Phone Notes: To choose a different phone number, go back and View Phone Numbers again.
---	--

RESPONDENT (555) 222-2222 RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997	LANGUAGE Language - English
SPECIAL SKILLS Skill - No Special Skills	RECORD YOUR DIAL ATTEMPT
CASE DETAILS Case History Records Case Notes Case Phone Numbers Case Roster Edit Notes	1. Fax machine reached NO message sent 8. Start Interview » 2. Ring no answer 3. Normal busy/circuits busy 9. Recorded Message / Privacy Service 4. Fast or WATTS/FTS busy 5. No signal or funny signal 10. Other Problems 6. Bad connection
HELP	

Dial Outcome screen

This screen lists the various dial outcomes, the telephone number to dial, and the household respondent's name and address. If a person answers the phone, click on item 8, <Start Interview>.

Fax Machine

If a FAX machine reached NO message sent and no message is left, click on this link to go to the "Case Notes" screen. WebCATI will then bring up the case fifteen minutes later to retry the phone number. If you reach a fax a second time, WebCATI will send you to "Case Notes".

Ring no answer

If there is no answer to the phone call (no live voice, no message recording, no funny signal, etc.), click this link to go to the "Case Notes" screen.

Normal busy / circuits busy

If you get a normal busy tone or a tone that indicates that circuits are busy, click this link to proceed to the "Case Notes" screen.

**Fast or WATTS/
FTS busy**

If you get a FAST busy tone, click on this link to proceed to the “*Dial Retry*” screen. It will instruct you to immediately dial the number again to try and obtain contact.

**No signal or
funny signal**

If you receive a funny signal (or no signal) after dialing the phone number, click this link to proceed to the “*Dial Retry*” screen. It will instruct you to immediately dial the number again to try and obtain contact. If on the redial attempt the same results are obtained, indicate a ‘no signal or a funny signal’.

Bad connection

When getting a bad connection after dialing a phone number, click this link to proceed to the “*Dial Retry*” screen. It will instruct you to immediately dial the number again to try and obtain contact. If on the redial attempt the same results are obtained, indicate a ‘bad connection’.

After the second attempt, the instrument will go to the Notes screen.

**Not attempted /
Quit before dialing**

If for some reason you want to exit the case, but still haven’t yet dialed the phone number, click this link to go to the “*Provide Reason*” screen - and ultimately exit the case.

**Recorded Message /
Privacy Service**

Click on this link when you hear a recorded message such as: an answering machine, a temporarily out of service message, a service disconnected message, a number has been changed message etc.

The link takes you to the “*Recorded Message*” screen where you record the dial outcome in more detail.

Other Problems

Click on this link when you encounter a problem during the call, such as: an immediate hangup, a refusal, the respondent speaks a foreign language, or a message referring to a privacy or call block feature.

The link takes you to the “*Problem with call*” screen where you record the call problem in more detail.

Start Interview

If someone answers the telephone, click this link to proceed to the instrument.

Figure E10. Dial Retry– screen

Dial Retry		Case ID: 00000055	Status: Never tried (new case)	Respondent: 2:40 PM CDT
TRAINING: cps_cat1		Cntrl #: 01990064999 A63 55	Closeout: 12/31/2007	Page Timer:

CPS00001 Logged in for 20 m 24 s • Show WebCATI Messages Back To... RESPONDENT (555) 222-2222 RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997 LANGUAGE • Language - English SPECIAL SKILLS • Skill - No Special Skills CASE DETAILS • Case History Records • Case Notes • Case Phone Numbers • Case Roster • Edit Notes HELP	A dial outcome of Fast or WATTS/FTS busy was recorded. Please DIAL AGAIN, and record the outcome below. Phone: (555) 222-2222 Person at This Phone: Phone Notes: <table border="1"> <tr> <th colspan="2">RECORD YOUR DIAL ATTEMPT</th> </tr> <tr> <td>1. Fax machine reached NO message sent</td> <td>8. Start Interview »</td> </tr> <tr> <td>2. Ring no answer</td> <td>9. Recorded Message / Privacy Service</td> </tr> <tr> <td>3. Normal busy/circuits busy</td> <td>10. Other Problems</td> </tr> <tr> <td>4. Fast or WATTS/FTS busy</td> <td></td> </tr> <tr> <td>5. No signal or funny signal</td> <td></td> </tr> <tr> <td>6. Bad connection</td> <td></td> </tr> </table>	RECORD YOUR DIAL ATTEMPT		1. Fax machine reached NO message sent	8. Start Interview »	2. Ring no answer	9. Recorded Message / Privacy Service	3. Normal busy/circuits busy	10. Other Problems	4. Fast or WATTS/FTS busy		5. No signal or funny signal		6. Bad connection	
RECORD YOUR DIAL ATTEMPT															
1. Fax machine reached NO message sent	8. Start Interview »														
2. Ring no answer	9. Recorded Message / Privacy Service														
3. Normal busy/circuits busy	10. Other Problems														
4. Fast or WATTS/FTS busy															
5. No signal or funny signal															
6. Bad connection															

Dial Retry screen

The Dial Retry screen appears after selecting either: Fast or WATTS/FTS busy, No signal or funny signal, or Bad connection on the DIAL screen to prompt you to dial the phone number again. An instruction on the screen will say “Please DIAL AGAIN, and record the outcome below.”

When clicking on either of these three links a second time, the system will proceed to the “Case Notes” screen to exit the case.

Note that the Dial Retry screen looks very similar to the Dial screen.

Figure E11. Recorded Message - screen

CPS00001 Logged in for 27 m 17 s • Show WebCATI Messages Back To... v RESPONDENT (555) 222-2222 RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997 LANGUAGE • Language - English SPECIAL SKILLS • Skill - No Special Skills CASE DETAILS • Case History Records • Case Notes • Case Phone Numbers • Case Roster • Edit Notes HELP • Phone Number Lookup • Restore Case	ANSWERING MACHINE / VOICE MAIL Answering machine/service (correct unit) - Message left. Answering machine/service (correct unit) - No message left. Unknown answering machine/service - Message left Unknown answering machine/service - No message left PRIVACY SERVICE Privacy screening service (correct unit) - Message left. Privacy screening service (correct unit) - No message left. Unknown unit with privacy screening - Message left Unknown unit with privacy screening - No message left NUMBER CHANGED <table border="1"> <tr> <td>9. New Number Given</td> <td>AREA CODE</td> <td>PREFIX</td> <td>SUFFIX</td> <td>EXTENSION</td> </tr> <tr> <td>10. No Number Given</td> <td>()</td> <td> </td> <td> </td> <td>x </td> </tr> </table> OTHER OUTCOMES Number not in service Normal busy/circuits busy Number could not be completed as dialed Temporarily not in service	9. New Number Given	AREA CODE	PREFIX	SUFFIX	EXTENSION	10. No Number Given	()			x
9. New Number Given	AREA CODE	PREFIX	SUFFIX	EXTENSION							
10. No Number Given	()			x							

Recorded Message

When clicking on <[Recorded Message](#) / [Privacy Service](#)> at the “*Dial Outcome*,” or “*Dial Retry*” screens, you are sent to the “*Recorded Message*” screen to record which type of message you have received. There are fourteen types of outcomes to select from this screen.

ANSWERING MACHINE / VOICE MAIL

Answering machine / service (correct unit) - Message Left

Click this link to record that you have reached an answering machine or service, the message indicates you reached the correct household, and have left a message. Messages should only be left only once a day.

Document that a message was left in the “*Case Notes*”.

Answering machine / service (correct unit) - No Message Left

Click this link to record that you have reached an answering machine or service, the message indicates you reached the correct household, and you have NOT left a message.

Document that a message was NOT left in the “*Case Notes*”.

Unknown answering machine / service - Message left

Click this link to record that you have reached an answering machine or service, the message does not indicate whether or not you reached the correct household, and have left a message. Messages should only be left only once a day.

Document that a message was left in the “*Case Notes*”.

Unknown answering machine / service – NO Message left

Click this link to record that you have reached an answering machine or service, the message does not indicate whether or not you reached the correct household, and you have NOT left a message.

Document that a message was NOT left in the “*Case Notes*.”

PRIVACY SERVICE

Privacy screening services are systems that filter incoming calls from telemarketers and persons or organizations not recognized by the system.

Privacy screening service (correct unit) - message left

When you've reached a household with privacy screening service, and the message verifies it is the correct unit, and have left a message, click this link.

Privacy screening service (correct unit) - NO message left

When you've reached the household with privacy screening service, and the message verifies it is the correct unit, and have NOT left a message, click this link.

Unknown unit with privacy screening - Message left

When you've reached the household with privacy screening service, and the message does not verify it is the correct unit, and have left a message, click this link.

Unknown unit with privacy screening - NO Message left

Click this link if you've reached a household with privacy screening service, and the message does not verify it is the correct unit, and have NOT left a message.

NUMBER CHANGED

New Number Given

If a recorded message has informed you that the number dialed has changed, and the new number is given, enter the new number in the data fields to the right of this link then click "New Number Given" or press enter.

The instrument will go to the "*Dial Retry*" screen. Here you are prompted to redial the original number to make sure you dialed correctly. If you get the same recorded message, click the <[Recorded Message / Privacy Service](#)> link to return to the "Recorded Message" screen. Enter the new number given once more in the data fields, then click the <[New Number Given](#)> link or press enter to exit to the "*Case Notes*" screen.

No Number Given

Click this link if the recorded message indicates that the number dialed has been changed, but no new number is given. You will proceed to '*Dial Retry*'. At '*Dial Retry*', redial the original number. If you receive the message again, re-indicate this by clicking the Recorded Message/Privacy Service link to return to the Recorded Message screen where you will click the <[No Number Given](#)> selection. The case will then go to the "*Case Notes*".

OTHER OUTCOMES

Number not in service

Use this selection to indicate the message stated the phone number was not in service, not working, not assigned or disconnected at this time. WebCATI will proceed to ‘*Dial Retry*’ where you are prompted to redial the number.

In WebCATI, if you get a second Not In Service or Disconnected Message, a new option on the Dial Retry screen allows you to record this on that screen.

NOTE: Be sure to select the option <*Temporarily Not in Service*> rather than <*Number Not in Service*> when the recorded message mentions the number is temporarily out of service. Selecting “*Number Not in Service*” resolves the case and takes it out of the calling queue, while selecting “*Temporarily Not in Service*” will allow the case to be called again.

Normal busy / circuits busy

Sometimes the phone company gives a recorded message that the “line is busy” or “circuits are busy” on the number you dialed. When that occurs, click this link. WebCATI will proceed to “*Case Notes*”.

You may receive this message if the area code for the phone number is incorrect. If based on your knowledge and you know the correct area code, enter the new area code and the phone number and select ‘New Number Given’ instead.

NOTE: WebCATI has a help section link called “Phone Number Lookup”, where you can search for the correct area code by city name and state.

Number could not be completed as dialed

Other examples of messages for which you should select ‘*Number could not be completed as dialed*’ are messages that state, “the customer is not available”, or “party out of range.”

When you use this selection, WebCATI will prompt you to redial the number, and then if the result is the same message, WebCATI will proceed to “*Case Notes*”.

Temporarily not in service

Click this link if the recorded message states that the phone number is temporarily out of service. WebCATI will proceed to “Case Notes”.

Call Problems

Figure E12. Problem With Call - screen

Problem with call	Case ID: 00000055	Status: Never tried (new case)	Respondent: 2:50 PM CDT
TRAINING: cps_cat1	Cntrl #: 01990064999 A63 55	Closeout: 12/31/2007	Page Timer:

CPS00001 Logged in for 29 m 36 s • Show WebCATI Messages Back To... RESPONDENT (555) 222-2222 RICK MARTINEZ 901 RAZORBACKS WAY ANYTOWN KS 99997-997 LANGUAGE • Language - English SPECIAL SKILLS • Skill - No Special Skills CASE DETAILS • Case History Records • Case Notes • Case Phone Numbers • Case Roster • Edit Notes HELP	CALL PROBLEMS 1. Unavailable through Closeout 2. Sample unit not found/unreached/eligibility uncertain 3. Non-Interviews that can recycle 4. Immediate hang-up 5. Refusal 6. Refusal - requests personal visit 7. In scope but currently unavailable 8. Refer to supervisor 9. Language barrier 10. Hearing Barrier 11. Bad connection 12. Wrong number dialed or reached NAVIGATION Back To Dial Outcome
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Problem with call screen

When clicking on < Problem with call the “Dial Outcome,” or “Dial Retry” screens, you are sent to the “Problem with call” screen to record which type of problem you have encountered. There are approximately 20 types of outcomes to select from this screen.

Figure E13. Unavailable Through Closeout – screen



Unavailable through Closeout

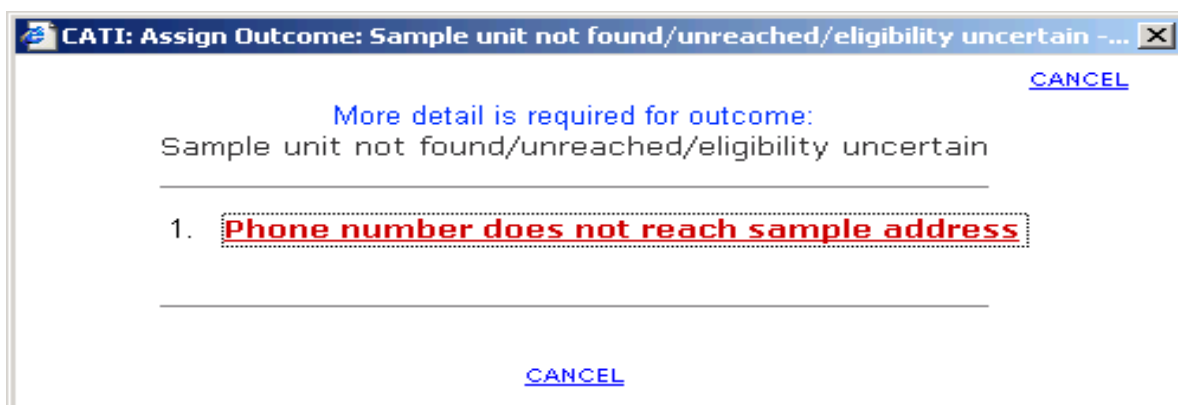
Click this link, for example, if the designated person will not be available to complete the interview prior to the case closeout date. The closeout date for the case is displayed in the blue banner at the top of the page.

After clicking the link, a separate window will appear for you to choose either "[HH – Institutionalized](#)", "[HH – Unavailable through closeout](#)", or "[HH-Moved](#)". Once clicking on the appropriate link the system will continue to the "*Case Notes*" screen.

**Sample Unit not found/
unreached/
eligibility uncertain**

Click on this link if all telephone numbers for the case have been tried, and none of the phone numbers reach the sample address or reach the persons listed on the roster.

Figure E14. Sample Unit Not Found/Unreached/Eligibility Uncertain – screen



**Non-Interview
That Can Recycle**

After clicking the link, a separate window, as displayed below, will appear for you to choose ‘Possible Duplicate’, ‘Not sure if correct sample unit’, ‘Hard of hearing’, or ‘Potential refusal’. WebCATI will then proceed to the “*Case Notes*”.

Figure E15. Non-Interview Recycles – screen



Refusal/Refusal –Requests Personal Visits

If the respondent “refuses” to participate in the interview, click this link. A refusal is coded when the respondent verbally objects to participating in the interview even if the phone number has not been verified.

After clicking the link, a separate window, as displayed below, will appear for you to choose either ‘No confirmation of sample unit.’, ‘Respondent refused - broke off interview and progress made’, or ‘Broke off interview no progress made’.

Once clicking on the appropriate link the system will continue to the “*Provide Reason*” screen where you select (or enter) the reason the respondent refused to participate.

There are two other types of refusals. After clicking the link, a separate window, as displayed below, will appear for you to choose either ‘Request Personal Visit with Progress Made’, or ‘Request Personal Visit without Progress Made’.

Once clicking on the appropriate link the system will continue to the “*Notes*” screen where you enter the reason why the case requires a personal visit.

Figures E16 & E16a. – Refusals – screens

CATI: Assign Outcome: Refusal -- Web Page Dialog

[CANCEL](#)

More detail is required for outcome:
Refusal

1. **Respondent refused/broke off interview and progress made**
2. [Broke off interview no progress made](#)
3. [Hostile breakoff by this respondent without interview progress](#)

[CANCEL](#)

CATI: Assign Outcome: Refusal - requests personal visit -- Web Page Dialog

[CANCEL](#)

More detail is required for outcome:
Refusal - requests personal visit

1. **Requests personal visit with progress made**
2. [Requests personal visit without progress made](#)

[CANCEL](#)

Figure E17. Provide Reason - screen

Provide Reason Case ID: 00000055 Status: Never tried (new case) Respondent: 2:51 PM CDT
 TRAINING: cps_cat1 Cntrl #: 01990064999 A63 55 Closeout: 12/31/2007 Page Timer:

CPS00001
 Logged in for 30 m 38 s
 • [Show WebCATI Messages](#)
 Back To...
RESPONDENT
 (555) 222-2222
 RICK MARTINEZ
 901 RAZORBACKS WAY
 ANYTOWN KS 99997-997
 LANGUAGE

PLEASE SELECT A REASON

Reason: [▼](#)
 - OR -
 Specify other reason:

NAVIGATION

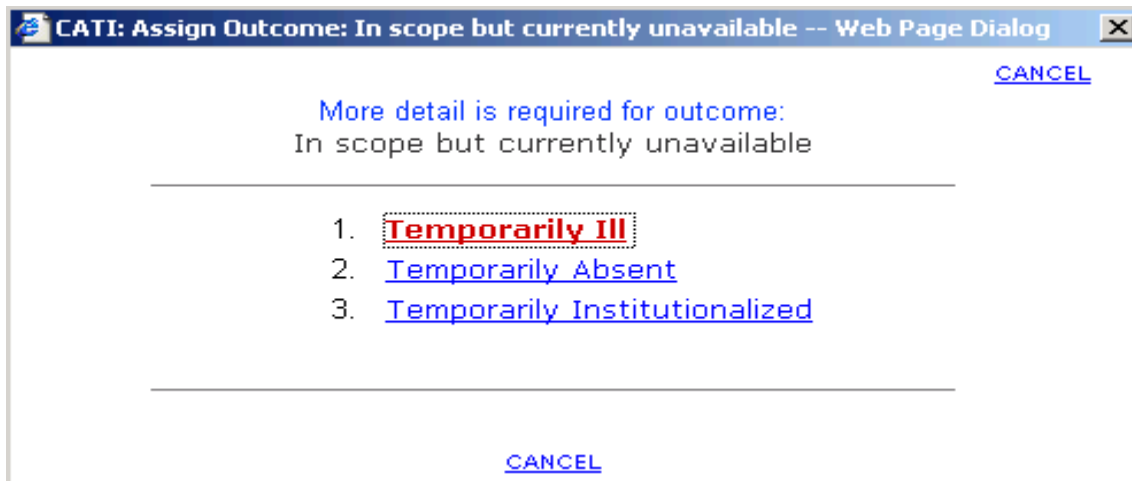
1. [Back To Problem with call](#)
2. [Assign Reason »](#)

In Scope but Currently Unavailable

Click on this link if the designated person is absent but is expected to return before the case closeout date.

After clicking the link a separate window, as displayed below, will appear for you to choose either 'Temporarily Ill', 'Temporarily Absent', or 'Temporarily Institutionalized' .

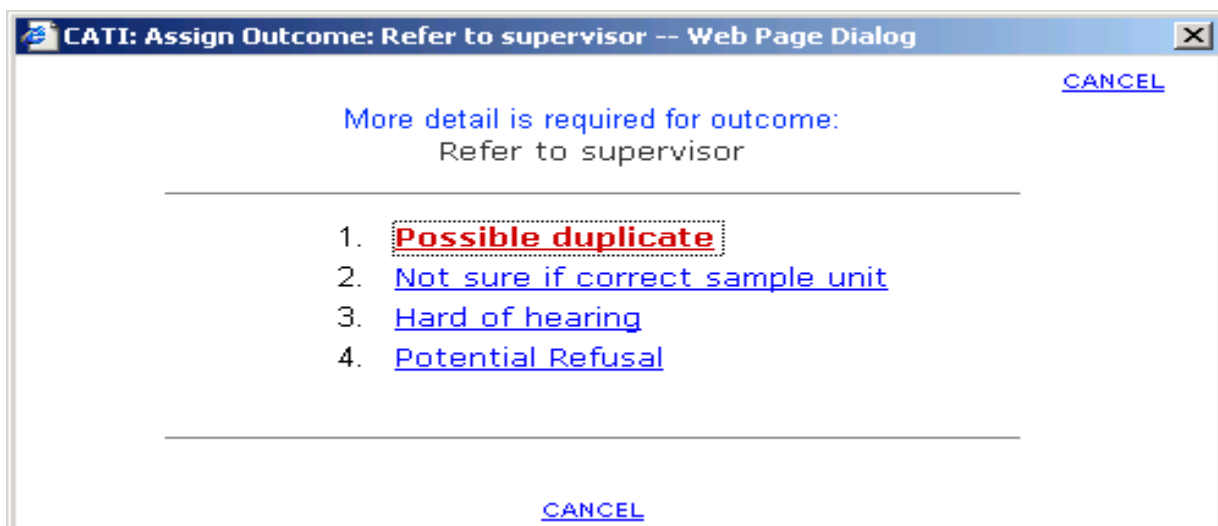
Figure E18. In Scope but Currently Unavailable - screen



Refer to Supervisor

After clicking the link, a separate window, as displayed below, will appear for you to choose 'Possible Duplicate', 'Not sure if correct sample unit', 'Hard of hearing', or 'Potential refusal.' WebCATI will then proceed to the "Case Notes".

Figure E19. Refer to Supervisor - screen



Language barrier

Click this link when the respondent speaks a language other than English, or if he/she seems to not understand English well enough to complete the interview.

As best you can, try probing the respondent to determine which language he/she speaks. Then, click the <[Language barrier](#)> link which will open a separate “*Case Language*” window (see next page).

Choose the appropriate language by clicking in the radio button next to that language. Scroll down if you do not immediately see the necessary language.

If you still can’t find the respondent’s language, click in ‘**Other Language, specify**’ and type in the name of the language.

Conversely, if you do not know the name of the respondent’s language, click in ‘**Unknown Language**’ at the bottom of the language list.

After choosing the language, click on <[Submit](#)> at the bottom of the window. The system will assign the case an outcome and then proceed to the “*Case Notes*” screen.

It is important that we identify the language or determine if someone at the unit speaks fluent English and would be available to translate for the designated person. Including this information in your “*Case Notes*” will greatly facilitate the followup attempts.

Select the category ‘**Unknown Language**’ when you cannot identify what language or language family is spoken by the respondent. This will route the case to interviewers who are designated “General Linguist” in their skills profile. The General Linguist interviewers will attempt to determine what language is spoken by the respondent, and will update the language selection screen once it is identified.

The language family categories “**Asian**” and “**Germanic**” are available if you cannot determine which of the more specific Asian or Germanic languages the respondent speaks. Interviewers designated with the “Asian” or “Germanic” language skill will attempt to determine what language is spoken by the respondent, and must update the language selection screen once the language is identified.

If the language skill assigned the case is designated in the system as an “unsupported language” the case will be put on hold.

Figure E20. Language Barrier - screen

☐ Spanish
☐ Arabic
☐ Asian
· ☐ Chinese
· ☐ Japanese
· ☐ Korean
· ☐ Tagalog
· ☐ Vietnamese
☐ French
☐ Germanic
· ☐ Dutch
· ☐ German
· ☐ Norwegian
· ☐ Swedish
☐ Greek
☐ Italian
☐ Polish
☐ Portuguese
☐ Russian

Hearing Barrier

Click this link if you encounter a respondent who is hard of hearing, or deaf. This case will then go to an interviewer with the hard of hearing skill.

Bad Connection

If you record a bad connection, WebCATI will proceed to ‘Dial Retry’ to allow you to retry the phone number. If on the redial attempt the same results are obtained, indicate a bad connection.

Wrong number dialed or reached

Click this link if it is determined (by yourself or the respondent) that you have dialed the wrong number.