

PART C

**THE CURRENT POPULATION SURVEY
INSTRUMENT**

April 2015

Part C, Chapter 1

Overview of the CPS Instrument

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PART C, CHAPTER 1 OVERVIEW OF THE CPS INSTRUMENT

1.A INTRODUCTION

We refer to the computer software that runs the questionnaire as the instrument. Chapters 3 and 4 cover the middle of the instrument; that is, the demographic questions and the labor force questions.

This chapter describes how the questions are selected for each interview, screen layout, place markers, navigation and the use of special keys, error messages, help screens, and flashcards.

There are instructions for starting the interview program, exiting from a partially completed interview, resuming a partial interview, and exiting a completed interview.

The CPS instrument is broken into three sections known as the front, middle, and back. Chapter 2 deals with the front of the instrument. Chapter 5 describes the back of the instrument, and Chapter 6 is a detailed discussion of noninterviews.

1.B AUTOMATIC SELECTION OF QUESTIONS FOR EACH INTERVIEW

The interviewing program decides which questions to display, based on data input about the address, plus the information you enter about the household members.

For example, the labor force questions are not asked about anyone who is under 15 years of age.

You ask demographic questions the first time you interview a household to determine the composition of the household and the characteristics of its members. In later months, the instrument passes information forward for you to verify and correct if necessary. This is done through dependent interviewing. See Part B, Chapter 4 for a discussion of dependent interviewing.

1.C SCREEN LAYOUT

Throughout the program, each item screen displays the question you will ask. It contains response options (if applicable) and information about what to do next. The computer fills the appropriate proper names, pronouns, verbs, and reference dates into the text of the questions.

Components of a Screen

Most screens in the CPS instrument can be divided into two basic parts:

- The Information (Info) Pane, which includes the question text with possible answer categories (if any), and
- The Form Pane, which includes a summary list of the data items to be collected.

With each question you ask during the interview, you will interact with these two basic screen parts.

You will look at the Info Pane:

- To read the question you must ask (or instruction you must follow).
- To find the appropriate answer in the list of possible answer categories (if any).

You will look at the Form Pane:

- To make the appropriate entry (numeric code or alphabetic characters).

These two basic parts are described in more detail below.

Info Pane

The Info Pane (Figure C1a, page C1-6) is located on the top portion of the screen.

It includes some or all of the following elements:

- Question text in bold black letters
- Interviewer instruction in blue letters (if applicable). A blue diamond identifies the Interviewer instruction.

The Info pane also includes the list of possible answer categories (if any) around the middle portion of the screen. Each option on the list of answer categories has a predetermined numeric code or “precode” to distinguish it from the others. The precode is what you must enter in the Form Pane (described below) to record the respondent’s answer(s). There are some questions that will have a long list of possible answers and that allow you to enter more than one answer. In this instance, you will enter each precode **separated by commas**.

Form Pane

The Form Pane (Figure C1a, page C1-6) is located on the bottom portion of the screen,

and it is where your entries will be recorded in the instrument. The Form Pane provides a summary list of the data items to be collected, and can give you a sense of where you are, and how much ground you must cover to complete a given section. You will sometimes find that a single Form Pane will cover a whole section, in which case the Form Pane will give you a complete list of all the data items you will collect in that section. In most cases, however, you will find that more than one Form Pane is needed to cover a section.

The Form Pane can appear in one of two basic formats:

- In table, or grid, format (Figure C1b, page C1-7) or
- In column format (Figure C1a, page C1-6)

The table format is used when there is sufficient space on the screen to allow Interviewers to collect – on a row-by-row basis – the same set of details for any item listed on the left-most column. In the table format, the instrument will drive you to move – or “navigate” – from left to right. This means that each time you enter an item in the left-most column, the instrument will drive you across that same row – from left to right – to collect more details about that item.

In the column format, the instrument will drive you to navigate from top to bottom for each column that appears in the Form Pane.

Two-level Screen Interaction

Each question or instruction displayed in the Info Pane appears as an item label in the Form Pane, thus allowing space on the bottom half to trace all of the entries you make in a section (or in a subsection, in those cases where the section is so long that it covers more than one Form Pane). The

Info Pane constantly changes as you move item by item. By contrast, the Form Pane remains stationary until you either reach the end of the Form Pane or exit the Form Pane. As you enter answers in the Form Pane, the **layout** of the Form Pane itself will not change, only the **contents** of the Form Pane change as the instrument fills in your entries next to the appropriate item labels.

1.D PLACE MARKERS

Cursor

The cursor is one of several features in the instrument that helps you determine your location. The cursor is what tells you where you are on the screen. It is the blinking vertical line in the Form Pane that marks the precise spot where your entry will be recorded. Always make sure that the cursor is where you want it **before** you start keying. Otherwise, you could key the answer in the wrong place, and you could even over-write some of your previous entries.

Case ID

The first label on the bottom margin of the Form Pane, also referred to as the status bar (Figure C1a, page C1-6), is the Case ID. This tells you which case (of all the CPS cases on your computer) you are interviewing. Along with the screen name (described below), the Case ID is a useful place marker to give whenever you report any instrument questions or problems to your regional office.

Screen Name

The screen name is what is used to identify each question. The screen name is the second label on the status bar (Figure C1a). Each data entry point in the Form Pane has a corresponding screen name, which is unique throughout the instrument (unlike the column headings and other item labels in the Form Pane which are not unique). Since

each screen name is unique (no two data entry points will have the same screen name), the screen name is the one place marker you should always include whenever you have to describe your location in the instrument.

This is especially true when you need to report any instrument problems to your regional office. When reporting problems, make sure you use the screen name located on the status bar (e.g., IO1INT in Figure C1a). **Do not** use the item label preceding the cursor in a Form Pane with column formatting (e.g., “Employed” in Figure C1a) nor the column heading in a Form Pane with table formatting (e.g., “Name” in Figure C1b, page C1-7).

Interview Number

The interview number is the fifth label on the status bar (Figure C1a). This number tells you if you are conducting a first-time interview (month in sample 1) or if you are interviewing a continuing case (month in sample 2-8).

Respondent Name

The respondent name is the sixth label on the status bar (Figure C1a). It is there to remind you with whom you are speaking, in case you change respondents in the middle of the interview.

Text Color and Shading

The text of the questions, the Interviewer instructions, and the answer categories in the instrument may appear in different colors and shading. The instrument uses the text’s color and shading as an *instruction* (telling you *how to react* to the text), or as a *place marker* (telling you *where you are* on the screen). For example, whenever you see the bright blue text of an Interviewer instruction, you know that you are **not** supposed to read it to the respondent. Likewise, whenever you see an item label highlighted in blue in the Form Pane, you

know that this is where your cursor is located. Below are other examples of how the instrument uses text color and shading:

Bold black text in the Info Pane

This indicates question text that must be read to the respondent (Figure C1a).

Regular black text in the Info Pane

This indicates answer categories that you should **not** read to the respondent

(Figure C1a). In the event that answer categories should be read, an Interviewer instruction will indicate so.

Grayed out text in the Info Pane

This indicates optional text and it is not required that you read this to the respondent (Figure C1c).

Bright blue text in the Info Pane

This indicates that the text is an instruction for you to follow and it should **not** be read to the respondent (Figure C1b) unless an Interviewer instruction tells you to do so.

Figure C1a. Screen Illustration (Column Format)

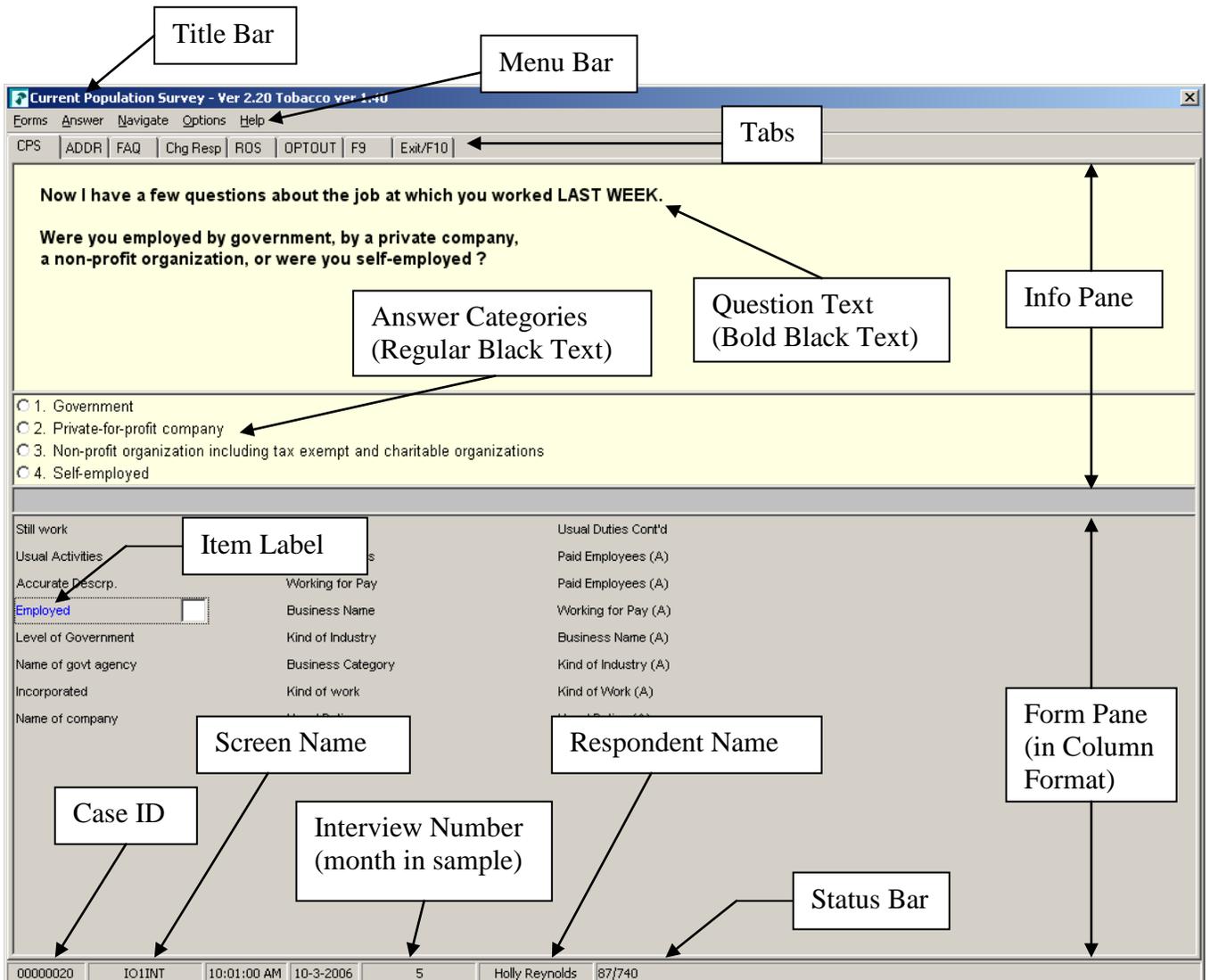


Figure C1b. Screen Illustration (Table, or Grid, Format)

Question Text (Bold Black Text)
What is Holly Reynolds's date of birth?

Interviewer Instruction (Bright Blue Text)
 ♦ Enter Birth Month

Answer Categories (Regular Black Text)

- 1. January
- 2. February
- 3. March
- 4. April
- 5. May
- 6. June
- 7. July
- 8. August
- 9. September
- 10. October
- 11. November
- 12. December

Name	Rel	Sex	Sub fam	Who	Mom	MTYP	Dad	DTYP	Par2	B-Mon	Day	Year	Ver	Age	Age gss	Age	<15
[1] Holly Reynolds	Ref per	2			0		0			6	12	1949	1			57	
[2] Thomas Reynolds	Spouse	1			0		0			1	1	1950	1			56	
[3] Maureen Griffin	Child	2			1	1	2	1		4	26	1969	1			37	
[4] Ricky Griffin	Grandchild	1			3	1	0			4	10	1998	1			8	
[5] Sherry Griffin	Grandchild	2			3	1	0			2	10	2001	1			5	

Column Label

Form Pane (in Table Format)

00000020 BIRTHM 1:41:18 PM 9-27-2006 5 Thomas Reynolds 53/772

Figure C1c. Screen Illustration (Grayed out ext)

Question Text (Bold Black Text)
What kind of business or industry is this?

Interviewer Instruction (Bright Blue Text)
 ♦ Read if necessary: What do they make or do where you work?

Optional Text (Grayed-out Text)
 ♦ The Industry Reported Last Month Was RETAIL LUMBER STORE.

1.E METHODS OF MAKING ENTRIES

For most items, you make an entry by either entering a number or letter in the Form Pane, or by using your mouse to select the radio button or checkbox next to the precode in the Info Pane. For a few of the questions, you type several words, such as the name of the respondent's employer or his/her job title or tasks.

Frequently, the instrument displays a list of options as illustrated in Figure C2a. You select a number from this list and press the corresponding key, unless the respondent does not know the answer or refuses to give an answer.

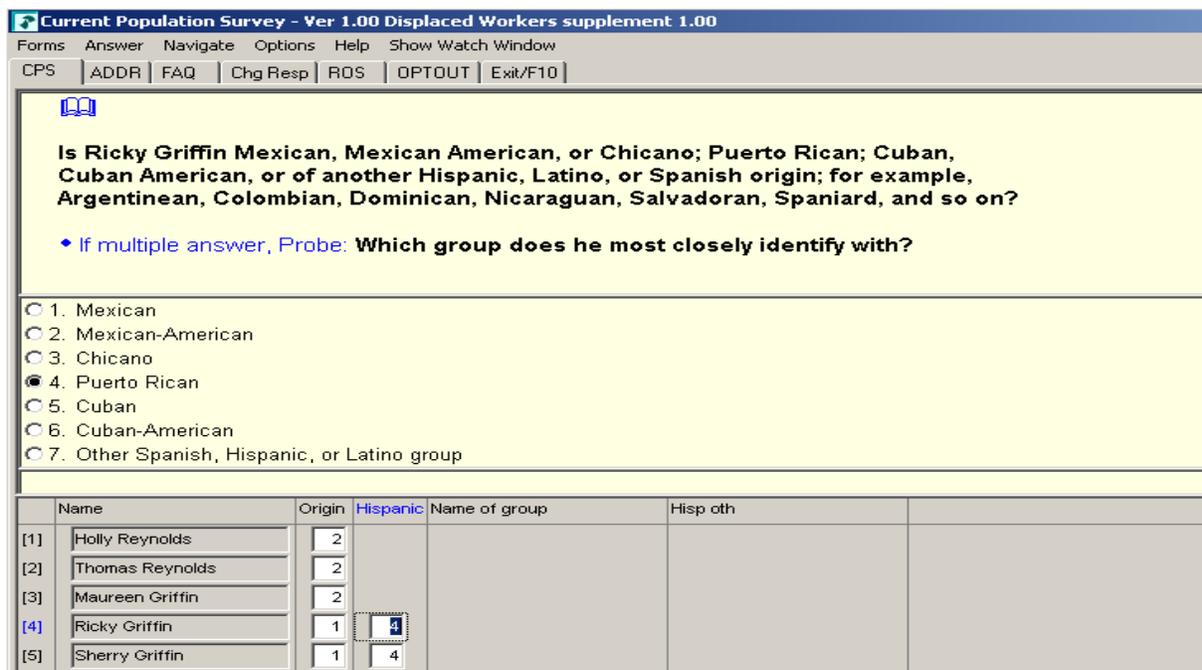
If the respondent does not know the answer for a certain item, try to obtain an estimate

by neutral probing. If you cannot, then **press Ctrl D for “don't know.”** The  symbol will appear in the Form Pane to confirm the **“don't know”** entry.

Information to fill a **“don't know”** item sometimes turns up later in the interview (for example, the person who knows the answer may come home from work). In this case, you may be able to use the function keys to skip back to the item(s) and replace the **“don't know”** with a better answer. Pressing **Ctrl M** will allow you to view which entries currently have a **“don't know”** or **“refused”** response.

If the respondent declines to answer a certain question despite your persuasive efforts, **press Ctrl R for “refused.”** The  symbol will appear in the Form Pane to confirm the **“refused”** entry.

Figure C2a. ORISPN, Main Item in Origin Series



Current Population Survey - Ver 1.00 Displaced Workers supplement 1.00

Forms Answer Navigate Options Help Show Watch Window

CPS ADDR FAQ Chg Resp ROS OPTOUT Exit/F10

Is Ricky Griffin Mexican, Mexican American, or Chicano; Puerto Rican; Cuban, Cuban American, or of another Hispanic, Latino, or Spanish origin; for example, Argentinean, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard, and so on?

◆ If multiple answer, Probe: Which group does he most closely identify with?

1. Mexican
 2. Mexican-American
 3. Chicano
 4. Puerto Rican
 5. Cuban
 6. Cuban-American
 7. Other Spanish, Hispanic, or Latino group

	Name	Origin	Hispanic	Name of group	Hisp oth
[1]	Holly Reynolds	2			
[2]	Thomas Reynolds	2			
[3]	Maureen Griffin	2			
[4]	Ricky Griffin	1			
[5]	Sherry Griffin	1	4		

NOTE: You can enter **Ctrl D** or **Ctrl R** for most items. They are not always displayed on the screen as options because they are only for situations where you cannot get a valid answer.

If you enter an unacceptable response, a dialog box will appear on the screen showing an error message telling you that your entry was “invalid.” This happens, for example, if you enter “3” when the only options shown on the screen are “1” for yes and “2” for no. When the computer message appears, press ENTER or click “OK” and then type the correct entry.

Most items cannot be left blank. If you press ENTER without first typing a

response, the instrument prompts you to enter a valid response by either displaying the message “Item cannot be left blank” or by remaining on the item that requires an entry. Type a valid response, then press ENTER.

When there is a long list of options (such as ethnic origin or income level), hand your job aid (flash card) booklet to the respondent. Ask him/her to tell you the number of the correct response.

When an open-ended question appears, type the answer, followed by ENTER. If there is a second blank line, press ENTER when you have no more information to type. Figure C2b illustrates a screen of this type.

Figure C2b. IO1DT2, Sample Screen With Open-Ended Question

Current Population Survey - Ver 2.20 Tobacco ver 1.40

Forms Answer Navigate Options Help

CPS ADDR FAQ Chg Resp RDS OPTOUT F9 Exit/F10

What are your usual activities or duties at this job?
For example: typing, keeping account books, filing, selling cars, operating printing press, laying brick.

Enter a text of at most 50 characters

Still work	Self-employed	Usual Duties Cont'd	
Usual Activities	Paid employees	Paid Employees (A)	
Accurate Descrip.	Working for Pay	Paid Employees (A)	
Employed	Business Name	Working for Pay (A)	
Level of Government	Kind of Industry	Business Name (A)	Construction
Name of govt agency	Business Category	Kind of Industry (A)	4
Incorporated	Kind of work	Kind of Work (A)	Foreman
Name of company	Usual Duties	Usual Duties (A)	Supervising C

Try to enter all the necessary information, without abbreviating, at the time of the interview. Once you have made an entry for every question and exited from the program, the interview is complete. You cannot go back into the program and edit the answers. (You can go back into partially completed interviews, however, as described in section 1.K of this chapter.)

The data entry fields for numeric items such as telephone number are set up with appropriate dashes and parentheses, as illustrated in the TELPHN screen, Figure C2c. In these fields, type only the digits, not the punctuation. The cursor skips automatically to the next space that you will fill with a digit.

Figure C2c. TELPHN, Numeric Entry With Punctuation Filled in Advance

The screenshot shows a software window titled "Current Population Survey - Ver 2.20 Tobacco ver 1.40". The menu bar includes "Forms", "Answer", "Navigate", "Options", and "Help". A navigation bar at the top contains buttons for "CPS", "ADDR", "FAQ", "Chg Resp", "ROS", "OPTOUT", "F9", and "Exit/F10".

The main content area has a yellow background and contains the question: "What is the telephone number of the phone where you would like to be called?". Below the question are three bullet points:

- Current telephone number:
- Record new number
- Enter 0 for no telephone number

At the bottom of the screen, there are several input fields:

- "Is there a telephone?" with a dropdown menu showing "1".
- "Where phone located" with a dropdown menu showing "1".
- "What is telephone" with a text input field containing "() - x " and a cursor.
- "Type of phone service" with a dropdown menu showing "3".
- "Phone interview ok?" with a dropdown menu showing "1".
- "Home/Office/Cell" with an empty checkbox.
- "Phone available?" with an empty checkbox.

1.F NAVIGATION AND USE OF SPECIAL KEYS

1.F.1 Navigating in the instrument

There are many different ways to navigate in the instrument using either the mouse or the keyboard. Because the use of the mouse is very intuitive (that is, you can easily guess where you should point and click in order to get somewhere or to enter something), this manual and any CPS instrument training you receive will focus mainly on how to navigate and enter data through the use of the keyboard.

Mouse or Keyboard - You can use only the keyboard, or only the mouse that is embedded in your laptop (immediately below the keyboard), or you can use both – going back and forth between the two – to navigate through the instrument or to make data entries.

Arrow Keys - You will use the arrow keys mostly when navigating sequentially from one item to the next. Use your Left and Right Arrows to navigate horizontally and your Up and Down Arrows to navigate vertically (Figure C3 on page C1-12).

Page Up/Page Down Keys - You will use the Page Up and Page Down keys when navigating sequentially from one Form Pane to the next (Figure C3). Note that you cannot page down to the next Form Pane until you have completed the Form Pane where your cursor is located. You may also have to readjust your cursor when you page down or page up to a new Form Pane, because the instrument always places you on the first item of the Form Pane.

END Key – You will use the END key to quickly move to the next unanswered question.

Tabs - There are a series of tabs located above the Info Pane (Figure C1a). Each tab

directs you to a different screen in the instrument, allowing you to quickly view additional information or take a specific action:

CPS = exit any tab and return to the interview

ADDR = view the address and current phone number for the household

FAQ = access the answer to a frequently asked question that your respondent may be asking (e.g., What is this survey all about? Who uses this information? Is this survey authorized by law?)

Chg Resp = change the respondent

ROS = view the household roster

OPTOUT = (used in February/March/April ONLY) identify individuals who wish to opt out of having their data from the ASEC supplement linked to administrative records (a more detailed discussion on the use of this feature is included in the yearly refresher training and ASEC materials)

F9 = skip over a person in the household in Basic CPS

CTRL_F9 = skip over a person in the household in a supplement

Exit/F10 = exit the interview and go to the screens where you can schedule an appointment

1.F.2 Special Keys

These keys allow you to do special things or do things more quickly during an interview. For example, you can back up to a previous screen to correct an entry or add notes to explain an unusual response. The operation of each special key is described in Table C1 (see page C1-13 and C1-14) and also summarized in your computer templates.

Figure C3. Sample Keyboard Illustration

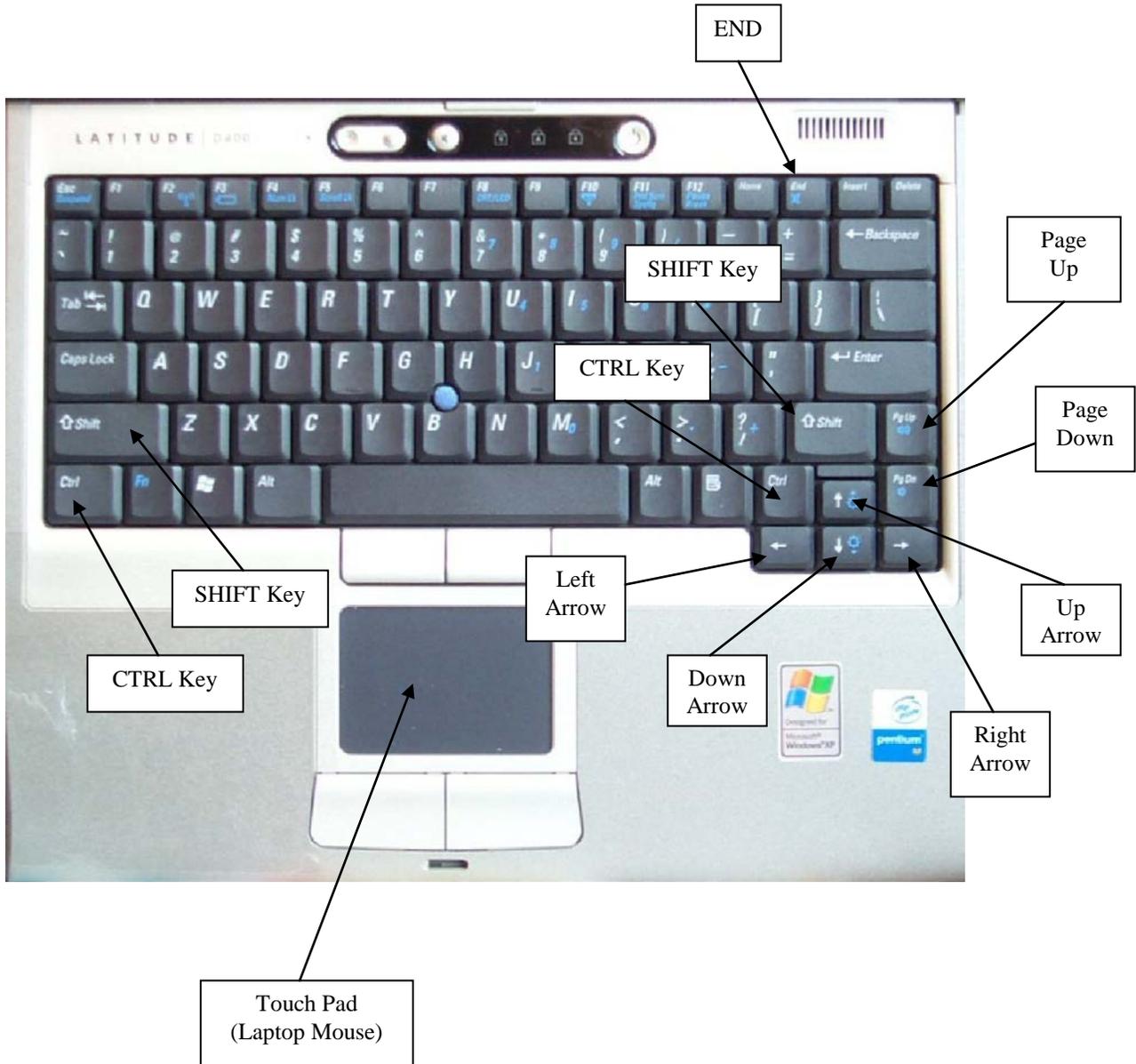


Table C1. Function Keys and Special Keys

Key/Key Stroke	Action	Description
F1	Question Help	Shows help for the current question.
Shift-F1	Show HH	Shows the household roster.
Ctrl-F1	Opt Out	Shows the OPTOUT screen. (Used in February, March, and April only)
Shift-F2	FAQs	Shows the help screen for Frequently Asked Questions (FAQs).
Ctrl-F3	Show Question Text	Shows question text.
F4	Menu for Section Tabs	Allows you quick access to the Section Tabs, which access certain sections of the instrument.
Shift-F4	Show HH Address	Shows the Household address.
Shift-F5	Language	Allows you to switch to the Spanish version of the questions. When you select Spanish, the current question and every question thereafter will be displayed in Spanish. Press Shift-F5 again and select English to return to the English version.
F7	Item Notes/Remarks	Permits you to enter notes for specific items within the instrument.
Shift-F7	Show Notes/Remarks	Permits you to view the notes you have previously entered for an item. If notes exist for a particular item, a paperclip symbol will appear next to the item label in the Form Pane. Press Shift-F7 to view the notes. These notes are item-level notes and do not allow you to access the case-level notes that are entered elsewhere and viewed differently.
Ctrl-F7	Case Level Notes	Calls the Case Level Notes editor.
F8	Return	Returns you to the place where a skip was initiated.
F9	Skip to Next Person	Skips over the current or next person in the roster to get to someone else listed further down in the roster while in Basic CPS.
Shift-F9	Change Respondent	Permits you to change the respondent.
Ctrl-F9	Supplement Skip Person	Skips over the current or next person in the roster to get to someone else listed further down in the roster while in a supplement.

Table C1. Function Keys and Special Keys (continued)

Key/Key Stroke	Action	Description
F10	Exit	Use to exit when the respondent breaks off the interview before you can complete the interview. The program goes forward to the screens where you can schedule a callback. The instrument sets the interview status to " partially completed " so that you can resume it later when the respondent is available.
Shift-F10	Show Function Keys	Permits you to view a help screen with the definition of all available function keys.
F11	Calculator	Opens the calculator.
F12	Copy Down	Copies the entry from the field above.
Ctrl-D	Don't Know	Enters a response of "Don't Know."
Ctrl-H	Blaise Info	Shows Blaise version information.
Ctrl-M	Show Don't Know and Refused	Search/View all items with a response of "Don't Know" or "Refused."
Ctrl-R	Refused	Enters a response of "Refused."
Ctrl-T	Interviewer Time Preference Screen	Allows you to use boosts and blocks to select the best or worst time to call or visit a household for the next month's interview (not for a callback this month).
END	Next Unanswered	Moves to the next unfilled/unanswered question.
>	Up arrow key	Backs up (upward) to the previous item or field.
?	Down arrow key	Moves forward (downward) to the next item or field, where permitted. You cannot move forward past an unfilled item.
=	Left arrow key	Backs up (leftward) to the previous item or previous field.
<	Right arrow key	Moves forward (rightward) to the next item or field, where permitted. You cannot move forward past an unfilled item.

1.G ERROR MESSAGES

Whenever you do something that is not allowed, the instrument will alert you by displaying an error message.

There are two basic types of error messages:

- Hard error messages, and
- Soft error messages

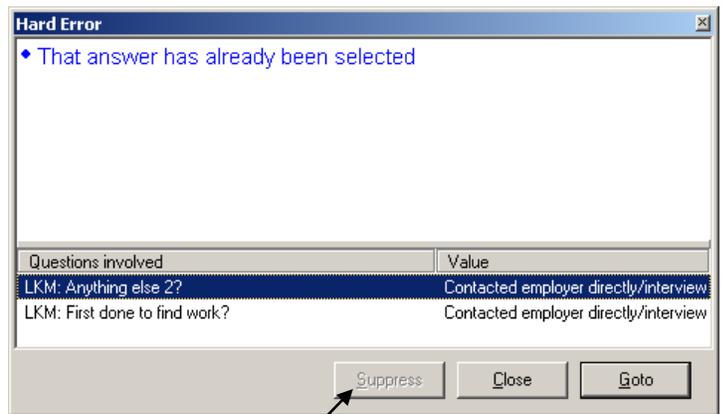
Hard Errors

“Hard” errors are those which you must correct before the instrument will allow you to move on. A hard error message, therefore, will never give you the option to suppress (or ignore) the entry that is supposedly in error (Figure C4a). However, it will allow you to enter “G” to “Go to” the problem entry(ies) so that you can make the correction.

Soft Errors

“Soft” errors are those which you do not need to resolve before you can move on. A soft error message, therefore, will always allow you to enter “S” to “Suppress” the entry that is supposedly in error (Figure C4b). It also gives you the option to “Go to” the problem entry(ies) and make the correction.

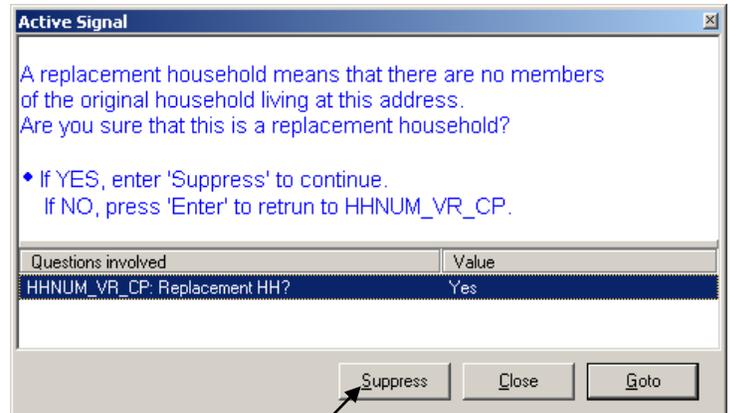
Figure C4a. Hard Error Message



Inactive
“Suppress”
button

You are **not** allowed to “suppress” the invalid response.

Figure C4b. Soft Error Message



Active
“Suppress”
button

You are allowed to “suppress” the invalid response.

1.H HELP SCREENS

There are several screens in the instrument for which you can access a separate “Help” screen that contains additional information. If a help screen is available for the current screen, this will be indicated by “?[F1]” in bright blue text at the top of the Info Pane. To get to the Help screen, you press F1 at the screen where “?[F1]” appears.

1.I FLASHCARD/ INFORMATION BOOKLET

Occasionally, flashcards are used with certain screens. When a flashcard is used with a screen, you will see a bright blue book icon (📖) located at the top of the Info Pane (as shown in Figure C2a on page C1-8). This indicates that you should show the flashcard to the respondent. In the event that the flashcard is to be read to the respondent, you will see an Interviewer instruction in the Info Pane.

1.J STARTING THE INTERVIEW PROGRAM

When you are ready to go to the door of a household for a personal visit, or dial the household for a telephone interview, it is time to start up the interview program.

1.J.1 Entering Case Management

There are a number of ways to enter Case Management.

Using the Mouse

- Move the mouse arrow onto the CPS (Windows) icon on your desktop and double-click the left mouse button or Touch Pad button. **OR**

- Move the mouse arrow onto the Start button and single-click the left mouse button or Touch Pad button and a menu will appear. Move the mouse over “Programs” and a second menu will appear. Highlight CPS (Windows) and click the left mouse button or Touch Pad button, or tap the touch pad. **OR**

Using the Keyboard

- Press the Windows key on your laptop and a menu will appear. Press “P” for Programs and a second menu will appear. Arrow down to CPS (Windows) and press ENTER.

Once the program opens, click on the Case Management Window to make it active and press ESC to bypass ALMI and go directly into Case Management. Once you’re in Case Management you will see that the screen is divided into two parts. The upper half of the screen is your **Case List pane**, while the lower half of the screen is your **Details pane**. You will also see Menus and Tool Bar Icons/Function Keys along the top of the screen.

1.J.2 Menus

Menus are located along the top of your screen and are labeled:

File Edit View Actions Help

In Windows Case Management there will be some things that can only be accomplished through the use of the menus (i.e. no function key). All actions that may be performed with a function or shortcut key may also be performed through menus.

To access a menu, press the ALT key and the one underlined letter of the menu you want displayed. To make the selection, either use the arrow keys to highlight your

selection and press ENTER or press the underlined key.

NOTE: You may also use your mouse to point and click on menus and sub-menu options instead of using the keyboard.

1.J.3 Tool Bar Icons/Function Keys

Tool Bar icons are the buttons located below the menus with the function key labels. These are here mostly as a reminder of what the function keys do.

F1 – Help: Displays the Help information about the active window.

F2 – Interview: Initiates an interview for the selected case. If you selected the correct case, click “OK” or press ENTER. If you selected the wrong case, click “Cancel” or highlight “Cancel” using the “TAB” key and press ENTER.

F3 – Next Tab: Controls the display in the Details Pane by moving you from tab to tab.

F4 – Details/Case List: Toggles the active window between the Details Pane and the Case List Pane.

Shift-F4 – Show Calendar: You can press Shift-F4 to use the calendar function or select “Show Calendar” from the View Menu. Case Management will display a calendar for the current month with the current date outlined. If you want to look at the next month or previous month, click the arrowhead in the upper-left or upper-right corner. This is a reference tool only and will not insert a date into any Case Management field. [This function key will not be displayed on the Tool Bar.]

F5 – Reports: Lists reports available for display. Select the report you would like to display with either the mouse or arrow keys, and select “OK” or press ENTER. You can

see either your count of cases or your current response rate for the interview period.

Shift F6 – Map: Opens the ALMI Map.

F7 – Notes: Displays the Case-Level Notes Editor where you can enter a note for the selected case or edit a previously entered note. Case Management and the CPS Instrument will use the same application for editing case level notes. Notes entered in Case Management are displayed in the survey instrument and notes entered in the instrument can be viewed in Case Management. The Notes application will automatically fill in a CAPI indicator - the time, date, and your Interviewer code - so that notes can be easily traced if a case is transferred to another Interviewer. Press “F10” to exit the Notes application. If you entered a note, select “Yes” and press ENTER to save the note.

F8 – View: Displays options for a variety of ways you can look at your cases on the Case List pane. The display categories are:

- All
- Not Started
- Open
- Partial
- Interviewed
- Type A
- Type B
- Type C
- CATI
- Deleted
- Missing Data
- Observed
- Transmitted
- Received in HQ

When you select an option, the program will list only the cases that match your criteria. The display will be just like the main display, but with a label to identify which

set of cases you selected. Use “F8” again to select a different category. Use “Shift-F8” to return to the main display.

F9 – Sort: Allows you to sort your cases by multiple fields of your own choosing. To add a column to the sort, highlight that column in the “Columns Available for Sorting” pane on the left and press CTRL-S to move that column to the “Sort Column” pane. To remove a column from the “Sort Column” pane, highlight it and press CTRL-S again. Cases will be sorted first by the top category, then the second category from the top, and so on. The last sort will be the bottom category. You may select as many columns as you like.

F10 – Exit: Exits Case Management and returns to the Windows Desktop. When you are done working with Case Management ALWAYS click this button to quit and save your work.

Ctrl T – ITP: Opens the Interview Time Preferences screen which allows you to select the best or worst time to call or visit a household for the **next month’s** interview (**not** for a callback this month).

1.J.4 Case List Pane

The Case List Pane, located on the upper half of your screen, shows the list of cases you still have to complete.

The Case List Pane contains the following columns:

- **Control Number:** There are two control numbers this year. The first consists of the PSU, Segment, Segment Suffix, Sample Designation, Sample Designation Suffix, Serial and Serial Suffix numbers.

For Example, Control Number 01990264999 A75 01A can be broken

down into the following parts:

Survey ID: 01
PSU: 99026
Segment: 4999
Segment Suffix:
Sample Designation: A75
Sample Designation Suffix:
Serial: 01
Serial Suffix: A

Please note that not all Control Numbers will contain the Segment Suffix and Serial Suffix numbers.

- **2010 Control Number:** Some cases will have a different Control Number. These are the 2010 Sample Design cases.

These Control Numbers consist of the Survey Code, PSU, Frame, Sample Designation, Sequence Number, and Time of Interview.

For example, Control Number 0199006UA64000101M can be broken down into the following parts:

Survey Code: 01
PSU: 99006
Frame: U
Sample Designation: A64
Sequence Number: 000101
Time of Interview: M

Please note that not all Control Numbers will contain Time of Interview. “M” is used to indicate March Hispanic cases.

- **Address:** House number, house number suffix, street name, unit designation, and physical description. There is a space between each field. If truncated, a ‘~’ should appear in the last space to indicate a continuation. [Note: If house number, house number suffix, and street name are blank, then the physical description will be displayed.]

- **Place Name/City**
- **Zip**
- **Appointment:** This field will be filled with an appointment time to contact a household, if you entered a callback appointment.
- **P/T:** Personal visit or telephone interview. P = Month in Sample 1 and 5, or no telephone number. T = Month in Sample 2-4 and 6-8, with a telephone number.
- **Status:** Displays interview status codes.
- **Telephone Number**
- **Interview Number:** Month-in-sample 1-8. This is used to determine if persons are eligible for certain questions, such as the earnings questions. During the interview your computer will make this determination for you.
- **Rte:** Route allows you to enter the order in which you plan to visit your cases. You can then click the column header to sort your cases (or use F9) so that they are displayed in the order you want to work that day.

1.J.5 Details Pane

The Details Pane is the area at the bottom half of the screen. The information displayed in the Details Pane corresponds to whichever case is highlighted in the Case List Pane. The Details Pane contains seven different tabs, each of which contains additional information about the case. If you are in the Details Pane, the title will be red. The F3 key can be used to change the tab that is displayed. Fields with a white background may be edited. Use Ctrl-S to save any changes.

The Details Pane contains the following

tabs:

- **Assignment:** This is the main tab and it contains information about the home address, separate mailing addresses, control number, Case ID, Interview Number, Respondent Name, appointments, and other items.
- **HH Roster:** This tab displays the household roster. The roster is updated when you exit the instrument. You cannot update the roster while in Case Management; you are only allowed to view this information.
- **Additional Information:** This tab contains additional information related to group quarters.
- **Notes:** This tab allows you to view case-level notes. If there are notes to view, a red checkmark will appear in the tab.
- **Contacts:** This tab lists contact information obtained for Type Bs and Cs.
- **Letter Mgmt:** This tab allows you to request a letter to be sent to the respondent. The lower portion of this tab is “Letter History” and displays previously sent letters.
- **History:** This tab contains the history of all previous visits for a case. It also keeps a record of all the times the case has been accessed in the current month.
- **Contact History:** This tab displays details of contact attempts for the CURRENT interviewing period.
- **Returning Contact History:** This tab displays details of contact attempts for PREVIOUS interviewing periods.

- **Interview Time Preferences:** This tab allows you to view information on the best or worst time to contact a household. In order to make changes, you must use the **Ctrl T** function key.
- **Bldg Mgmt:** This tab displays contact information for companies or individuals affiliated with the sample address. Here you will find contact information for people who can assist you in gaining access to the sample unit.

1.J.6 Selecting a Case

In the Case List Pane, highlight the case you intend to interview and press the F2 key. A dialog box will appear, asking you to confirm your selection. Press ENTER or click OK to confirm that this is the case you want to interview. In the next few seconds, messages flash by on the screen while the computer prepares for the interview. These are not important to you unless something goes wrong and the first screen of the questionnaire (the "START" screen) does not appear. If that happens, write down what remains on the screen when this initial processing stops (for example "case could not be found in STATUS file"). If you are not able to restart the interview, report the message(s) to your RO.

Typically, the first screen of the questionnaire appears within a few seconds and the computer is ready for you to proceed with the interview.

1.K EXITING FROM A PARTIALLY COMPLETED INTERVIEW

At times, you will have to exit from the instrument even though you have only partially completed the interview. This happens, for example, when a respondent

breaks off the interview for personal reasons, with or without an offer to continue later.

You may either press the F10 key or select the Exit/F10 tab to exit from an unfinished interview.

NOTE: Do not try to exit from the interview by shutting off the computer. If you do so, the partial information that you have collected so far will be lost. Furthermore, your Case Management file will not be updated properly. This will prevent you from going back into this case to complete the interview.

The concluding screens prompt you to make an appointment for a callback or a return visit to obtain the remaining information. If more convenient for the respondent, a telephone callback is acceptable to complete a first or fifth month interview that you began as a personal visit.

Partially completed cases where no labor force information has been collected, continue to appear on your Case Management main display so you can select the case and resume the interview. These "insufficient partials" will remain on your laptop. They will **NOT** be transmitted with your final transmission unless you have completed the case, completed enough of the case to make it a "sufficient partial," or entered the case as a Type A noninterview.

1.L COMPLETING A PARTIAL INTERVIEW

When you make your return visit or telephone call for a partially completed interview, highlight the address on your Case Management main display and press F2 to run the interview program. The instrument displays reminder information

about the case before you begin collecting data for the remaining items. The computer presents appropriate lead-in remarks for you to use in resuming the conversation with the respondent. For example, "Some of the questions have already been answered; let me see where we should begin." The interview continues with the next unanswered question. For further review of previous responses, use the arrow keys to back up one screen at a time or use F4 to jump back to a previous screen.

When you complete the interview, the instrument places the interview files with the rest of your completed work. It is then included in your next transmission. Do your best to complete all partial interviews. If you discover that you cannot get more information from a household by closeout time, you can make the case a Type Z - sufficient partial, if part of the labor force information has been collected.

From your Case Management main display, highlight the case record and press F2 to begin the interview program.

On the START_CP item screen, select precode 5, "Ready to transmit case – no more follow-up." This will bring up the Type Z information screen shown in Figure C5. For each person 15 years of age and older where the labor force items have not been answered, you will be asked to enter the reason that best describes why the survey data were not collected. After answering the Type Z question for each person, the case will be removed from the laptop and transmitted to HQ with your next transmission. Make this selection **only** if you are certain that you cannot get any more information.

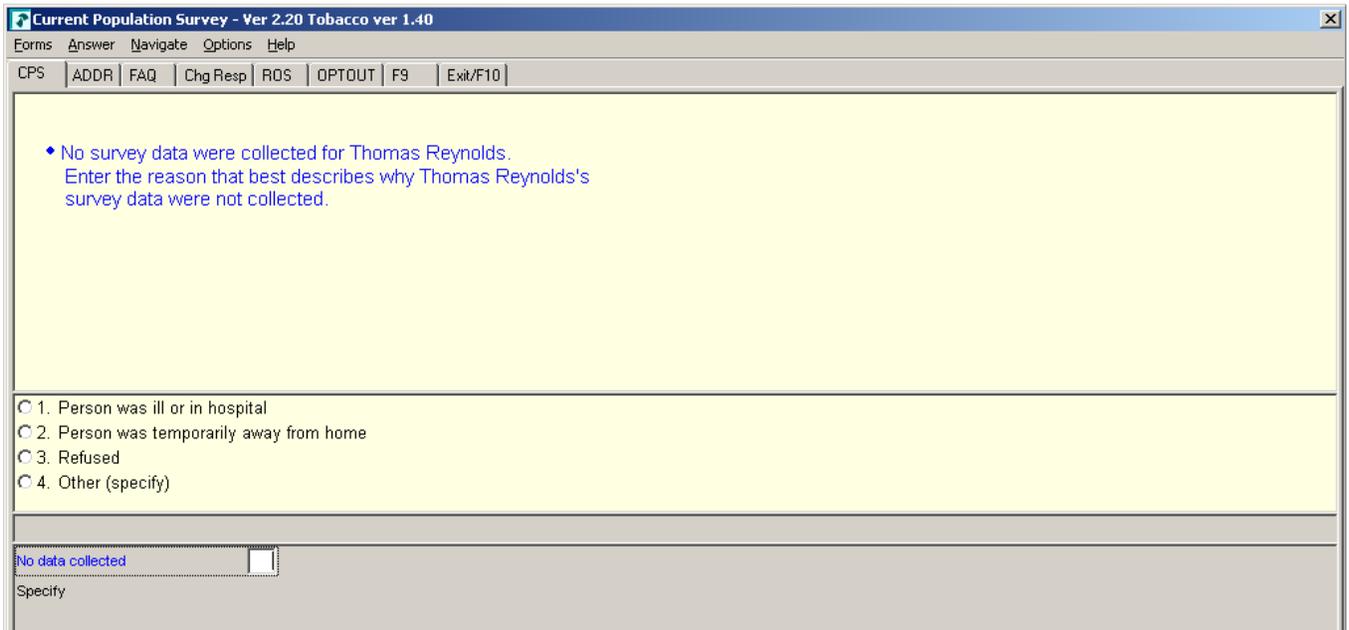
1.M EXITING FROM A COMPLETED INTERVIEW

When you have answered all questions, the computer exits the instrument, updates the Case Management file, and returns you to the main Case Management screen. When you exit, the program also assesses the completion status of the case. The computer moves the data files for completed cases to the directory where they can be sent to HQ during your next transmission.

It then deletes completed cases from your Case Management main display. If necessary, you can still view Case Management records and add notes by using the Case Management View function (F8 function key) and selecting the "Interviewed" display category.

You cannot reenter the instrument and make changes to the data after you have completed a case. You can re-enter a case to change the notes only.

Figure C5. Example of Type Z Item Screen



1.N PROGRAM ERROR RECOVERY

Occasionally a problem in the computer program may prevent the interview from continuing in a normal way. The following types of problems may occur:

Work area not in use: DGBGOBOTTOM Error Message.

If you see the error message:

<p>ERROR DBCMD/2001 Work area not in use: DGBGOBOTTOM Quit Default</p>

or the message:

<p>Error BASE/1002 Alias does not exist: <various> Quit Retry</p>
--

or the message:

<p>Another version of Case Management - <survey> is already running. OK</p>

it means that you tried to open a survey that is already open. Press ENTER to select Quit or OK, and then look on the Task Bar (at the bottom of the screen) for the name of the survey you want to open. Single-click that name to bring up the survey, or press the Alt key and the Tab key simultaneously until your survey appears.

A Program Stops Responding

If you are working with a program and suddenly all operations freeze, the program has probably stopped responding. You can exit the failed program without shutting down the laptop.

To close a program that has stopped responding:

1. Press Ctrl-Alt-Del once. The Entrust Security dialog box appears. Select the **Task Manager** option by typing **T** or clicking the **Task Manager** button. The Windows **Task Manager** appears. Click on the applications tab to get a list of all the programs and processes currently in

operation.

If a program has stopped responding, the words “not responding” appear beside its name in the list. Do not continue on to Step 2 unless the status is **Not Responding**.

2. Use the up or down arrow key to select the program you want to close.
3. Press the **Tab** key until the **End Task** button has a dotted line around it, and then press **Enter** (or single click the **End Task** button), then select **End Now**. Closing the failed program should allow you to continue working in other programs. If it does not, continue with Step 4.
4. Close the remaining open programs.
5. Press the **Esc** key to exit the Task Manager.
6. If the system is still not responding, shut down the laptop and start it up again.

When you reboot the computer, the information collected so far in the current interview is lost. In program "crashes" such as these, the answers to previous questions are probably already erased by the same problem that caused the interview program to fail.

Reenter Case Management and reselect the same case you were interviewing and resume (or if necessary restart) the interview. If you cannot resume notify your RO of the problem.

The Computer Does Not Go to the Next Appropriate Question

Occasionally you may get stuck in a loop of just a few questions. If the computer does not go to the next appropriate question, carefully check your answers to each item as you step through the loop once more. You may have answered "yes" to the "any more persons" question, for example. The computer continues to go through the loop until you erase that answer and enter "no." If that doesn't work, try the F4 key to get to the jump menu. Jump to another part of the interview and attempt to continue from there. After you have exhausted all your options, you should reboot the computer as described above. Only reboot as a last resort.

Do not use the CTRL-BREAK key combination to get out of a locked interview, although someone may suggest this to you. This allows the end-of-interview processing of your Case Management file to occur, which you do not want if a program error terminated the interview.

Non-System Disk Error Message

A Non-System Disk Error message indicates that a diskette is in the disk drive while the laptop is starting Windows. Remove the diskette from the drive and press any key to continue.

Runtime Error Message

You may see a Runtime Error message during shutdown procedure. This will happen if you did not log in using your Entrust password and then tried to shut down using Encrypt and Shutdown.

Remember, logging into your laptop through Entrust is the normal login method. If you used the **Cancel** button at the Entrust Login screen, you bypassed the laptop's capability of encrypting your data at shutdown and the Runtime Error message notifies you of this abnormal Termination.

If you receive this message, press **Ctrl-Alt-Del** and select the Shut Down option. If the Runtime Error message occurs every time you try to shutdown, please inform your ROCS.

Your Windows Laptop User Guide (Form 11-7 (WIN) September 2004) contains more detailed information about your computer and how to use it.