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SUMMARY OF OBSERVATIONS: HEAD OFFICE OBSERVERS AND INTERVIEWERS

January 1993 Test

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EXECUTIVE SUMMARY

In January 1993, a field test of the Labour content proposed for the Survey of Labour and Income Dynamics was conducted. This report is a composite of three documents; thus, the report comprises three parts:

- Part A contains general observations of the test, as reported by members of the SLID head office project team who observed the interviewer training and data collection;
- Part B contains a summary of responses by a subset of interviewers in the test who were asked to complete a debriefing questionnaire after completing the test;
- Part C contains very detailed comments by the observers from Head Office which are not likely to be of interest to those outside the project. They are included primarily for historical reference.

An in-depth knowledge of the survey is required to a good understanding of this document.

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INTRODUCTION

In January and February 1993, the Survey of Labour and Income Dynamics (SLID) conducted a field test of the labour interview and the generalized Case Management system using computer-assisted interviewing (CAI). The test was conducted from the Toronto and St. John's Regional Offices with a sample of about 900 households in Toronto and 450 households in St. John's. These households had rotated out of the Labour Force Survey in May 1992.

Head Office staff conducted a four day training course from January 25 to 28, 1993. Two classes were held simultaneously in Toronto, and one in St. John's with about 10 trainees in each class. On January 29 some interviewing was carried out from each Regional Office. The test used rented IBM Thinkpad 300 notebook computers, USRobotics modems in Toronto and ZYXEL U-1496E modems in St. John's.

This was the first field test of the generic Case Management (CM) system and it was integrated with a rather complex survey application. SLID has special requirements such as functions to trace households that had moved, and has a large variety of question types and special features. Case Management was programmed in Clipper, and the SLID questionnaire used FoxPro and CHRR (software from Ohio State University). Considerable development effort was spent trying to make the screens look consistent to the interviewers, regardless of the software used.

The questions asked in the test are listed in SLID Research Paper 93-02 **SLID Labour Interview "Questionnaire" -- January 1993**.

This report is a composite of three documents; thus, the report comprises three parts:

- Part A contains general observations of the test, as reported by members of the SLID head office project team who observed the interviewer training and data collection;

- Part B contains a summary of responses by a subset of interviewers in the test who were asked to complete a debriefing questionnaire after completing the test;

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PART A: HEAD OFFICE OBSERVATION

1. SUMMARY

1.1 Observation Highlights

The training classes had trainees with mixed levels of experience. Some interviewers had never typed, and many more had never used a computer. It was very challenging to keep the whole class attentive to the training, especially when the knowledge of computers was so different. For the amount of content to be covered, and because many of the trainees needed individual help there should have been at least two co-trainers in each class (instead of one).

Four days were not enough to cover the use of a PC, CM and the SLID questionnaire. On the other hand, four days is appropriate for training on CM and the PC.

For their first exposure to CAI the interviewers wanted to become comfortable and feel secure with one way to do things. There were too many ways of performing the same function, especially within CM and there was an attempt to train on all of these features.

In spite of trying to standardize, there were inconsistencies between screens in Case Management, the parts programmed in FoxPro and CHRR. Some of these inconsistencies were unavoidable because different softwares had been chosen to produce a better package for the interviewers. For example, the CHRR approach with one screen per question works well in collecting labour information, with many skips and date checks. However, it has limitations for the collection of household roster information, and it was decided to program this section in FoxPro. Nevertheless, it is desirable that the basic functions should appear similar to the interviewer and in Test 3A, inconsistencies between and within software were confusing. For example, within SLID most screens required “initializing”, (pressing the down arrow) before entering an answer, to prevent the accidental keying of a response. However this was not needed in CM, creating problems and errors for the interviewers.

During training it was stressed that interviewers should “Read the screen” and they would know what to do, and this was not always the case in CM. For example, a frequent screen instruction was “ESC= EXIT” and “F10=QUIT” and sometimes they had the same function and sometime different ones. Problems were also caused by screens where there were no instructions, or an incorrect instruction which was frustrating for the trainees.

On the final day of training the students were taught how to hook up their modems, receive their assignments and transmit their day's work. At this point there were a variety of questions about the impact of the new technology on their homes, such as an increase in their electricity bills or the disabling of the call-waiting feature on their telephones. We did not have the answers to all these questions. In fact in Newfoundland, it was difficult to get information from the provincial telephone system on the latter concern.

Despite the above problems, the training went well and interviewers had a very positive attitude about learning new skills and participating in the test. One of the goals of a test is to identify areas that can be improved and this is the objective of the recommendations that follow.

1.2 Recommendations

1. Simplify the Case Management functions.

2. Improve the consistency of function keys to the standards that have been agreed upon i.e., modified CHRR functions.

3. All screens should be initialized regardless of the software used to create them.

4. Review all CM screens to ensure that a correct option to continue is displayed.

5. Give interviewers the PC before the training class to become familiar with the keyboard and have a typing tutorial or

“keyboarding skills” software package on the machine for those who need extra practice.

6. In each RO, investigate the provincial telephone systems so the details like disabling call-waiting and the configuration of the modems will be straightforward.

7. Provide information to the interviewers on the impact of the new technology on their homes.

8. In a class of persons with mixed computer experience have two trained persons (floaters) to help the trainer.

9. During the introductory course, train only on essentials and on one way of doing things.

10. Develop a generic training “questionnaire” to teach the interviewers the types of questions and screens they will encounter in any survey.

2. TRAINING

2.1 General

It quickly became apparent that four days were not enough to cover the use of a PC, Case Management and the questionnaire. However, four days of training is appropriate, given the complexity of the survey and the new equipment— the interviewers could not absorb any more information. The trainers rightly concentrated on giving lots of practice on becoming familiar with the computer and Case Management but it meant that there was little time for training on SLID content.

Many interviewers had never used a typewriter keyboard, let alone a portable computer. Most could have benefitted from a "typing tutor" or "keyboarding skills" package and ideally, this package and the PC should be available for practice before the course.

It was very challenging to keep the whole class attentive to the training, especially when the knowledge of computers was so different. For the amount of content to be covered, and because many of the trainees needed individual help there should have been at least two co-trainers in the class (instead of one).

2.2 Manuals

The interviewers received the Computer Operating Guide before the training but they did not receive the laptops until the start of the class. Parts of the text were not too meaningful until they had the hardware. This manual was considered clear and effective when used in the context of the training class, e.g., when hooking up the modems.

Because of SLID's tight development schedule, the Interviewer's Guide was distributed only at the start of training and it was not used extensively during the training sessions. Many interviewers read this manual in the evening as a review of the topics that had been covered. They commented that detailed explanations made sense only after receiving training and it would not have helped much to have received the manuals in advance.

In terms of content, the interviewers wanted more information that would help them motivate respondents, particularly why longitudinal data would be so valuable. They also requested more information on the reasons for asking certain items such as the support questions.

Many interviewers thought that they had been allotted two hours to read just the Computer Operating Guide when in fact the two hours was for this and the Interviewer's Guide. If they had received the Interviewer's Guide in advance, two hours would not have been enough for self-study of both manuals.

2.3 Sequence of events in training

The interviewers' goal at the beginning of training was to become comfortable with the computer. This implies that the first two days should be spent introducing them to the essential items, training on only one way of doing things. Showing different ways at the beginning only caused confusion. Days three and four should introduce complexities (difficult situations, flow reversals, etc.) and cover the difficult but essential tasks that must be performed.

Anything that is difficult, but not **essential**, should not be taught during the introductory course. Difficult items are more than the students can handle at this stage. Topics that fall into this category are things like: creating folders; sorting cases within folders; using the route function.

After six months of working with a computer, when the interviewers are more comfortable and are looking for short cuts, follow-up training (in a booklet or computerized tutorial) could be given.

2.4 Development of a generic training package

It is difficult to prepare a comprehensive training package while the development of the corresponding application is ongoing, as was the case for SLID Test 3A. It is impossible to set up detailed training cases (mock interviews) before a working model of the applications is ready. However, a generic questionnaire for training could be prepared independent of a finished application.

The interviewers had some problems getting used to completing the different types of questions, and moving around screens. The "Mark all that Apply" questions in CHRR, the relationship question in FoxPro, and the toggle function keys in CM were particularly difficult. It would be very useful to use a generic questionnaire to teach interviewers the types of questions and screens they will encounter on any survey.

The advantages of a generic training questionnaire are:

1) it would be the standard introductory course given to all new interviewers;

2) a comprehensive take home package could be developed;

3) future training, for specific surveys, could focus on the survey topics and issues, instead of "how to" instructions.

When developing this generic package the trainers would have to cover all standard question types from all the surveys using the new technology.

2.5 Training Cases (Mock Interviews)

As mentioned earlier, the emphasis of the training session was on Case Management and the use of the computer rather than on the content of SLID. Within the SLID interview, more training was required for the parts that were programmed in FoxPro than the CHRR section. This was mainly because of the contact screens and the complex new relationship question that was being tested.

Unfortunately there had not been enough time to set up the training cases for SLID so that, when the trainer wanted to cover a specific topic, one of the training cases was sitting at the first question of that topic. It was rather tedious to have to go through the up-front contact and demographics components just to get to a specific labour section.

There could have been more variety of responses built into the mock interviews, which would have given more practice with the use of the “Don't know” and “Refusal” function keys. CHRR has some very useful features such as an employer roster, a calendar, and the SLIDE for reviewing the answers to previous questions. Because of the time constraint, there was only minimal training on these functions.

3. CASE MANAGEMENT

The areas which caused the most problems during training or in the first day of interviewing are discussed below. Detailed observations have been passed on to the Case Management development team.

3.1 Initialization

Most of the CM screens did not require initialization whereas most of the SLID ones did. On screens that do not require initialization, as well as in pop-up windows, some interviewers would:

1) look at the screen and see that the answer they wanted was already high-lighted;

2) erroneously initialize the screen;

3) press the enter key (to accept the answer).

These actions were done without looking at the screen, so they did not notice that by initializing, the selected answer had changed. This can create serious errors, for example, interviewers could go through a final code without realising it because the screen to select the outcome codes of SUSPEND/FINAL did not require initialization.

All screens should be initialized regardless of the package used to create them.

3.2 The VIEW/SELECT CASES Screen

There is a lot of information on this screen and, as it is the first screen the interviewer works with, it is a bit intimidating! This screen was structured as three windows (one for the different folders, one with the list of households in the assignment and one for the record of calls). This was not obvious to the interviewers and it took them almost three days before they started to feel somewhat comfortable with them. The concepts of screens and windows are very important, and must be stressed during training. The interviewer must know when she is dealing with a screen and when she is dealing with a window.

Another problem with this screen was that it was too easy to go into the application and select cases - maybe there should be a START CASE? prompt after pressing <ENTER>

3.3 "EXIT" or "QUIT", Which one to Press?

The functions of the ESC key, (EXIT), and F10 (QUIT) are too often identical, and the words themselves are too similar, for them to occasionally have different functions. More frequently they had the same function and it was not always clear when the ESC and the F10 should be used. If only one function is needed, only one option should be displayed, instead of displaying both options and making them both do the same thing.

As a further source of confusion, sometimes the function displayed on the screen would not lead to the desired action. An example is the screen where the final status is selected. A message said that the status cannot be changed and to press ESC to go back to the previous screen; the ESC actually took the interviewer out and removed the case.

Sometimes there were no instructions on the screen on how to continue and interviewers got frustrated by endless loops. In training it was stressed that if they read the screen they would know what to do, and this was not always the case.

3.4 Notes

There are too many types of notes, and different ways of recording them and they caused great confusion for everyone involved. There were five kinds of notes and they could be created using Ctrl-F10 or through the F2 menu screen. Recording the notes required using a whole new set of functions for the function keys. F6 was needed to edit, F2 and F3 to increase or decrease the time and date. The whole process of creating and using notes seemed difficult.

Interviewers wanted the possibility of entering the information directly without using the F6 key, and to enter dates in the same way as in the rest of the application.

A message to use CTRL-F10 to record notes and appointments should appear on the screen where the interviewer selects the outcome codes for the household since usually you want to record the comments before you close the case. Temporary notes are useless unless you can see them in the VIEW/SELECT CASES screen.

3.5 Transmission

There were a lot of questions from the interviewers on the amount of time it would take to do the transmission - i.e., is the line basically unavailable from midnight until five a.m. ?

In addition, how to disable the call-waiting feature at the two sites has not been resolved. There are other problems in transmission that may crop up due to the various telephone features available. In the context of training and loading of assignments, the ZYXEL modem was better than the Robotics modem because it did not require special configuration to conform to the interviewer's home telephone. In Toronto, determining whether the phone was pulse or tone was an added complication to an already complex training session.

3.6 Managing an Assignment

Interviewers preferred to work with BEST TIME TO CALL showing on the screen on the VIEW/SELECT CASES screen rather than APPOINTMENT, since the latter is blank at the beginning. The most recent note or appointment should show up on the VIEW/SELECT CASES screen as soon as one has been entered or changed. The RECORD OF CALLS should be in reverse order - the most recent should be first on the list. There should always be arrows to indicate more information. For example, ↑ and ↓ to indicate that there are more cases on the list in VIEW/SELECT CASES screen and in the F3 pop-up for demographic information.

The procedure for setting appointments during the interview is too difficult - maybe it should always be an option under F3, rather than CTRL-F10.

3.7 Tracing

Training on the trace component seemed confusing, partly because the interviewers had not become familiar with the specialized CM functions such as using the F2 and F3 (increase and decrease) keys to enter dates and times in notes and appointments. Another problem was that the cursor went to the top of the information source list after each trace attempt. It should go to the most recent available source.

The meaning of the SOURCES and RESULTS lists were not always clear. For example interviewers seemed to think TRACED meant that they had obtained some information and they selected TRACED and went into the SLID interview. There should be a verification to confirm that they do want to go to the application when they give a result of TRACED

It was very slow to go from the TRACE module into the application, taking at least 30 seconds.

Tracing needs a Progress report, similar to the VIEW WORKLOAD REPORT screen, which would be updated throughout the day as the interviewer accesses cases.

4. THE SLID INTERVIEW

SLID was structured in modules or groups of questions. The contact, membership and demographic modules were programmed in FoxPro and the rest in CHRR. Of course the interviewers were not aware of what is behind the scenes but they did notice inconsistencies in how they entered answers and delays which occurred at the interfaces between the programs. Generally, the CHRR part of the interview performed smoothly. However during training, the interviewers were confused by the SLIDE feature that goes quickly back to previous questions, and they didn't see the potential usefulness of the F3 employer roster or calendar functions. Moreover, the "one question-one screen" constraint of CHRR created sequences that were considered slow and repetitious.

4.1 The Contact and Membership Module

It seems difficult to design a structured introduction to a survey. There were problems with the contact questions in Test 2 which was conducted in 1992. Again in Test 3, the first screens seemed difficult to master in training and caused problems during the early interviews that were observed. The CON-Q2 screen (Have you made contact?) was planned solely to indicate that someone had answered the telephone. However, because the contact person's name and address were on the screen header, the interviewers tended to confirm them at this point, and then have to improvise until they got back on track a few screens later. In addition, the concept of confirming the *people* in SLID is difficult since it is totally different than LFS where the interviewers are used to being concerned with the *dwelling*.

The second screen asked "DO ANY OF THE FOLLOWING PEOPLE STILL LIVE HERE? and listed the household members (as of May 1992). The interviewers had to initialize this screen and move to a Yes/No window to select the answer. The technique of completing this question required a lot of training. Moreover, the interviewers found the next series of questions to confirm membership and identify joiners and leavers to be repetitious.

Alternatives to minimize respondent burden and yet safeguard coverage will be explored.

The quality of the names on the input file from the LFS presents a potential problem for the start of the interview. In Toronto, during the loading of assignments on the interviewers' machines some cases were discovered where the household composition was Mrs. Householder, Mr. Householder, Boy Householder, Girl Householder, Anon etc. Currently there has been no training on how to deal with names like "householder" when confirming contact with the sampled household. Names cannot be updated at this point.

4.2 Demographics

This module consisted of questions on date of birth, marital status and school grade for persons under 15. Sex and family ID were not asked but were carried over from the LFS and could be corrected at a review screen. The only problem which occurred during training on this module was that the way of entering and correcting the date of birth was different than in the other date questions.

4.3 The Relationship Question

SLID was testing a new question to derive the relationship of each person in the household to everyone else in the household (rather than relating everyone to a single reference person). As well, there was a sub-question (pop-up window) to distinguish between birth/adoptive, step and foster relationships within a family.

This question caused problems both during training and during interviews. Training was difficult mainly because the procedures for completion were complex and unique to the question. Entering the relationships were very difficult and error-prone. Because the cursor always went to the top of the list of household members instead of the first blank row, some relationships were accidentally changed. In fact, at the beginning of training, interviewers were continuously changing relationships for the same person. Unfortunately, as soon as the last relationship was entered, the question disappeared from the screen and there was no way to go back to correct a mistake.

During interviews, another problem was that the interviewer would ask “What is the relationship of A to B”, and get the response “B is the son of A”. Often they would enter “child”, which would trigger an edit because A was older than B. As well, there were no edits for some of the less common relationships. In some interviews reversals could be observed, for example grandchild entered instead of grandparent.

This question was long and very confusing to respondents in large households and seemed unnecessarily repetitious and burdensome for a “typical” family - husband, wife and their children. Interviewers would have liked some way of fast-tracking the entry of the relations for a “typical” family. They also wanted to see age and gender on the screen beside the names, so that it could be easier to establish the relationships.

There are important analytical uses of data on blended and extended families but it is clear the method used in Test 3A to collect this information needs improvements or even a totally different approach.

4.4 The Labour Interview (CHRR Questions)

This module is fairly straightforward, and training generally went smoothly although there wasn't enough time to train on special features or have enough variety of mock interviews. Some questions in this section that seemed fine in a paper and pencil questionnaire are wordy and difficult when spoken. This was particularly evident in the disability questions which are based on the Census questions. Interviewers never read these questions completely, especially after the first person in the household.

Overall, most of the recommendations for this module are to fine-tune specific questions and they are reported in Appendix 1.

The final two sections END_CONTACT and END_PROXY were somewhat confusing to the interviewers. The first asked for additional information in case the respondent needed to be traced in May. It was not clear that we wanted the name of a contact person who was not living in the household. Moreover, too many screens were needed to record the information. Interviewers always tried to record the address, city, and postal code on the same line. It would be preferable to enter the information this way, rather than having to go to different screens for each part of the address.

The END-PROXY screen did not need initializing and it was easy to make an error by selecting the first person on the list. The interviewer often realized she had made the error but at this point a mistake could not be corrected because the interview was ended and one could not go back.

4.5 Inter-question Edits

The interviewers had high expectations that because they were in the world of computer-assisted interviewing where inter-question edits could be performed, inapplicable questions would be removed, leading to a shorter interview.

For example, in the questions concerning full-time and part-time work, once a respondent answered that he worked at the job full-time every month, he was asked how many months he worked at that job part-time. This question should not have been asked, because the answer can be derived from the previous response.

The interviewers also felt there should be more age skips to avoid oddities such as in the SUPPORT module asking a 16 year old, or a female of 80, whether they had any children under 18.

Clearly, this is an area which needs more work to smooth the flow and improve the professionalism of the interview. On the other hand there must be a compromise between the number of desirable edits and the number of checks the software can handle. Edits between different modules caused delays in the interview while the computer was “just checking” and these were disliked by both interviewers and respondents.

5. EQUIPMENT

5.1 Problems with the Thinkpad

The interviewers experienced a number of problems with the IBM Thinkpad during training. Even though they were rental machines, some of the concerns apply to notebook computers in general and should be considered when training on other laptops.

The keyboard seemed to be too soft for interviewers who were completely unfamiliar with a PC. Frequently they held the Enter key too long. This created problems, especially in Case Management where not all the screens required initialization. Interviewers made double entries, going through several screens without realising it. Because they did not realize the keys were so sensitive, in verbatim entries including names, the same letter appeared many times e.g., SSSSSSSSSSSSSSSSMITH, and corrections were tedious.

The notation on the keys was hard to see because the keyboard was black on a black machine. The interviewers often used the function keys instead of the number keys. It would be highly desirable if the laptop that is purchased for production has the function keys a different colour than the rest of the keys.

On many screens, the cursor was invisible. This was especially true on date entry fields. Generally, it was difficult to see edit messages on the screen, and difficult to set the screen controls. The setting for screen blanking was too short, and it blanked in class (but this probably would not happen in an interview).

During the training classes there were frequent machine freezes. Some were diagnosed as caused by PCDACS, the security software, when the machine was left in mid-interview while the class was away on a coffee break; others occurred apparently randomly, sometimes in the CM portion and sometimes in the CHRR component. The interviewers debriefing sessions have indicated that freezes also occurred in interviews, which was very unnerving. They also reported on a slowing of the machine at the end of a long day of interviewing and at the end of the survey. This may have been caused by hard drive memory problems related to the transmission and backup difficulties of the test.

5.2 Equipment Overload

In Toronto where interviewers came to the class by subway or from a distant parking lot, it was a real burden on the final day to carry home the PC in a box, the modem in a box and the headset in a box, as well as their manuals and other material. This was not a problem in St. John's because everyone could drive right to the training location. However in all RO's, large carrying bags should be provided for the interviewers.

5.3 Miscellaneous Concerns

There were questions about power consumption of the notepad when on trickle charge, and when in use, specifically the impact on their electricity bill, how much would it add, would they be reimbursed. Some interviewers with older houses without three-pin plugs asked about safety for themselves and safety for the machine if they used a two-pin to three-pin adaptor. Those who had call-waiting on their telephones were concerned that it would have to be disabled for the whole survey period.

We did not have the answers for all these questions but they should be investigated and the information put in the manuals.

6. CONCLUSIONS OF HEAD OFFICE OBSERVERS

This observation report is based on the interviewers' reactions during training, and on observation of interviews conducted Friday, January 29. Many of the problems would probably be minimized after more experience with computers and the survey. We underestimated the amount of material to be taught and the amount of practice to become comfortable with basic functions of the PC. Many of the inconsistencies between the software of SLID and Case Management arose because for both of them there was so much to develop and there wasn't enough time for testing. Now that problem areas have been identified there can be work to minimize them.

The observations from both Toronto and St. John's were remarkably similar and in spite of the issues discussed in this report everyone felt that the training went well and interviewers had a very positive attitude about learning new skills and participating in the test.

PART B: RESULTS OF INTERVIEWER DEBRIEFING

A subset of interviewers were asked to complete a debriefing questionnaire after completing the data collection for the test. This part of the document details the comments made by these interviewers, and provides a summary of the results.

Number of Interviewers:	**St. John's: 6 Toronto: 14**	**TOTAL: 20**

Question 1:

Was this your first experience with a computer?

St. John's	**YES: 4**	**NO: 2**	N/A: 0
Toronto	**YES: 7**	**NO: 6**	N/A: 1

Question 2:

Did the training you received adequately prepare you to do your work?

St. John's	**YES: 0**	**NO: 6**	N/A: 0
Toronto	**YES: 7**	**NO: 6**	N/A: 1

Question 3:

What changes would you recommend to improve the training program?

All the interviewers felt the training was inadequate. These are their recommendations:

- I think computer trainers and programmers forget how frightening it is when you first face a computer. My experience and that of other computer trainers tells me that people over 45 take longer to feel comfortable on a computer. One day longer would have been most helpful in the training.

- Two interviewers wanted: more time, especially for first-time users.
- Two interviewers wanted: More trial caseloads that we can practice with one another during training, and also at home before the actual interviewing on the test run begins.
- more mock interviews and complicated cases.
- Some of the wording is like a foreign language to the ordinary person trying to understand the questions. The word "dynamics" right at the start is a glaring example.
- We needed more training with the computer moving from one area to the other.
- more help with using the manual and for study. I did not feel comfortable using the manual for the actual questionnaire, as we usually do with our manual for other surveys.
- Time to do live calls with an instructor in attendance.
- Go step by step on the final day to make sure we have all processes that we are required to do down pat and in sequence, especially the tracing program.
- We need to be able to go back further. If you feel you've made a mistake you can't go back to see.
- We needed more "hands-on" interviewing to make us comfortable with questions and computer buttons and functions.
- A better qualified teacher.
- More training and more experienced computer staff to assist trainees.
- Too much information to absorb.

Tracing:

- More and better instruction on tracing and other cases that were not straight forward, i.e. joiners.
- I was a little lost when I first started using the trace folder.
- Tracing was hopeless, too little training. Perhaps a home study to complete after we were comfortable with the computer. I practised at home with the training cases.
- More work on tracing, notes, transferring cases and other bells and whistles.
- More time spent on tracing.
- We needed more time in tracing.

<u>Question 4:</u>

How long did it take you to feel comfortable with the software and hardware?

4 interviewers:	1 day
5 interviewers:	2 - 3 days
4 interviewers:	4 - 5 days
2 interviewers:	1 - 2 weeks
5 interviewers:	still do not feel comfortable

<u>Comments:</u>

- I felt quite comfortable with it pretty well the first day of interviewing.
- Most of the first week. Then came a break and it was hard to get back into the swing of things again. Even at the very end of the time period the survey was taking too long for each interview.

- ...5 days and then I couldn't work on it or 6 days so I lost momentum. It wasn't until the middle of the third week that I felt comfortable with the computer, about 2 weeks into the survey.
- ..the third day of actual interviewing I relaxed a bit...but until some things are changed, I don't think I'll feel comfortable.

  e.g. - waiting for a screen, there's too much dead time

  - screen's data is gone like a flash and you can't get it back to correct.
- I'm sure there are still some features I didn't use or didn't realize they were available.
- By the end of the first week of interviewing at home I felt more comfortable. I am still not comfortable with tracing. It would help if the computer had numbers at one side. Having the F functions at the top and numbers underneath was confusing, sometimes I hit the wrong one.
- About one week. I continued to learn as I progressed with the interviews and reviewed the training surveys often.
- I'm just beginning to feel somewhat comfortable working with the computer and I have almost finished the survey.
- I was not hesitant to tackle a "real" case, however I do not feel really competent.
- I don't think I would use the word comfort yet with the software, that was a lot to absorb in one fell swoop. The hardware was much easier to feel at home with. The screen is clear and easy to read, the keyboard is well spaced and easy to peck at.

<u>Question 5:</u>

Did you use the following features of Tracing and Case Management? Did you find them useful? What did you like? How could they be improved? Did any specific problems arise? If you did not use a feature, why not?

		Did you use this feature?		
a)	**Entering notes** (temporary or permanent notes)	St. John's:	**YES: 5**	**NO: 1**
		Toronto:	**YES: 13**	**NO: 1**

Comments:

- Nine interviewers found it very useful.
- Three interviewers: used it often after they became comfortable with the equipment.
- I kept getting in a circle and took a few times to get out.
- Temporary and refusal notes aren't visible and unless you know they're there, you wouldn't look. A flag on view and select would have been nice.
- Somewhat complicated, especially when respondent gave added information... at screens other than initial questions.
- Too many steps. Also why do we have to exit out of "View and Select Cases" and go back in before we can view the note?

		Did you use this feature?		
b)	**Making appointments**	St. John's:	**YES: 6**	**NO: 0**
		Toronto:	**YES: 10**	**NO: 4**

Comments:

- Seven interviewers found it very useful.
- Good placement on the screen.
- Getting it to show on the telephone list of names could be easier.
- I didn't really learn how to do that at the training session, so I wrote my appointment on a piece of paper.
- When entering appointments, you could only use the hours. e.g. 14:00, 18:00 I would like to have been able to use 14:30, 18:30, etc.

Did you use this feature?

c) Record of calls

St. John's:	**YES: 6**	**NO: 0**
Toronto:	**YES: 10**	**NO: 4**

Comments:

- Seven interviewers found it very useful.
- I had a good idea in my head of when I made calls and you learn from LFS **when** to phone people. A tracer might find this feature useful.
- Not enough spaces show.
- Didn't work long enough to learn code numbers. Could we use LFS letters (NC-no contact, B2-busy, CB-call back, AM-answering machine) instead of numbers?
- How many are we expected to make at each household? Only four could be noted.
- I seemed to run out of space and I couldn't access after first five or six.
- They should all appear on the form without having to cursor down. Sometimes I missed them, if I didn't cursor down and called again.
- I could only see the first four calls, but maybe I could have scrolled it up. (I forgot.)
- Should distinguish between no answer and busy. This would be useful when doing call-backs and tracing.

Did you use this feature?

d) Record of trace calls

St. John's:	**YES: 6**	**NO: 0**
Toronto:	**YES: 10**	**NO: 4**

Comments:

- Two interviewers found it helpful.

- This was not too helpful because I made entries that were false as I had some problems when I first started using the trace folder.
- This feature I used three times. It was useful but the last case did not transfer from trace to telephone when status was final. It remained in the telephone folder. Why?
- Need LD Operator as a source option. Display first x number characters of source, if other selected.
- I never really understood tracing. I couldn't find a list of the phone numbers I tried.
- Had problems with tracing.
- I wasn't comfortable with the trace calls.
- I could keep this information in my head, especially as you don't have nearly as many trace calls as telephone.

		Did you use this feature?	
e) Demographic pop-up	St. John's:	**YES: 6**	**NO: 0**
(F3 in assignment list)	Toronto:	**YES: 12**	**NO: 2**

Comments:

- Eight interviewers found it very helpful.
- Five interviewers: had a better feel for the interview before any one answered the phone.
- Two interviewers: found it very useful, but I had to copy the names on a note pad to be able to refer to them during interviewing.
- Useful but time consuming when the respondent had to wait for the results from two pop-up's for each member of the household.
- This feature was quite useful. I wished it could have popped up in different parts of the program, e.g. having established contact.

		Did you use this feature?		
f)	**Workload report**	St. John's:	**YES: 3**	**NO: 3**
		Toronto:	**YES: 8**	**NO: 6**

Comments:

- Seven interviewers said that it would have been nice if it had worked.
- Used daily to compare with my own report.
- I was always scanning to see how many I had done.
- Only worked at the beginning of the survey! But I think this feature - numbers not percent helps you get a handle on what's left.
- Very slow to load on PM machine but would have been very useful if reliable.
- Not available after transmission shut down.
- Didn't use after first day.
- Problems in our program showed completed cases as transferred out.
- No date to tell you on what day this report was for. I can see not completed, but don't know when.

		Did you use this feature?		
g)	**Status information**	St. John's:	**YES: 4**	**NO: 2**
		Toronto:	**YES: 10**	**NO: 4**

Comments:

- Six interviewers found it useful.
- Didn't use it much.
- Too time consuming. Couldn't one screen show all?
- I like the fact that the Status codes are there, but I did not use this feature. During training and reading the manual I remembered the status.
- It never did work on my computer. Did not give me accurate information.

Question 6:

What did you think of the way folders (telephone, trace, all) were organized?

Comments:

- Thirteen interviewers found them very good and well organized.
- Four interviewers found it good, but it took a lot of getting used to.
- Once I got the hang of the concept of how to bring up the folders and then move the bar, I found it easy to use. But for a computer illiterate person this was a difficult part of the program to get to work properly. In the training one needs a lot of work on these screens and moving the bar.
- Would like to be able to change phone number at first screen. I found I liked to select case and dial after first screen but was a problem when the number had been changed.
- If a docket accidentally gets sent to another folder (ALL), we can't get it back to the telephone folder where it belongs.
- Organization was good, but the things that occurred puzzled me. I had a partial, 2 household members completed, one member left to do. I suspended the case, continued with another case and completed that household. The partial went out of the telephone folder and the completed case stayed in the telephone folder. I cursored down to the completed case pressed enter and both switched. What happened?

Question 7:

What was most useful about the information displayed on the screen? What would you like to have seen that was lacking? Where would you have liked help screens?

<u>Comments:</u>

- Three interviewers found that the most useful was the F3 demographic.
- I like being able to view the composition of the family (F3) before starting the case. I would like to be able to call the name of the respondent to any screen.
- I found the verification of dates worked and absences helpful.
- If you followed the screen it told you exactly what to do. Confusing in demographics areas where sometimes you need Enter, sometimes F8 and sometimes Alt/F3.
- I would have liked to have seen the name of the city or town where respondents lived. The instructions on the bottoms of the screens helped. The notes from previous interviewers helped.
- I found it disturbing that the names of cities or towns were not displayed, especially in cases of tracing. Area codes are the same for quite a few towns.
- Town missing.
- I would have like to have been able to use the F1 HELP to get me out of some situations, but this wasn't always available.
- On screen where question about making contact, I would have liked family names again so I could figure out who I was talking to, if it wasn't the person named in the folder.
- The hardest question for me was the relationship section. If we could have accessed the household list with the head and wife and then the children during this question then we would have known them by name. As it was, just the name appeared and it was difficult to remember which was the father, mother, etc.
- Relationships and with dates were the areas where I had the most problems. If a mistake was made and I was aware of it later, there was no way to get back to correct it. This is where I would like more help screens.

- Have the Identification number on the screen at the end of the interview so it could be recorded on paper. When an interview has been interrupted and I go back in the first screen with the phone number, "Have you made contact" to come up again so I don't have to go back to the folder for the phone number.
- I'm not sure what you are talking about in this question, but here's something I needed often and had to write on a piece of paper which I kept beside the computer, <u>the telephone number of the respondent</u>. It's only displayed on the first 4 or maybe 3 screens but a number of times my interview was interrupted part way through and when I got back to them, I had quickly pushed enter as I wanted to start interviewing right away and of course the screen I had stopped at had no phone number.

<u>Question 8:</u>

Do you have any suggestions on how to improve tracing methods? Can you suggest additions to the tracing "sources" and "results" lists?

<u>Comments:</u>

- Tracing procedures needed more hands on practice for me. Found it difficult documenting information that I'd be able to find out from respondents.
- I never felt I'd mastered tracing so I don't want to comment.
- I had problems with tracing. I used the manual but still had difficulties. We didn't have enough training here.
- Neighbours, city directories, the long distance operator, the superintendent, all had possibilities. We didn't have much time to test tracing since we received the file at 4 o'clock on Friday, the office was closed over the weekend and we started LFS on Monday. Some of our returned mail does

have forwarding addresses on it which might be useful when we have time to co-ordinate.

- I thought I had traced people in my tracing file but when I found out they were not the people I was looking for, I tried to put them back in the trace file and they were put in ALL instead. I could no longer access the case to do the interview.
- Tracing using the contact person was quite successful. One person was annoyed to learn that I had traced her to the new address, but was willing to do the survey.
- Neighbours, relatives (or "other persons of same name"). I found the whole process very awkward. (I am an experienced tracer.) You need to retain the name of the original family (if there is one). They are usually your best starting point but not always with the same surname as the family. I would prefer an "open" screen where step by step progress (or lack of it) could be recorded.
- Should definitely have more initial training on tracing, as it is the most complex aspect of this program. I am sure I still do not realize all the methods I have available to be to make tracing easier.
- More training would have helped me. I found this part of SLID very difficult to get used to. There are so many "buttons to push" so to speak. And as I still won't have learned it well, I will be slow and uncertain when I have o do it again in May. Somehow I didn't find the manual as useful here as I thought it should be. I like the manual set-up. Here's what to do when the operator says, "This number has been changed to.... "Step l., Step 2., etc...Push Enter etc. Then when you reach the correct person here's what to do. I guess I should have spent more time practising on the test cases but I didn't seem to have the time to!!! Tracing sources and results test was fine for the limited tracing we could do from our homes.

- I found tracing difficult and didn't feel confident with this aspect of the survey.
- Did not use this section enough to become familiar with it.
- Contact the original interviewer. She may have had some conversations with the respondent and could have some information on how to trace her.
- I wasn't very comfortable with the tracing method. I could never find out what I needed to know. e.g. contact person or telephone number. When someone had left a household, things worked very well, but I didn't have any luck trying to trace a complete household. I couldn't seem to get any information display on the screen. Maybe it was just that the two households involved didn't have a contact person. I don't know.
- Could the tracing contact information from last year be easier to access?
- Additions:
  - last place of employment recorded from the previous year,
  - local post office for forwarding address.

Question 9:

Did you use the following tools or options? If so, did you find them useful? What did you like about them? Did any problems arise? If you did not use a tool, why not?

		Did you use this feature?			
a)	**Change name**	St. John's:	**YES: 1**	**NO: 3**	N/A: 2
	(F3 in Contact)	Toronto:	**YES: 5**	**NO: 9**	N/A: 0

Comments:

- Ten interviewers had no occasion to use this feature.
- Not confident about this, so I panicked when I needed it. Left a permanent note in the "ALL" folder.

- I never did figure out how to change an incorrectly spelled name.
- Yes, once I was sent instructions from R.O. on how to do it. Maybe there could be a box on END CON screen that alerts you that this is where you change a name. It's easy to use once you know where it is.

		Did you use this feature?			
b)	**Household list** (F3)	St. John's:	**YES: 4**	**NO: 1**	N/A: 1
		Toronto:	**YES: 11**	**NO: 3**	N/A: 0

Comments:

- Five interviewers found it helpful.
- Five interviewers found it very useful for beginning the interview.
- I wish I could have kept it on screen. I found I was writing names and ages on paper.
- I found it more useful to have the list of the household members printed on a piece of paper beside me... with big families, the list made relationships easier.
- I used them all the time to see who was included in a household, but I found it more comfortable to copy the names and ages on a piece of paper so I could keep referring to it during the interview.
- No need arose and no changes could be made from that list. What was entered was locked in.

		Did you use this feature?			
c)	**Calculate year of birth** (F3 in Demographics)	St. John's:	**YES: 4**	**NO: 1**	N/A: 1
		Toronto:	**YES: 10**	**NO: 4**	N/A: 0

Comments:

- Eight interviewers liked the feature and found it useful.
- Four interviewers did not need to use this feature.
- Two seldom used it but found it good to have available.
- Only had to use it in one or two cases. Most people know their year of birth. This question was difficult because sometimes one was not available and it was hard to move on.
- No problem. However, if a child was born in 1993, I was supposed to confirm that the child was -1 in 1992.
- After completing the birth dates test version 2.7, this option should have been available.

		Did you use this feature?			
d)	**Employer Roster**	St. John's:	**YES: 2**	**NO: 3**	N/A: 1
	(F3 in Labour)	Toronto:	**YES: 4**	**NO: 9**	N/A: 0

Comments:

- Three interviewers did not have occasion to use this feature.
- Good as long as it was the same employer in the question. In the case of a single employer, but several different places of work, it could become confusing. For example, substitute teachers working in several different schools.
- Tedious.

		Did you use this feature?			
e)	**Slide functions**	St. John's:	**YES: 4**	**NO: 1**	N/A: 1
	(Page Up, Page Down, Home)	Toronto:	**YES: 14**	**NO: 0**	N/A: 0

Comments:

- Five interviewers found it useful.
- Three interviewers used this feature to go back when the respondent wanted to change their answer.
- I would've liked to have been able to go back further.
- At the beginning I only used page up. I would have liked Page Up to go further back than just the current section you are working on. I wasn't confident enough to use Page Down, but I feel it is useful.
- Sometimes I encountered a problem with the machine refusing to accept Enter after using the Slide feature.
- This was another function I didn't master. I used up and down but not home.
- Did not become fully aware of all possibilities of the slide functions.
- I was too flustered to have much success with this function when I realized I had made a mistake. I was never sure when it would work.

		Did you use this feature?			
f)	**Comments** (F2)	St. John's:	**YES: 1**	**NO: 2**	N/A: 3
		Toronto:	**YES: 5**	**NO: 7**	N/A: 2

Comments:

- I didn't have time during an interview as I am a slow typist plus most people are in a hurry and this is a long survey. I could have added them after the interview was over, but the case was finished.
- I used it a few times to record the difficulty of the interview.
- Sometimes it was not what I was looking for.
- There were times when I forgot about this option. Most respondents were straight forward with the answer they gave that left nothing for comments.
- Didn't realize it was there.

- I tried this a few times and it did not work. I'm not sure which questions I can use this with.

Question 10:

Did you use any other tools? (Specify) Do you have any suggestions for tools that you would have liked but were not provided (e.g. a calculator) ?

- Thirteen interviewers did not respond to this question.
- Used a pencil sometimes.
- Another tool that would be useful is a "Speller".
- Why were there options offered on the bottoms on some screens that in fact did not work? Why were they there (other than to totally frustrate the interviewer)?

Question 11:

Our approach to collecting relationships between household members was quite new. Do you have any comments?

- RED ALERT - TOTALLY UNACCEPTABLE. This question is far, far too long. Simple man/wife with five children involves 20+ questions, about 60 keypunch operations and an annoyed respondent. I usually ended up exiting and going back to relationships. However, this route could lead to more errors because the Interviewer is relying on memory. Also, having to move the cursor down for each relationship led to errors and confusion generally. How about some blanket questions.
- BIG WASTE OF TIME. VERY IRRITATING TO RESPONDENT. At the beginning of the survey it made the interview very slow and caused irritation with the respondent. It was the WORST AREA on the survey.
- This took a lot of time and it was very easy to make an error.

- Too long and confusing.
- Collecting the relationships was awkward, lengthy and sometimes confusing.
- Very irritating to the respondents. Too time consuming.
- I did not like this part of the program at all. It was complicated sometimes as the bar keeps moving even when the Down Arrow is not pressed. I had a couple of problems getting out of this, especially when someone moved out.
- This was the most irritating part to me and the respondent.
- Forget it. It is awkward, time consuming and turns off respondents.
- Much too long and tedious for the person supplying the information.
- In cases where people were all natural members of the family, it became a little repetitive.
- Quite confusing.
- Too cumbersome. It took too long, especially for 5-6-7 respondents. Establish in the beginning if these are birth children. If so, skip these needless questions. If not, then ask these questions. Also the bar kept going to the top respondent. Sometimes I'd forget to bring it down to the next person, so information would change by mistake.
- This was too complicated and time consuming for the respondent.
- Still a bit time consuming moving the bar and using windows.
- No problem with small households but it was sometimes very difficult to sort all members out in large extended families.
- Wording too cumbersome. Could have been more simply worded. Respondents confused.
- It was awful. I found the screen difficult to read and the combination of entering and arrowing down was never smooth and the repetition was aggravating for respondents.

- Most first reactions were "a stupid waste of time". Because the bar doesn't automatically travel down to the next member, this question took me a lot of time. I had to keep apologizing for asking the obvious. Credibility of the interviewer suffers here. As I got better at the keyboard I asked all the relationships at the beginning and then punched them in. Please move that cursor bar down automatically if you insist on keeping this question. P.S. I only had one family in 49 interviews where the relationship was unusual.
- Only one interviewer found this "easy and effective".

Question 12:

Did you get many error messages (edits)?	Did you use this feature?			
	St. John's:	**YES: 6**	**NO: 0**	N/A: 0
	Toronto:	**YES: 5**	**NO: 9**	N/A: 0

Question 13:

Was the problem clear to you?	Did you use this feature?			
	St. John's:	**YES: 4**	**NO: 2**	N/A: 0
	Toronto:	**YES: 10**	**NO: 2**	N/A: 2

Question 14:

Was it easy to correct the problem?	Did you use this feature?			
	St. John's:	**YES: 2**	**NO: 4**	N/A: 0
	Toronto:	**YES: 8**	**NO: 4**	N/A: 2

Comment:

- The cursor should stay on the person you are doing. It took awhile to get used to it.

Question 15:

Do you have any comments concerning the error messages?

Comments:

- Seven interviewers had no comment on this question.
- At first I was too anxious, but found them helpful later.
- I only had an error message on the date of birth and I had to practice and re-read the manual to get the hang of this error message. Again more training on this would have been helpful.
- This caused no work for several days, but when solution disk arrived the repair was fast and easy and work continued smoothly after that.
- If people don't know the date of birth or some other question, it should be possible to go on with the survey and then perhaps get the information at a later date when someone else would be home to supply the answer.
- You cannot dictate the circumstances of families. For example, I had a Turkish woman who was married at age 12, which is not young in her country. The computer would not accept it. Review these edits.
- Usually very good to make you see your mistakes.
- Very good. Perhaps I had touched the wrong key by mistake. It certainly helped correct errors.
- Most of the error messages that happened was when I forgot to arrow down or read the screen.
- At first they confused me because I didn't know that to do about it. But, it got easier.
- Time and practice are all we need to understand this.

Question 16:

Did you feel that there were areas that required more or less documentation? Do you have suggestions for additions or deletions?

- Nine interviewers had no comment on this question.

- A Quick Reference Trouble Shooting Guide would have been useful when the interviewer encountered a problem while on the telephone. Point form instructions on the trace folder functions, adding messages, transferring cases, etc., might have been useful. Perhaps these could have been help screens.
- I found the whole thing slow and cumbersome. For instance why not ask in the health question, "Do you have any disabilities or on going illnesses?" and if no skip the "Where" questions. The care giving/receiving questions are awkward. Also in the work section, "Is this still correct name?". I found no one who said no and if necessary a comment should do.
- I felt that after we had established the name of their workplace, it was to repetitive to ask them is .... the correct employers name. It could have been done on one screen.
- I felt the health questions could've been more concise. They were too lengthy.
- The health questions could have been shortened. The Support Question 10, under age 18 should be much lower. Most respondents with 15 and 16 year olds felt this did not apply and made it very awkward to ask the following question #11 and #15. Question 3 and question 7 should be one question.
- I found the Health questions backwards. The first question should be: "Do you have a handicap or disability lasting six months or longer?" If no, the other questions are eliminated.
- Much less documentation concerning management positions and less entries for a contact person.
- There are places where the comments key should work but does not and sometimes this is needed.

<u>Question 17:</u>

Did you feel you knew what was coming up next in the interview? Did you find that the instructions concerning the flow of the questionnaire were clear and helpful?

Comments:

- Five interviewers responded "Yes".
- Some introductions were rather long, but there was no problem with anticipating the flow in spite of different modules.
- After the first few I knew.
- Felt after I knew the routine this was a real waste of time to get on to the next screen.
- I feel you didn't need this screen at all. It just took too much time.
- Did not like this particular instruction - not helpful. I find it better to wait and ask a direct question because many started giving answers that did not pertain to the question at all. This caused confusion. Most just had one employer.
- I knew very quickly what the next questions were and ended up not reading (to myself or to the respondent) these screens and just punching enter. Frankly, I think these screens are a waste of time and time is of the essence in these interviews, particularly with a family where 5 or 6 of them are eligible. Do you know I spent 53 minutes on the phone with one man!! Do you think he'll be wanting to hear from me again? I think the question itself is a good introduction. SCRAP the instructions.
- I did know what was coming up next after the first day or so of interviewing. Most of the instructions or lead up's to questions were too wordy and I just simplified them, especially health questions sections. Too awkward.
- Yes, I knew what was coming up next. Instruction screens were very helpful.

- Sometimes I knew what was coming up next, but then for some unknown reason another question would come up. I would like to have had a copy of the questionnaire.
- Only in simple cases did I know what was coming up. In problem cases, I was never sure until questions appeared on the screen.
- After several interviews I knew what was coming up next and I had no problem with the questionnaire part of the program. There were no problems regarding jobs and absences from work.
- These screens were unnecessary and took extra pauses.

Question 18:

In general, what was the respondent reaction to the survey?

3 interviewers had no problem with their respondents.

12 interviewers generally had no problem in collecting the data although some did complain.

5 interviewers had respondents with strong complaints.

Comments:

- Respondents often said it was someone else's turn. People remembered being bothered by the Wildlife questionnaire.
- In general, as I got their sympathies with me as a first time computer operator interviewer, all my respondents who finished the interview, except two, were understanding of the length of time required. No one it or asked why I was asking certain questions. If I detected a hesitation especially with language difficulties, I reworded the question and justified it.
- Most were good humoured but found it long, especially in larger families where the repetition is deadly.

- Most people were agreeable, but when the interview went on a long time they got restless.
- Some were absolutely fed up with being surveyed.
- In a few cases, respondents commented on the length of the interview.
- Took too long and they didn't understand what it was all about. Could not see the need for collecting this information. The introduction to the survey did not explain what the purpose was and people like to know what good it will be for the country as a whole to do this survey.
- Many respondents were angry that they were called again after last year, even when told this was a test and the importance of it. They were fed-up because of the many calls of the "Wild Life" survey. The other few respondents were interested especially when I said we were using computers for the first time. It took too much time, especially between some screens.
- Good. Now I did have 6 refusals. These people refused for different reasons, but the main problem was that they felt they already did their share in doing surveys last year. It was a big respondent burden. They did a lot of supplements.
- Many felt that the 6 month LFS was enough. They felt that another survey was expecting too much of the family. All of my refusals cited these reasons. Also felt that the questionnaire was too long.
- The interview was too long, especially the questions on Health. This could have been reworded to make the interview shorter. Another example here is the demographics. Too much time spent before you get into the actual interview.

<u>Question 19:</u>

Did respondents hesitate to answer when they weren't sure of dates? Were there any other questions in which respondents hesitated? What questions?

Comments:

- Eight interviewers found that the respondents did not hesitate.
- I found that they did not like to say how many hours they helped others who needed help. They could not understand why this was asked. They didn't like to call it "unpaid help" and did not want anyone to think that they would have wanted to work rather than help those in need.
- Yes, they hesitated when they weren't sure. Sometimes uncomfortable about giving this data. I found a lot of people very unwilling to give a contact person. I didn't like asking the address and phone number when they were reluctant to give a name.
- The relationships were the worst. I think because it made no sense.
- Yes, a lot of them took a guess as they did not want to spend the time to look up specific dates or had no definite record on hand. The main question they hesitated on was if they were absent one week or longer from each job. Some don't remember too easily.
- Most people who answered for themselves knew dates and when answering for others would either check or make a "guestimate". Certainly the month was known. I only had trouble with dates in a family who will be a refusal next time. The questions on unpaid child care and looking after someone who couldn't look after themselves had to be read slowly and clearly as the questions are unusual.
- They often had to think about dates about most questions. Health particularly whether or not arthritis qualified as a long term condition. - No hesitation.
- Yes, they hesitated if not sure but more so in the day than month and year.
- Most respondents, I felt, were giving approximate answers. Respondents did not at times know the postal code at their place of work.

- Actual days created a problem at times but not months. Respondents knew exactly what months they started and finished work, but not so much the actual days.
- Yes, the contact questions.
- Sometimes respondents couldn't remember exact dates so I asked if it was alright to take the first or middle of the month and they usually remember that way.

Question 20:

a) Was the respondent you contacted able and willing to provide information for other household members (by proxy)?

b) Did you find any difference between proxy and non-proxy responses?

Comments:

a) The interviewers found that most of the proxy respondents were able to provide the information, except for some that required the non-proxy respondent to provide the information directly.

b) The majority found no difference in the information, however there were some instances where the information differed.

- Yes, the respondent often in my cases had to provide information for the whole family due to language difficulties. Proxy respondents don't know exact day when someone started and stopped a job. They also wouldn't know the addresses of employers. Few people knew postal codes. Thank heavens for F6.
- Most times when a respondent changed jobs in 1992, I was better to talk to the respondent non-proxy, unless the other person says they can fill in the dates we need.

- Most respondents I contacted were quite able and willing to provide information for other household members and were well informed about them and their employers.

<u>Question 21:</u>

a) How did respondents react when information was fed back to them?

(For example: "Based on our interview of a year ago, ... had a job with (employer), but he/she was not at work around the beginning of January 1992. Is that correct?")

b) Did respondents question how you knew this information ?

c) In situations when the information was denied, how was it resolved?

<u>Comments:</u>

All the interviewers found that their respondents did not find this problematic.

- Not one person questioned how we knew that information because I had <u>so much time to fill while the computer was loading in the files</u>, that I would talk about the SLID survey, its importance etc., so the respondent wouldn't think I had gone for a coffee break...slight exaggeration here! Most people seemed impressed by the information feedback and I was able to make a number of corrections. This part was much easier than correcting with pencil and paper.
- Four interviewers stated that "usually respondents didn't question how I knew the information, because we had already discussed that this was a follow-up of last year's surveys".
- It made them feel more comfortable with the validity of the survey.
- That worked out very well. They felt that this was really authentic when we had this information. It saved time and every one now-a-days seems to be in a hurry.

- ...seemed to ease their mind that I was legitimate and a professional.
- Good. The contact person should also have been recorded from a year ago because the respondent remembered giving this information and we shouldn't have asked again. It should have been available to us and we could have confirmed it.
- Most respondents had already remembered they had given this information. There were no problems regarding this.
- Respondents knew how information was obtained but I feel strongly that with long questionnaires and by contacting the household so often our Labour Force Survey is in jeopardy.

Question 22:

Did you find any sensitive questions or questions that respondents had a difficult time answering in the following sections? What was the question? What was the problem?

Four interviewers did not respond to these questions. The interviewers found no sensitive questions other than the responses that follow.

a) Preliminary Questionnaire

- ...when asking in-depth questions people were impatient.
- Most sensitive was why did so and so leave. I had a 12 year old who left the family. This was a sensitive situation especially when I had to get his new address and telephone number, even though the case ended up as a "3" without having to do an interview.

b) DEM - Demographic data

- Would like to be able to return to these questions for correction when at the end of the interview.

- I had problems here with some people because of language.
- Biggest problem was the time it took.
- Was too complicated and in a large household took up too much time. It made the interviewer look like we didn't know what she was doing. The questions have to flow easily without too many pauses to get the respondents' confidence.
- Difficult to get out of this section, if all demographics were available, even though it was covered in class.
- Was frustrating to the respondents. In establishing every relationship to each person respondents will tell you these are my children or spouse. This another example of how the interview could be cut shorter.

c) DATES - Employer and jobless spell

- Difficult for some respondents to recall particularly when there had been several breaks in employment.
- Dates were difficult to remember for multiple job owners.

d) CHAR - Employer characteristics, absences

No comments

e) SEARCH - job search

No comments

f) DISAB - Activity restriction, health problems

- I found this section could have been reversed. Q1 - Do you have any long term handicaps or disabilities? If no - end the session. If yes - ask whether at home, at work or in leisure time activities.
- The disability Q06 should have been asked first. If Q06 was answered "No" the remaining disability questions were unnecessary. Going from

component to question #1 is very slow and was very awkward waiting for the change.

- Disability was too long and used too many screens. This should have been one question under one header and toggle down to the responses at work, at school, at home, leisure time activities and toggle in the ones that apply to this respondent.
- Why not ask the question at the beginning about any chronic health problems and then skip the others. Many said it was assumed that they had health problems and they had none.
- Respondents did become frustrated with the repetitiveness of the disability questions...
- Q1A: Eliminate. Incorporate the two questions.
- In some cases people felt that it was a waste of time asking disability questions for everyone. Maybe this could be combined or worded differently.
- I sometimes had to paraphrase some of these questions.

g) SUPPORT - Care giving and receiving

- ...did not like to say how many hours they helped others who needed help. They could not understand why this was asked. They didn't like to call it "unpaid help" and did not want anyone to think that they would have wanted to work rather than help those in need.
- A number of people were confused by these questions.
- Incorporate this question with the next.
- I usually had to paraphrase these questions.
- Support questions had to be explained many times for people to understand.
- This question wasn't even clear to me. I don't know if it was meant for outside the household or household included.

Other Comments:

- We should have been provided with the actual survey in booklet form so that when there were pauses we could prod the respondent, while waiting for the screens to come up. When I got used to it, I would enquire about their 1992 employment activity while waiting for the screens.
- It's when you have to interview 4, 5 or 6 people in the same household that nerves get frayed. So that's why I ask for the computer to load and change the files more quickly, probably impossible on this computer that you have chosen.
- I enjoyed working on the computer. It was more efficient, did all the skip patterns and led onto the next appropriate question. I liked the lack of paper work, no editing especially.
- CON Q2 - I feel that you could eliminate CON Q2 and go right to CON Q3.
- Q1 - Eliminate. Don't need a lead-in. We know we're going to be doing the employment question.
- Question: Manager, Supervisor, Something Else. Change the "Something Else" to "Other" or another word. This comment got quite a few laughs.
- Seasonal Work: Difficult to do. Awkward.
- It would have been nice to have a copy of the questionnaire.
- Sometimes pauses were long and people would get impatient but overall people were very patient.
- There were three large pauses in the interview: one after the demographics and relationships, then waiting for the screen to begin the actual interview for the individual household members, after talking about the weather there was a pause to get to the actual questions.
- Is it possible to correct names, birth dates, sex, marital status and Famid on one screen? (e.g. Roster Test Version 2.7)

- You know, I think the clue to getting answers for any questions is how you the interviewer feel about the questions. If you think they are difficult or sensitive questions, then that hesitation or embarrassment communicates itself to the respondent.

COMMENTS FROM INTERVIEWERS WHO DID R.O. TRACING

<u>The following question applies only to interviewers who did R.O. tracing.</u>
(2 responded)

How did the tracing work go? How could we improve our procedures? What did you think of having some cases as regular tracing and some as R.O. tracing?

- Very difficult. Did not really have time to start the tracing.
- As an R.O. tracer, it was terrible!

COMMENTS FROM THE SENIOR INTERVIEWER

1. How did the transfer of cases work? Could it be improved?

- Did not work.
- It didn't and even when it was more or less working there was a delay of more than 2 hours between transmission and availability for pick-up.

2. Did you like the control tools that you were provided with? Can you think of some that you would like that were not provided?

- The assignment number and reason for transfer (final code) for dockets sent to us would have been useful. View Workload screen was useful but painfully slow to load.

3. Were you able to solve problems?

- Yes. Most problems which were solvable were solved relatively quickly. Transmission and back-up problems were frustrating but entirely beyond our control.

4. Please comment on the reports that were developed for Test 3.

- The manual back-up reports were fine and would have been much easier to use if the computer reporting system had also been available. However in that case, they would, in theory, have been superfluous.

APPENDIX 1

DETAILED COMMENTS PARTICULAR TO THE TEST
HEAD OFFICE OBSERVERS

1. GENERAL

- Preset Caps Lock to "on". Do not rely on interviewers' memory.
- F3 function to calculate year of birth (in DEM) a good feature but should insert the date automatically.
- Some confusion about method of entering "Code all that apply" questions, compared to questions with one choice from a list of options.
- problems with dates; Needs more instruction on how to correct typos in DEM dates; Method of changing dates in Notes/temp and appointments (F2 or F3) not consistent with other date questions.

2. CASE MANAGEMENT

2.1 General

- Ring No Answer should be a separate code from Busy in the application status codes (CMSTAT).
- Date and time values on the PCs are crucial to both Case Management (CM) and SLID functions. They should be validated as part of the logon routine.
- If there is a break in an interview (i.e. call back to talk to other members of the household) the interview will be starting from the component screen. At this point the interviewers need to be able to "pop-up" the intro to the survey and the household member list. They may be talking to someone new and they need to say who they were talking to previously, since completed interviews are no longer on the component screen.
- Application status not correct—had a case where there were 5 completed at person level and 1 refusal at person level - application status assigned

was "000" (complete data) rather than "001" for partial data at the household level.

- If you don't complete CON, i.e go to END-CON, and the roster, there are no spawned households. For example, there was a case where 2 persons moved out, and a refusal before CON finished, no spawned docket created.

  Stress in training to complete CON before a final status is given.
- Screens sometimes don't have instructions on how to back out or continue.

  All CM screens should be reviewed to ensure a correct option to continue is displayed.
- Should always have arrows to indicate more information. For example, ↑ and ↓ to indicate that there are more cases on the list in VIEW/SELECT cases screen and in the F3 pop-up for demographic information.
- Setting of appointments during the interview is too difficult - maybe it should always be an option under F3, rather than Ctrl-F10.

2.2 VIEW AND SELECT CASES screen (CMSLID1)

- Too easy to go into application from this screen - maybe a START CASE? prompt after hit <ENTER>.
- An awful lot of information is on this screen.
- Most recent note or appointment should show up on this screen as soon as they have been entered or changed.
- Temporary note and appointment note are basically useless unless you can see them in the VIEW/SELECT cases screen.
- No instructions on how to back out of Telephone folder to transfer Case screen (trained to use F10, and never ESC) but ESC is route out.
- Interviewers preferred to work with BEST TIME TO CALL showing on the screen on the SELECT CASES screen rather than APPOINTMENT, since to begin with Appointment is blank.

- RECORD OF CALLS should be in reverse order - most recent should be first on the list.

2.3 NOTES

- Both ESC and F10 do the same thing, take you back to the previous screen.
- The F6 key to edit the notes was seen as something not required. Interviewers wanted the possibility to write the information directly . In the same way, the F2 and F3 keys to increase or decrease the date and time seemed hard to the interviewer.
- The indication to use Ctrl-F10 to record notes and appointments should appear on the screen where the interviewer selects the outcome codes for the household. This is where they were instructed to use it since usually you want to record the comments before you close the case.
- A related issue is that CTRL-F10 seems to be active all the time, but does not appear on the option list at the bottom of the screen. Since there is no more room at the bottom of most screens, perhaps this option should be stressed in training.

2.4 Tracing

- The trace component seemed confusing, partly because of specialized CM functions such as using the F2(inc) and F3 (dec) keys to enter dates and times in notes and appointments. Other problems were over how to make the source and results pop-up windows appear, ↓ and <ENTER>, because the " more" small arrows didn't show up well on the screen, and the fact that the cursor went to the top of the ID list after each trace attempt.
- Confused about "Proxy" vs "Contact" as sources.

- Need a Progress report - similar to the VIEW WORKLOAD report but would be updated throughout the day as the interviewer accesses cases.
- In Sources list, add long distance operator as source.
- When you give a result of TRACED in tracing, there should be a verification that you do want to go to the application. Interviewers seem to think TRACED meant that the source resulted in some information.
- Sometimes in TRACING, the RESULT pop-up will be "frozen" on the screen. Can continue working but only get rid of the window if exit TRACING and go back in.
- Slow to go from TRACE module into the application.
- Sometimes the ID numbers of the TRACE attempts skip numbers, looks like it has something to do with the # of times a specific source is attempted before getting new information and consequently assigning a new ID number.

2.5 Specific screens

CMINTTRCE1

Cursor should go to first information source that is available - currently goes to the first on the list even if it had a result of END.

CMESTAT1 & CMESTAT2

Should initialize. Now you tend to press a down arrow and get out with a final status when you don't want to.

The screen where you select the outcome codes of suspend/final should always have to be initialised to prevent going through a final code without realising it.

VIEW REPORT

When you have selected a report, it says to hit F10 to continue. However, the F10 key is not working and you actually have to use the ESC to continue.

FINAL STATUS

There is a message that says that the status can not be changed and to press escape to go back to the previous screen; the ESC actually kicked us out and it removed the case.

CMSTAT2

Can there be arrows to indicate that there are more codes to come ?

WORKLOAD REPORT

Was a surprise that when you hit <ESC> you go immediately back to the MAIN MENU + PC beeps. Expected to back out screen by screen (which is what usually happens).

CMPOP1

Screen does not have instructions on how to back out

CMREF

F10 and ESC both take you back to CMPOP1

BACKUP

Says to hit any key to continue but not the case - <ESC> and <SPACE> keys didn't work.

F2 Menus

Confused interviewers; some chose it to return to the main menu.

Rename Menus to something else; add a return to Main menu as an option

F2=ALLTAG/UNTAG

Some problems getting the idea of toggling

Esc=to previous screen & F10=to previous screen

It was not always clear when the ESC and the F10 should be used. When both the F10 and the ESC were available to quit a screen, only the F10 should be displayed. Would "CLOSE" and "END" be better words?

MAIN MENU

Should be ordered in logical sequence with interviewer actions grouped, and then maintenance functions.

CMPOP1

Screen doesn't have instructions on how to back out; F10 and ESC both take you back to CMPOP1

CMTRCSTAT1 & CMTRCSTAT2

No choice displayed on screen to select, only options F1 help and ESC = return to trace, go in loop

Should display ↩ to SELECT

COMP1

No instruction to select <ENTER> on instruction panel only choices are Esc, F10 and F1(not consistent with Read your screen training) (does this happen only when you enter from suspend?

Should display ↵ to SELECT like CMESTAT1

3. CONTACT MEMBERSHIP DEMOGRAPHIC

3.1 Contact and membership

CON-Q2: (Interviewer: Have you established contact?)

Caused problems because interviewers tended to read the header and confirm the contact's name and address, thus causing problems with flow when they got to Q3 & Q5.

Change wording

CON-Q3:

Problems initializing to get Yes/No window; also tended to confirm membership here, then CON-Q7 seemed very repetitious.

CON-Q4

How can you change name, when does changed name show on screen?

Clarify in training.

CON-Q5

(Intro) led to Refusals; "voluntary" a problem; also should make sure we are confirming mailing address.

Change wording

CON-Q9

Problems entering and correcting dates (first time for dates)

Standardize entry of dates and give more examples of correcting in training.

CON-Q7 and Q11

"Live or stay" and "Babies or newborn children", "or stay" and "or newborn children" were considered redundant and likely to confuse respondents.

CON_REVUE Press <Esc> to continue

END_CON (next screen) Press <Enter> to continue

(Mover window) (next screen) Press any key to continue

Inconsistency—Standardize how to continue

DK and Ref

Don't need to initialize in CON/MEM, have to initialize in CHRR

ROSTER

Can you change "Press F8 to continue" to a more standard key.

Interviewers found it awfully slow in one-person households to go from demographic to the message that said the relationships did not have to be done, then to go to COMP1 to select the only person there.

Do we have any way to speed up the process, and to skip certain screens?

3.2 Relationship question (DEM-Q7)

DEM_Q7

Confusing, error-prone and burdensome

a) Visually confusing- now displays WHAT IS THE RELATIONSHIP OF John Jones TO?

Husband/wife	Mary Jones
Birth/adoptive parent	Jane Jones

perhaps change flow to left to right

WHAT IS THE RELATIONSHIP OF John Jones TO?

Mary Jones	Husband/wife
Jane Jones	Birth/adoptive parent

perhaps try a matrix display

perhaps try linear questioning

b) Highlight bar goes to top of Hhld list leading to interviewer continuously changing the same person or making other unintentional changes

c) disappears when last relationship is entered

Needs some way to review and correct

4. CHRR MODULES

4.1 Preliminary

EMPPRE-Q1

EMPPRE-Q2

"THIS YEAR" needs actual year displayed as reference - questions are a mixture of 92 and 93.

EDUPRE-Q4

Needs clarifying that it means post-secondary, doesn't work well for 15-18 year olds.

EDUPRE-Q12

Doesn't work well for 15-year olds

4.2 Labour

DATES-Q32.3A

don't know or Refusal in January (-2 or -1) makes error message "Date must be after . . ."

CHAR F3 employer roster

"double negative UNENDED" No, very confusing . Why isn't it worded "ONGOING"???

CHAR_N1

(Begin) was in lower case but interviewers read it.

CHARQ-9C&D

Needed more variety of examples in training, e.g. DKs for street address and postal code.

What is place of work for a salesman's job?

In interviews, Street and number and postal code of place of work not known (both non-proxy and proxy).

CHAR_13

Training examples were not consistent with LFS procedures or descriptions

CHAR-Q14 & 17

Flow, wording. If "No" or even "Yes" to Q 14, wording of 17 was odd.

CHARQ19A

Confusion about a part-time job worked every month, i.e. (Thur. Fri. Sat) is this worked all of the month, or is it part of the month?

CHAR19B

If the answer to 19A is "All months worked at this job", shouldn't they be skipped past 19B (how many months worked part of the month)?

CHAR Q22 & 23

Sentence seemed hard to read, perhaps needs comma after WITHOUT PAY.

CHAR-Q19ONC

Respondents didn't know what "On-call" meant.

4.3 Disability and Support

DISAB-Q1A

Introduction too wordy.

DISAB-Q2 & 3

Interviewers tended to read the lower case intro.

DISAB-Q5

By the time of this question, interviewers tended not to read the intro which was in upper case.

DISAB-Q6

Considered redundant, after both "Yes" or "No" to other questions.

Support: general

Too long and not understood. The concepts here seemed very fuzzy and overlapping. It would be helpful to separate children from everyone else who was getting help.

SUPPORT-BEGIN "EXCLUDE PAID HELP"

seemed too terse— this concept seemed to have been missed in discussions in training.

SUPPORT-Q1

Long discussion whether young children would be included as needing care because of "AGE".

SUPPORT-Q2

Does category CHILD mean your own child? (since spouse is obviously your spouse)— comment that everyone spends time providing help to their own young children.

SUPPORT-Q6

This question seemed to duplicate what people had answered about children in Q1, and again raised the question about whether to report care given to their own children.

Care giving should be one word

SUPPORT-Q10

a) Children under 18???— age cut-off too high.

b) Respondents over 65 and under 18 should be skipped around it.

4.4 End

END-INTRO

Very wordy, yet not clear it should be a friend or relative

END-INTROA

at a different address. Burdensome when at the person level.

END_SAMEAS & END THANKS

Two Rosters almost in sequence, confusing.

END THANKS

Wording sounds odd unless it is after info for last household member.

END_PROXY

Confusing, roster again, should be practice on how to enter a 99 (i.e. respondent, who is not a household member).