

# Planning and Performing Quality Control of Computer-Assisted Personal Interviewing

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# Acknowledgements

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- Chris Schlapper
- Kate Krueger
- Karen Zoladz
- Nick Schultz
- Rob Schultz
- Kyle Krueger
- Thomas Francis
- Dakota Zarak

# Overview

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- Why we perform quality control (QC) in Computer-Assisted Personal Interviews (CAPI)
- How we perform quality control
  - Notes review
  - Verification calls
  - Monitoring
  - Feedback
- Forecasting and planning quality control

# Overview

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## Why we perform quality control

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- Ensures high quality data for our clients
- Guards against data falsification
- Helps identify and correct data errors before data delivery
  
- Ensures high quality interviewers

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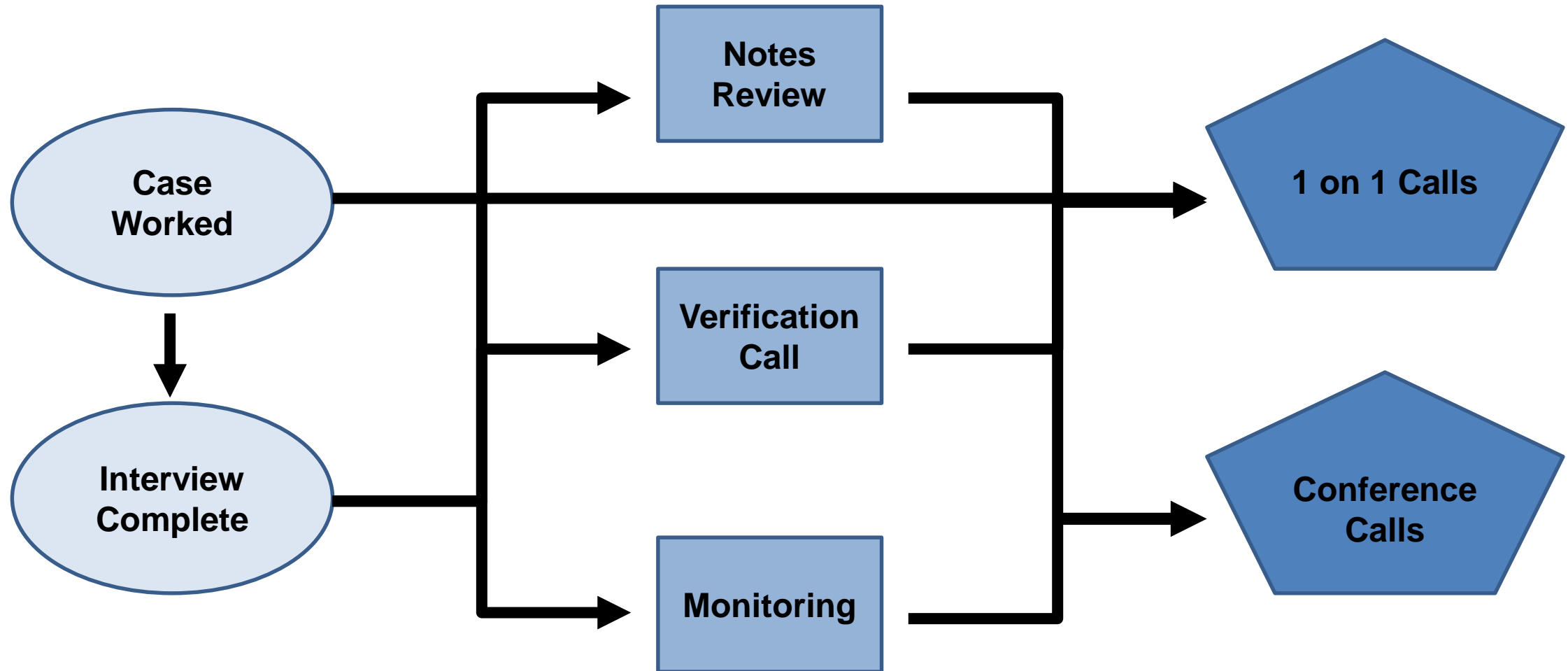
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# How we perform quality control

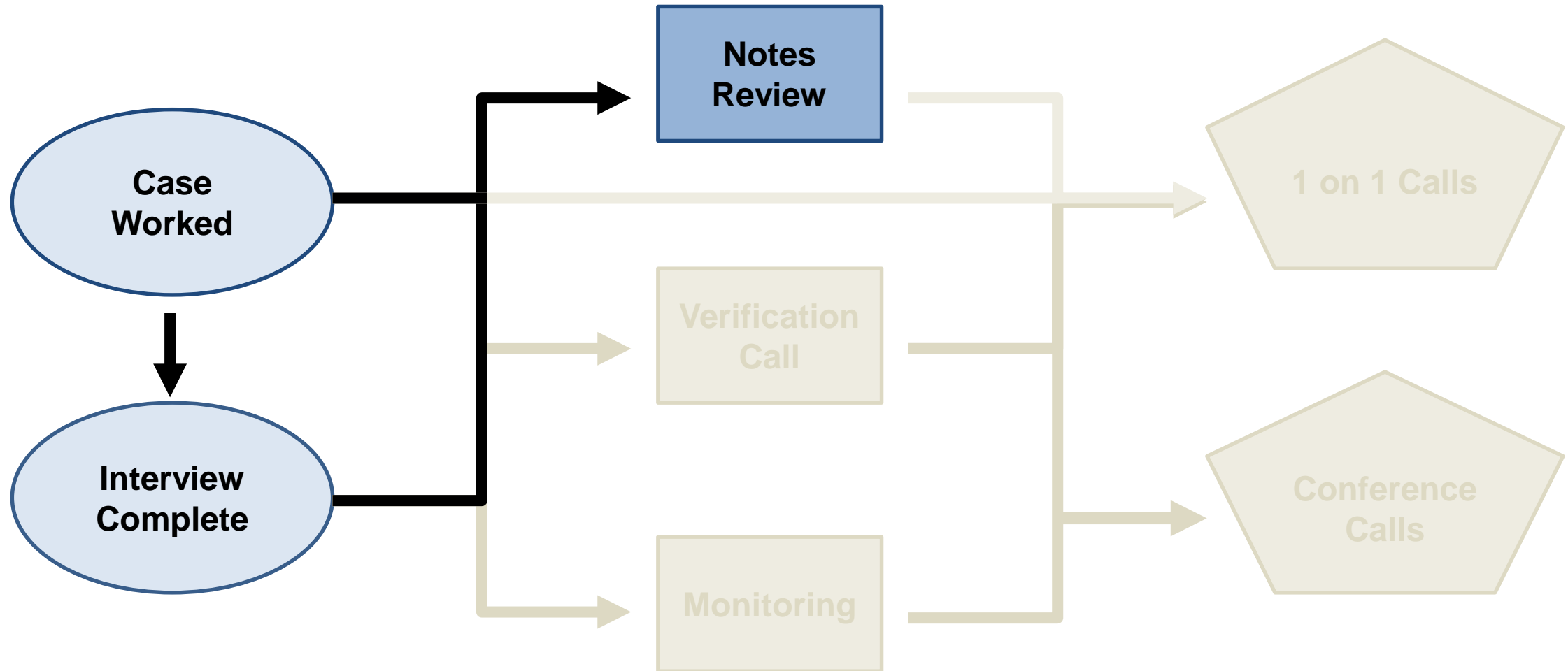
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# How we perform quality control: Notes Review

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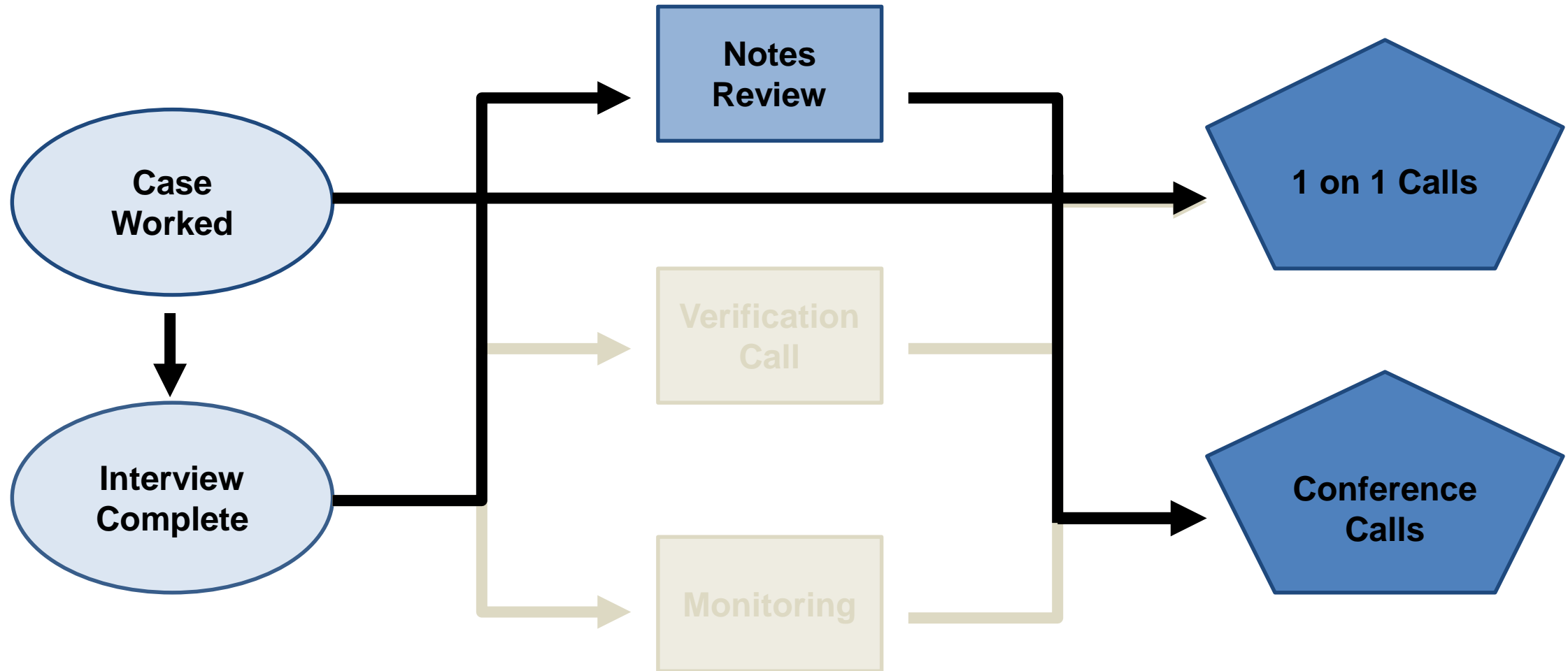
## How we perform quality control: Notes review

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- Closely examine all notes left in a case
- Review 100% of all case notes in Field
- Notes review identifies potential:
- We use a Notes Review Database for notes within CASES instrument

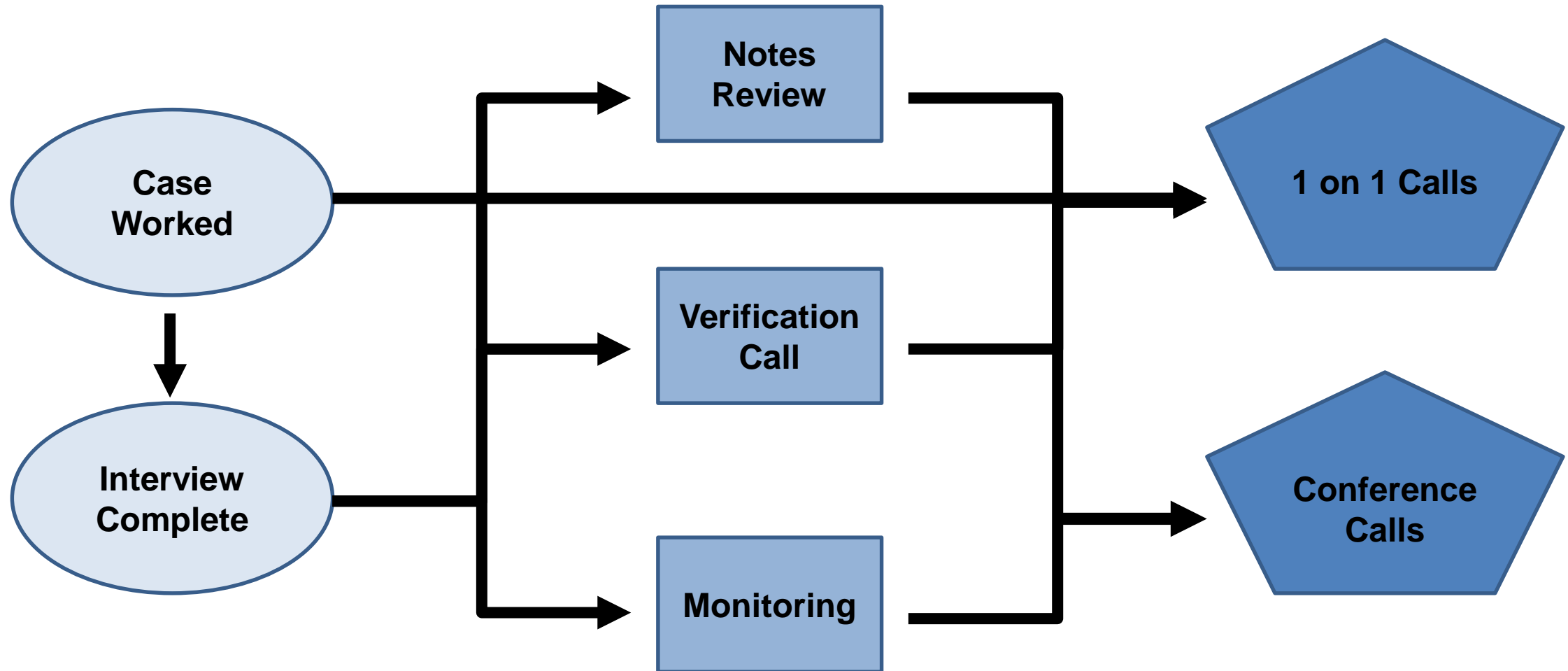
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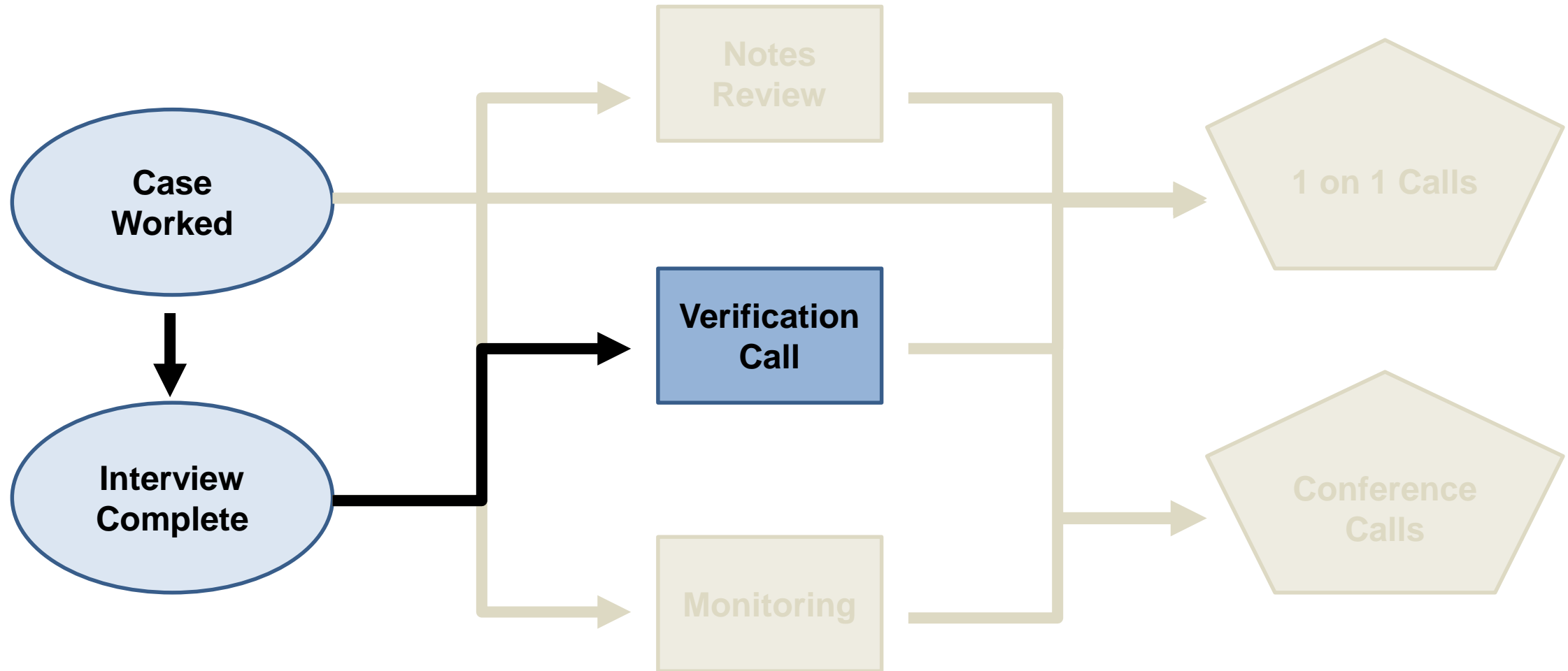
# How we perform quality control

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# How we perform quality control: Verification Call

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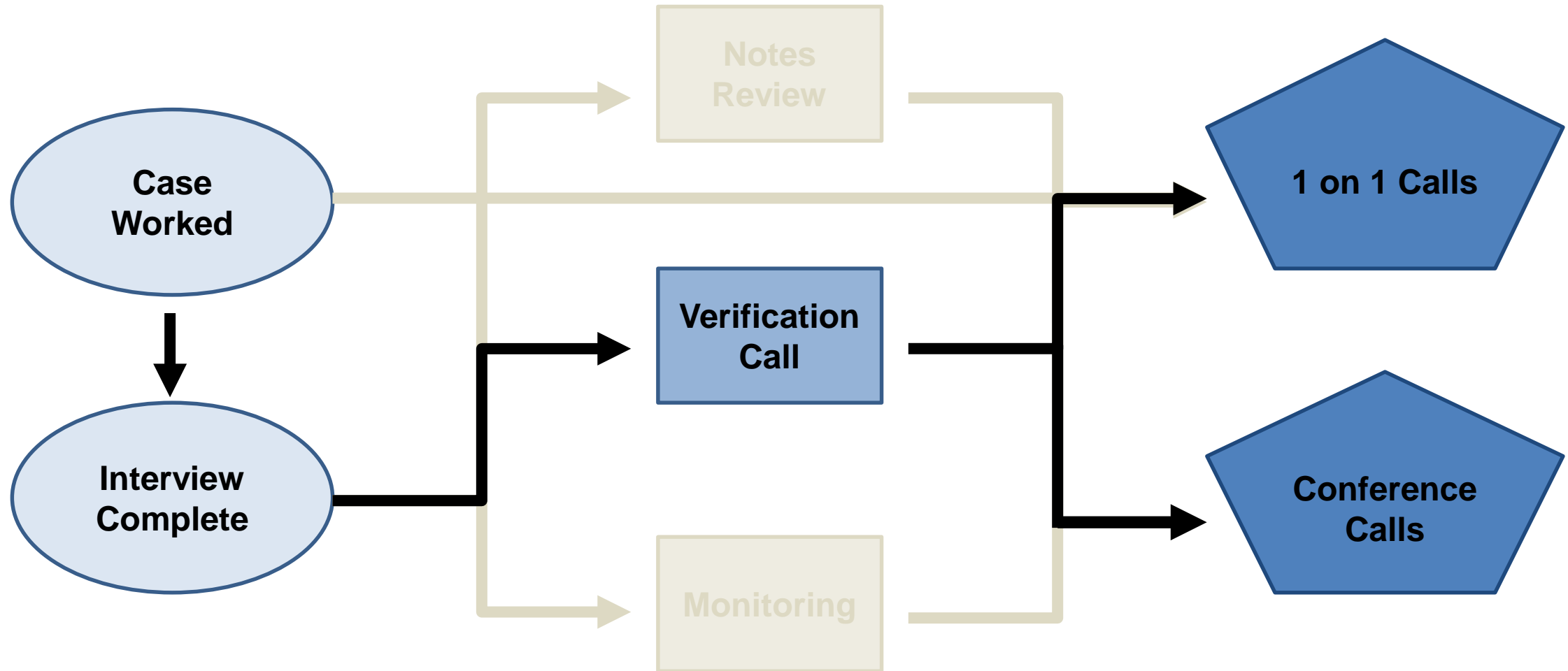
## How we perform quality control: Verification Call

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- Were there any problems or concerns you had with the visit or the interviewer?
- Was the interviewer courteous and respectful?
- Did the interviewer speak clearly?
- Did the interviewer talk about themselves personally in a way that was unprofessional or a poor use of your time?
- The interviewer should have given you \_\_\_\_\_ cash to thank you for your participation. Did you receive that amount of cash?
- Is there anything else you would like to tell me about the visit?

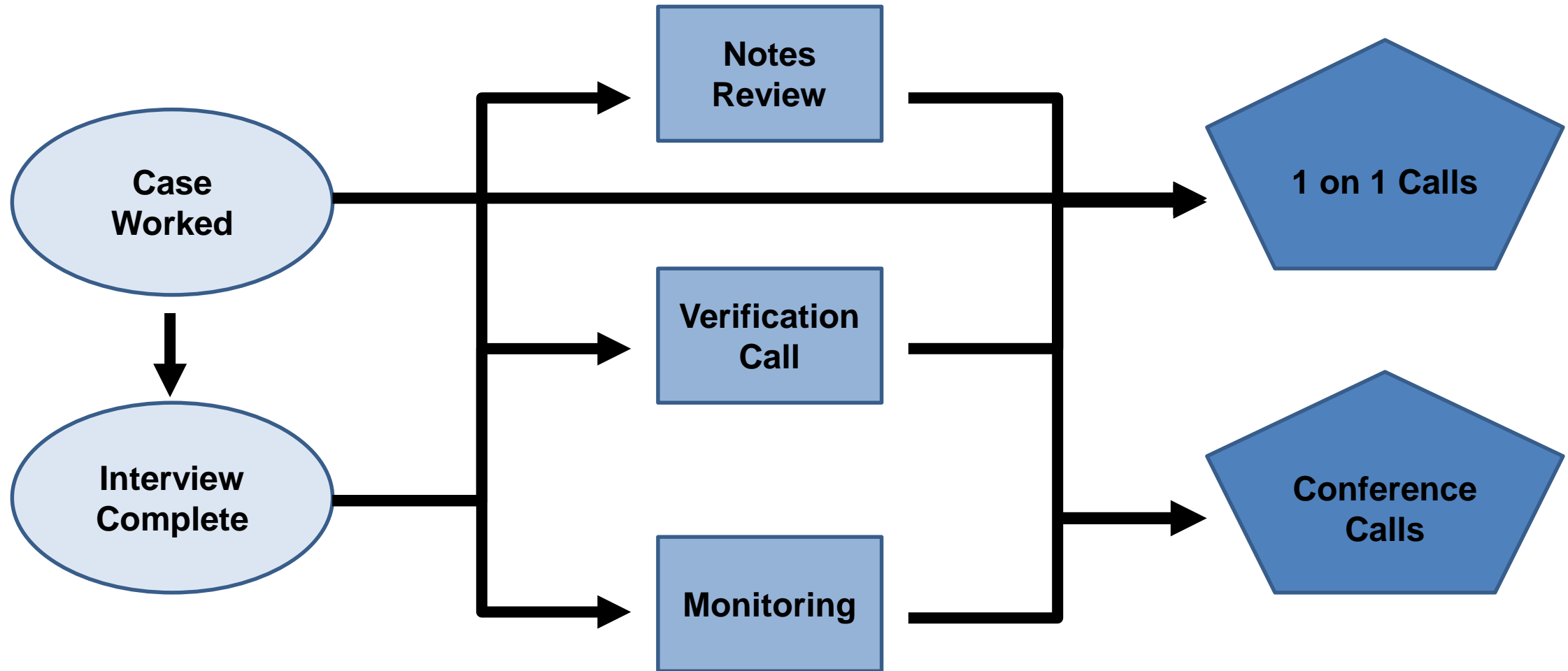
# How we perform quality control: Verification Call

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# How we perform quality control

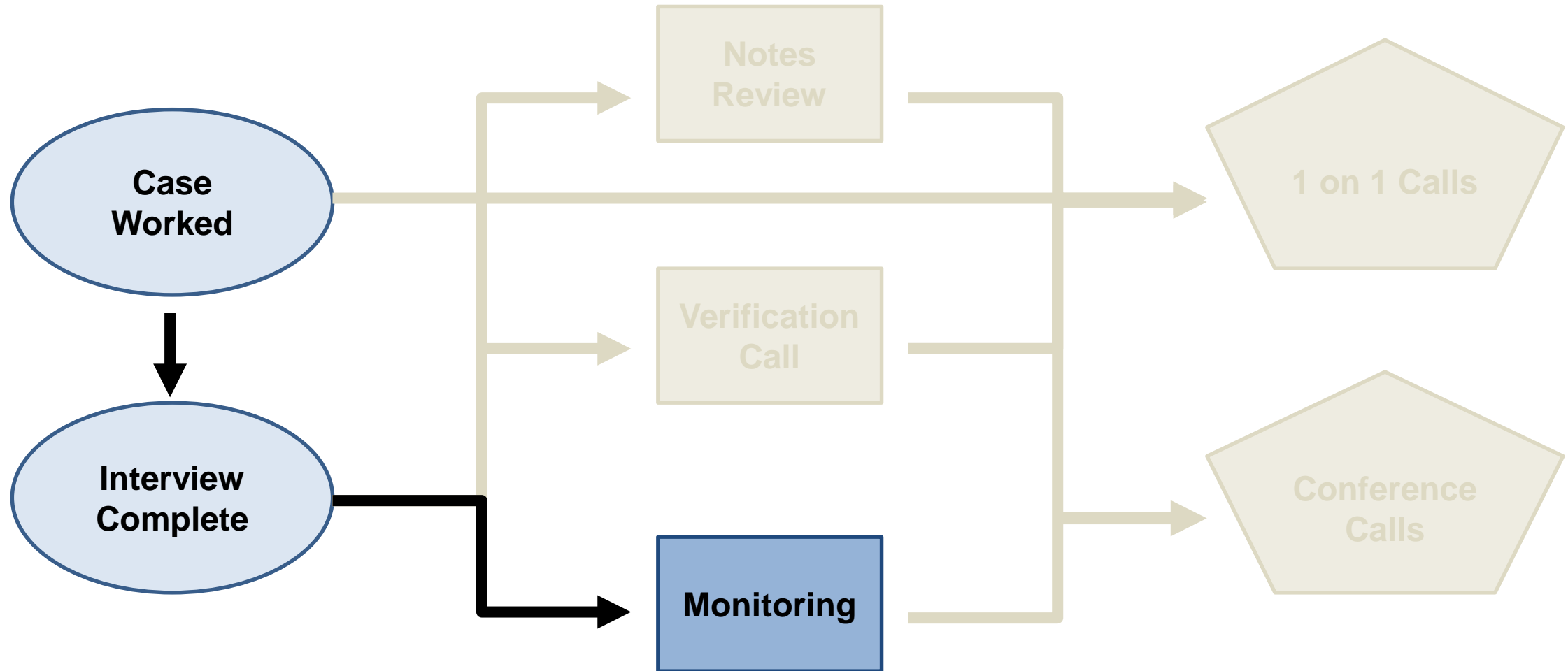
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# How we perform quality control: Monitoring

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# How we perform quality control: Monitoring

## Create New QC Records

Project: P1224: WiscFams Year 2

Review Type:

Project Instrument: WiscFams Year 2

Complete Date From:

Interviewer:

Complete Date Through:

Case ID:

Search

**Selected**

**Case ID**

**Iv ID**

**Interviewer**

**Complete Date**

**Recording  
Permission**

**CAPI by CATI**

[select all](#)

Random Selection %:

Create

# How we perform quality control: Monitoring

- Interviewer protocols
- Standardized Interviewing
- Interviewer administration
- Study specific protocols

Interviewer Protocol	
<b>Verbatim</b> - Reads each question exactly as written, including directives.	<input type="radio"/> Always <input type="radio"/> Mostly <input type="radio"/> Sometimes <input type="radio"/> Never <input type="radio"/> Not Applicable
<u>Comments</u>	
<b>Does Not Interpret</b> - Does not provide interpretation of a word or question, except for definitions included within the instrument.	<input type="radio"/> Always <input type="radio"/> Mostly <input type="radio"/> Sometimes <input type="radio"/> Never <input type="radio"/> Not Applicable
<u>Comments</u>	
<b>Remains Objective</b> - Does not share his/her opinion about interview questions or respondent's answers.	<input type="radio"/> Always <input type="radio"/> Mostly <input type="radio"/> Sometimes <input type="radio"/> Never <input type="radio"/> Not Applicable
<u>Comments</u>	
<b>Enters Responses Correctly</b> - Open-ended responses are recorded with R's exact words, without abbreviation, and in first-person voice. Close-ended responses correspond to the codes provided in the instrument.	<input type="radio"/> Always <input type="radio"/> Mostly <input type="radio"/> Sometimes <input type="radio"/> Never <input type="radio"/> Not Applicable
<u>Comments</u>	
<b>Case Notes</b>	<input type="radio"/> Always <input type="radio"/> Mostly <input type="radio"/> Sometimes <input type="radio"/> Never <input type="radio"/> Not Applicable
<u>Comments</u>	
<b>Interviewer Protocol Overall</b>	<input type="radio"/> Exceeds Standards <input type="radio"/> Meets Standards <input type="radio"/> Needs Improvement <input type="radio"/> Unacceptable
<u>Comments</u>	

# How we perform quality control: Monitoring

Overall Performance

Exceeds Standards    Meets Standards    Needs Improvement    Unacceptable

Comments

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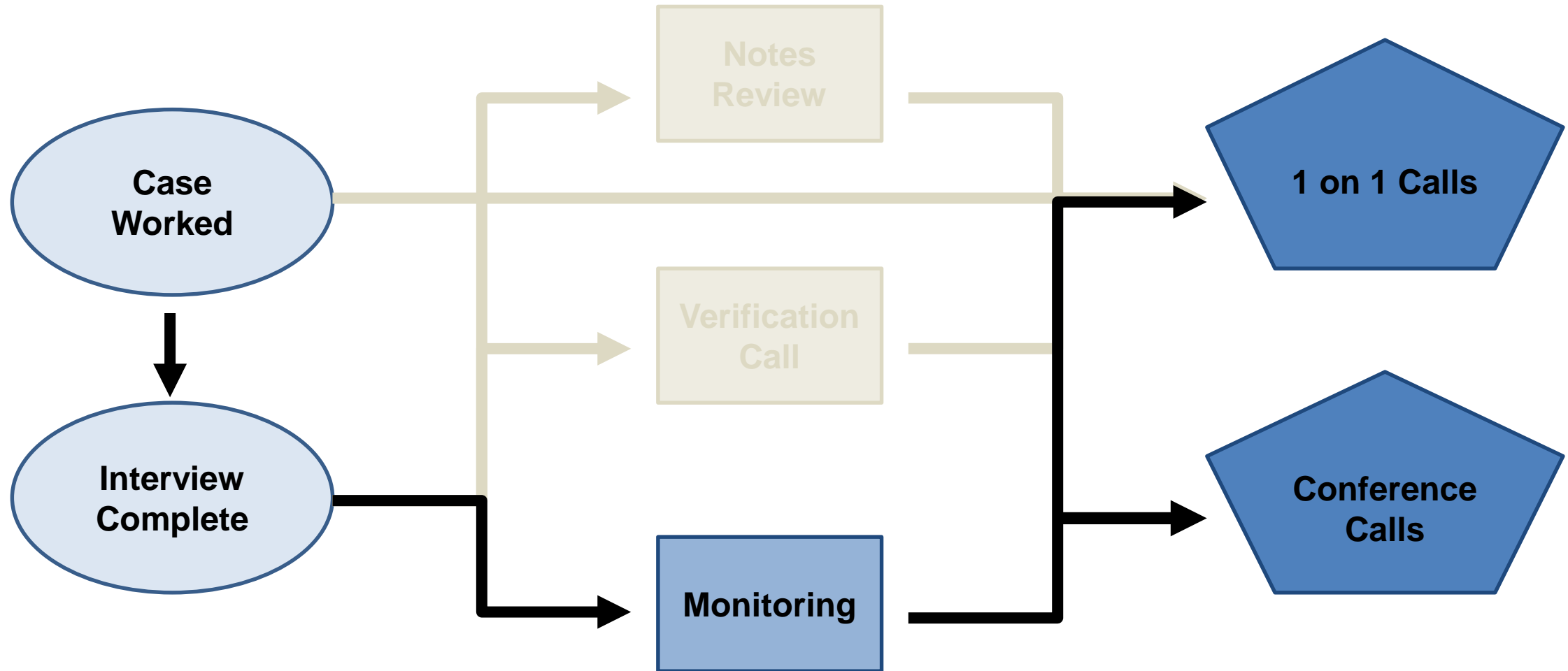
Set Status: Pending

- Pending
- Initial Review Complete
- Review Complete

Accept Cancel

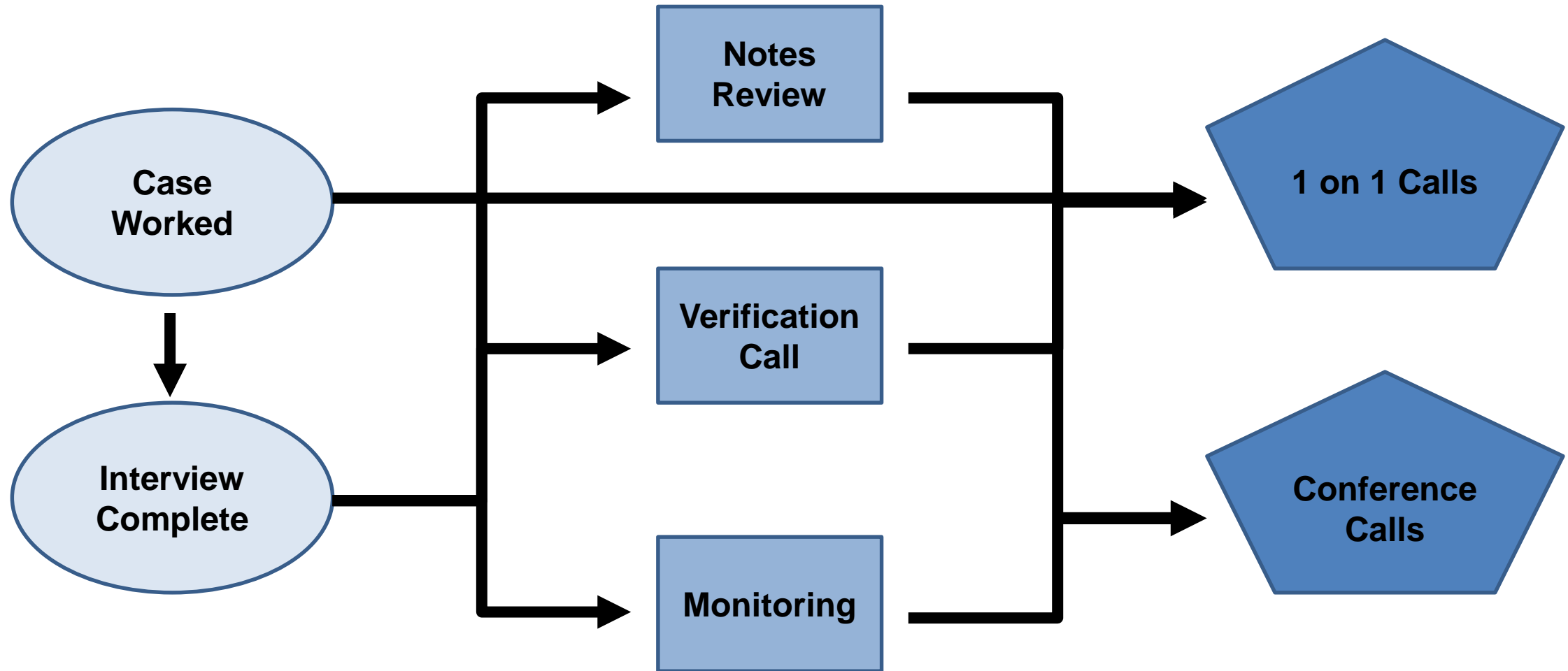
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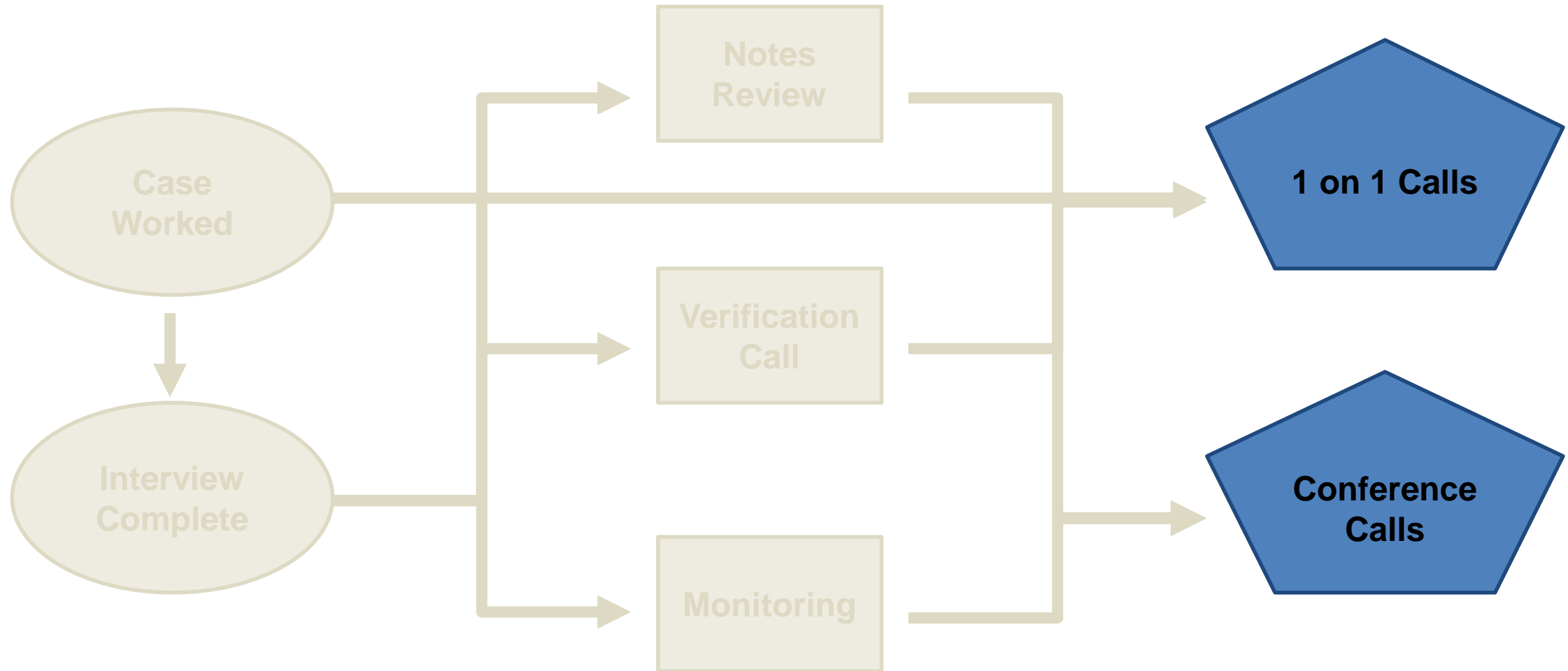
# How we perform quality control

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# How we perform quality control: Feedback

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## How we perform quality control: Feedback

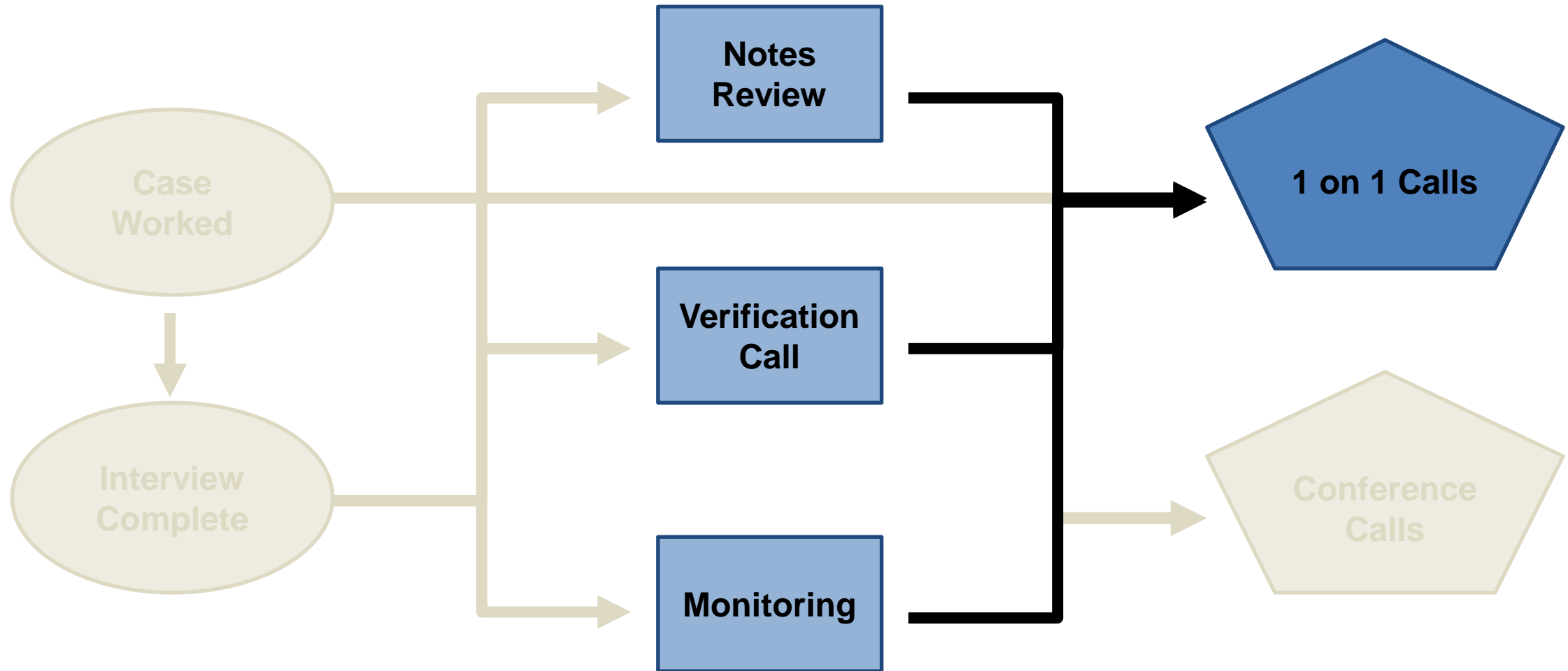
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- One-on-one Calls
  - 1 Interviewer + 1 Supervisor
  - Weekly at a set time
  - 30 minutes to over an hour
- Conference Calls
  - All Interviewers for a project + Available Supervisors
  - Weekly at a set time
  - 30 minutes to over an hour



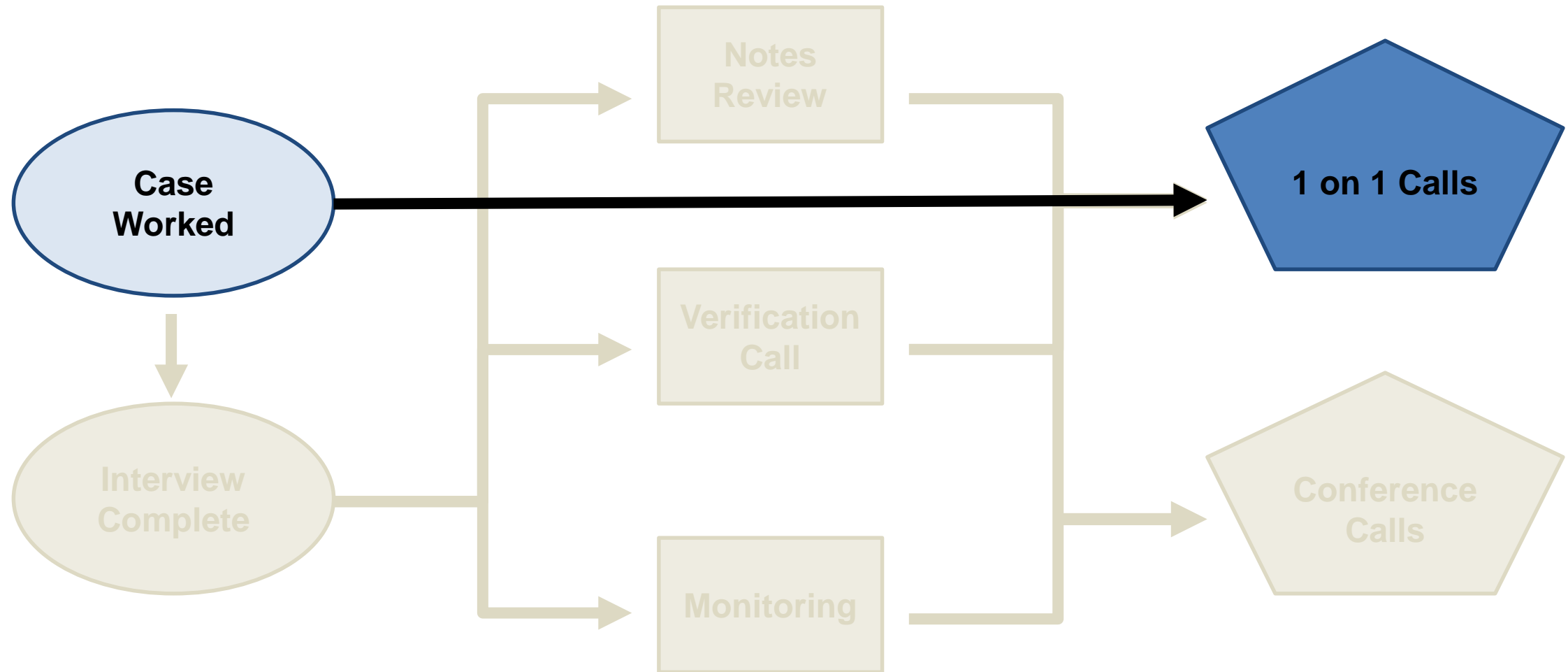
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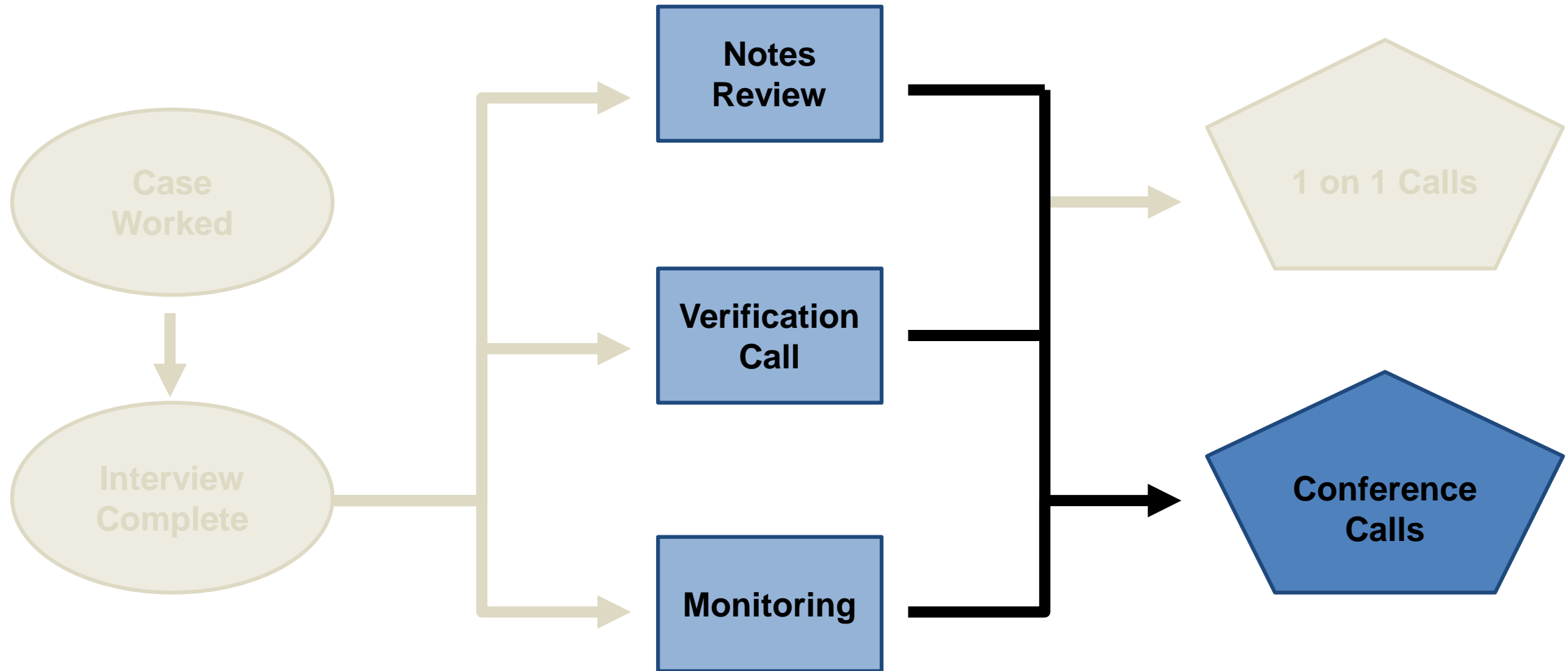
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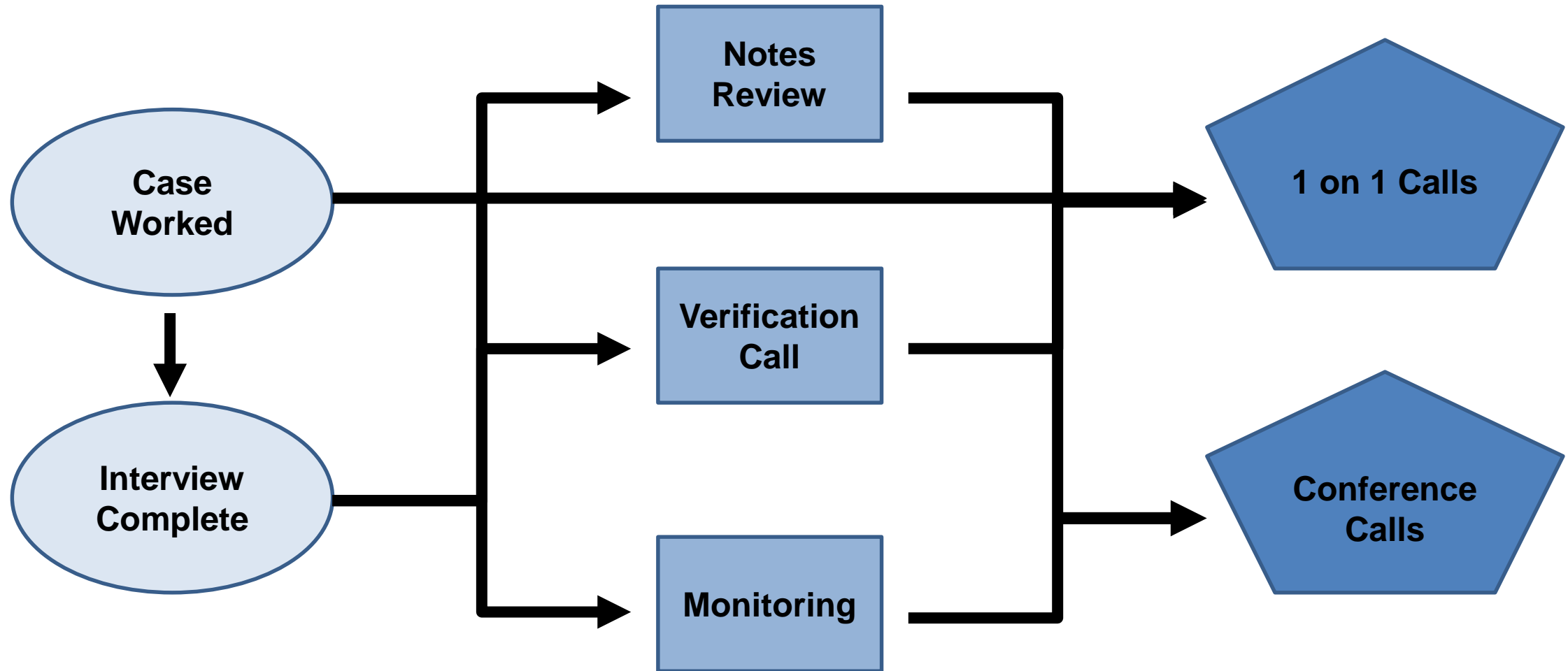
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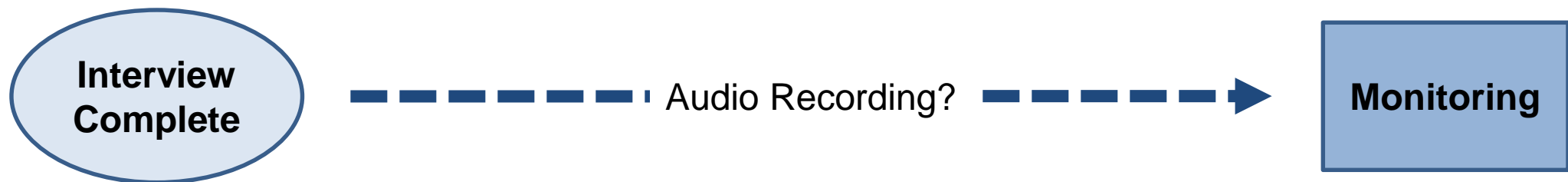
# Forecasting and planning quality control

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- Initial meetings with CAPI Supervisors and Project Director
- Discuss scope of project and develop plan: Which QC methods to use?
- Typical



- Atypical



## Forecasting and planning quality control

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- Frontload monitoring effort
  - 18-25% of completed interviews monitored in initial weeks of data collection
  - Ensure every interviewer delivered feedback in first three weeks
- Average monitoring interviewers 1x per month
  - Varies based on field period & sample size
  - Prioritize those with lower scores
- 10% completed interviews monitored overall by end of field period



# Forecasting and planning quality control

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- Midlife in the United States – Milwaukee Subsample
  - Interviews average over 2.5 hours, the longest being just under 7 hours
  - After full monitoring of first several interviews, shorten the QC Monitoring by sections:
    - Certain sections are mandatory to QC in every monitoring
    - Other sections can be chosen by the person performing the QC

# Forecasting and planning quality control

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- Consolidate reporting into one central location:
  - Project Management Database (PMDB)
- Streamline QC & feedback process
- Better track trends we notice during QC and 1 on 1 calls
- More effectively track when interviewers need re-monitoring

# Looking Ahead

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- Review systems used for quality control to make most effective & efficient

Questions?

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