SurveyTrak 11

Windows 10

Table of Contents

SurveyTrak Overview & Login 3
Launching SurveyTrak 4
Initial View 5
Select Project 5
Sample Tab 6
RCLS Follow Up Column 7
Address Tab 10
Transfer Lines Tab 11
Transferring a Sample ID 12
Transfer History Tab 14
Finalized Tab 15
Case Notes 16
View/Edit 17
Call Info Tab 17
Address Tabs 18
Planner 19
Appointments and Projections 19
Call Wizard 22
Recording a Call or Contact 23
Recording Call with an Appointment 30
Interview 31
Digitally Recorded Interviews 34
Pausing or Stopping the Recording 34
Send/Receive 35
VPN Connection Sequence 35
SurveyTrak Updates 37

Using Find & Sort 40

Lock Columns 42

Filter 43

Edit Menu 44

Letter Request Form 44

Payments 45

Profile 47

Check In (Sample Line) 48

Reports 50

Burn CD/DVD 51

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SurveyTrak Overview & Login

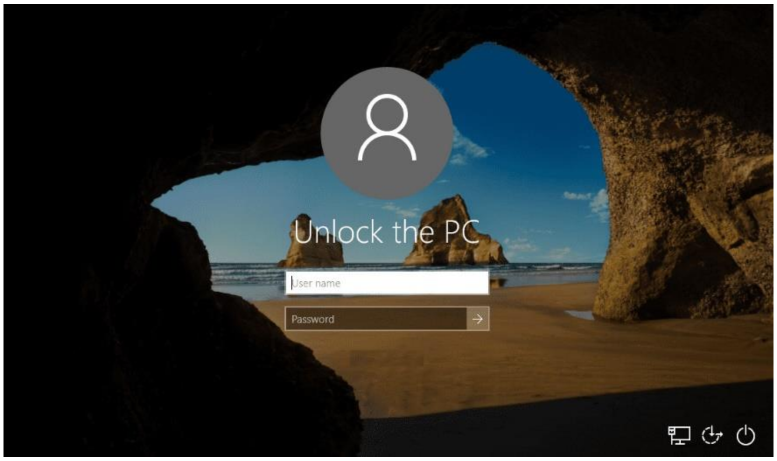
SurveyTrak is a sample management system designed to support your interviewing efforts, as well as those of the survey management team. SurveyTrak performs the following critical functions:

- Delivers sampled households to the interviewer
- Controls entry into the screener and main interview instruments
- Moves other SurveyTrak data from your laptop to ISR
- Transfers completed screener and questionnaire data to ISR

SurveyTrak survey management system is a Windows-based application typically installed on a project assigned laptop computer for field-based interviewers.

Windows Login – After you turn your computer on, the Windows initial screen appears (it displays time and date).

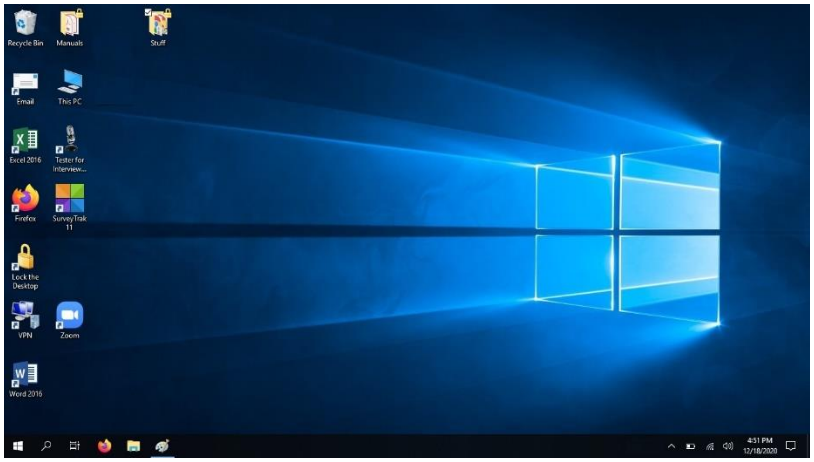
Press any key to bring up the login screen (Unlock the PC).



Enter your 8-digit ID (user name) and password in the password field.

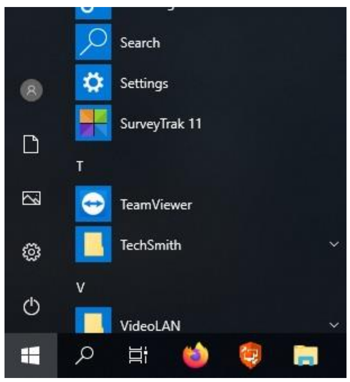
Launching SurveyTrak

After you have entered your password, your Windows 10 desktop will appear.

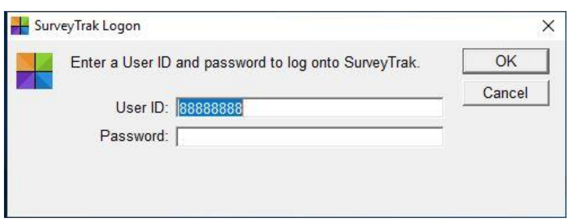


Note the various shortcut icons on your desktop. You can access SurveyTrak in one of two ways:

- Double click on the SurveyTrak icon  on the desktop, or
- Press the  key and scroll down the Start Menu to click on SurveyTrak 11



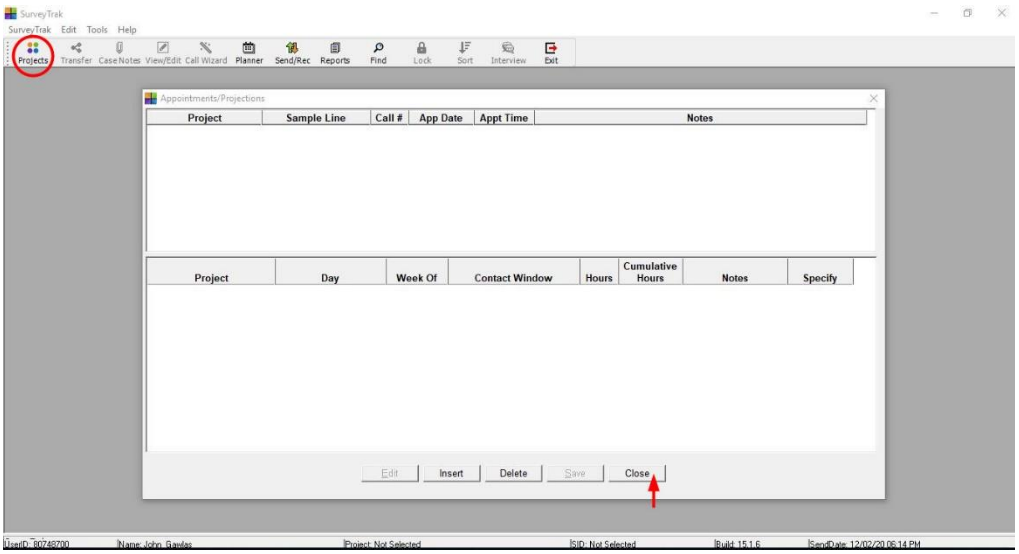
Now the **SurveyTrak Logon** window will appear. Enter the username and password assigned to you. You can find your assigned username and password on the Interviewer ID and Login Sheet that you received with your computer.



After you have entered your password, press the **Enter** key (or click **OK**). Note that the User ID is the same 8-digit you use to login to your Windows desktop.

Initial View

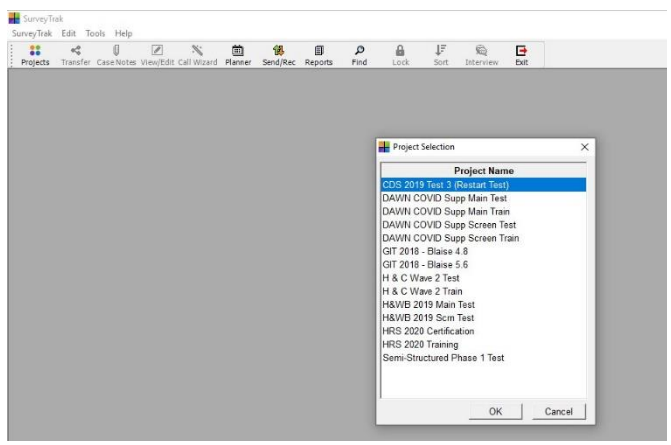
Every time SurveyTrak opens, you will see the Appointments/Projections window appear. You must click **Close** to make the planner disappear before you can open Projects from the SurveyTrak toolbar.



Select Project

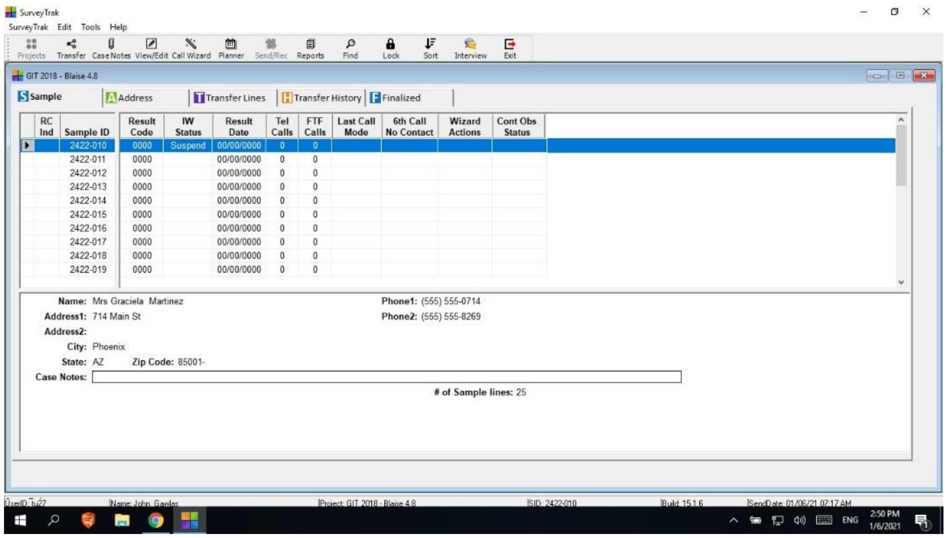
In order to access a particular project in SurveyTrak, you must click the **Projects** button on the toolbar. This will open the Project Selection window (note that the first project in the list will be highlighted).

To select a project, either click on the project name or use your up/down arrow keys to scroll through the selections. Once you have selected the desired project click the **OK** button or double-click on the highlighted selection to open the project.



Sample Tab

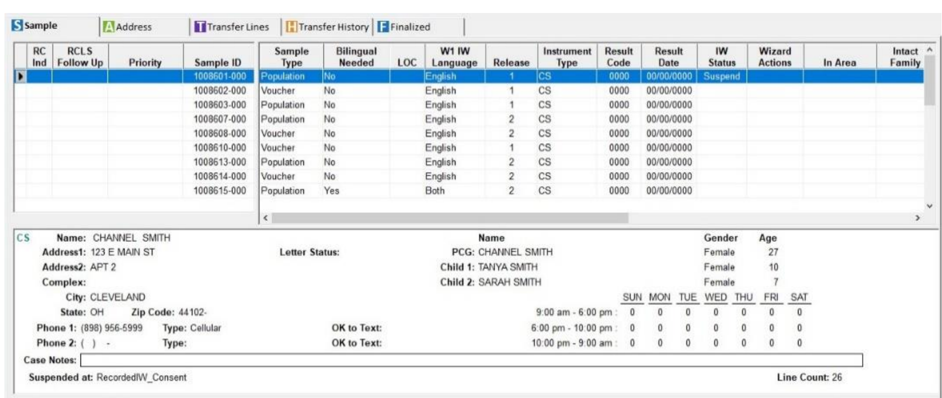
Once you have successfully selected a project, SurveyTrak will open the Project window and default to the **Sample** tab, which lists all of your sample lines and corresponding respondent information for each sample.



Setup and appearance may vary depending on the specific project's needs and requirements. The top half of the project window displays respondent information based on **Sample IDs** – the unique, anonymous identifiers for survey respondents. Column headings denote the different types of information related to each sample ID. You can sort the sample list by clicking on an individual column heading. (For example, clicking on "Result Code" heading will sort numerically by result code.)

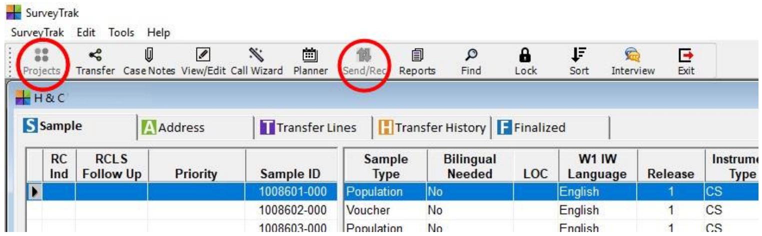
Respondent address information for the selected (highlighted) Sample ID is shown in the bottom half of the window. This section may also include additional specific details that can vary from project to project.

A project may have more column headings than can displayed within the visible project window. In these instances, a horizontal scroll bar below the last listed Sample ID allows viewing these additional column headings. Also notice the vertical scroll (found on the right of the last viewable column) that allows you to scroll up and down to view the entire list of Sample IDs.



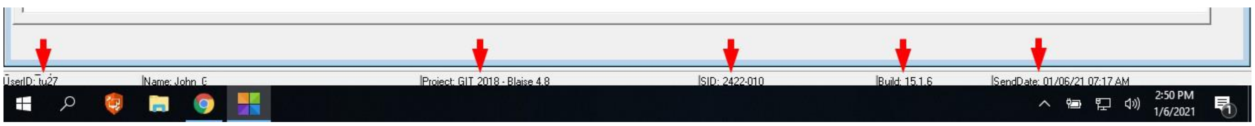
SurveyTrak

When a project is open, you will see toolbar selections available at the top of the SurveyTrak window except for the grayed out **Projects** and **Send/Rec** that are inactive.



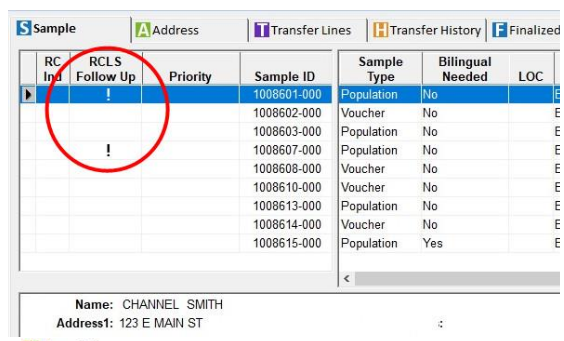
Should you need to do a Send/Receive (Send/Rec), you will have to close the project window by either clicking **Exit** on the toolbar or clicking on the red **X** in the upper right hand corner of the project window.

At the bottom of the SurveyTrak screen, your UserID, Name, Project, the highlighted SID, Build and Last Send Date are displayed.

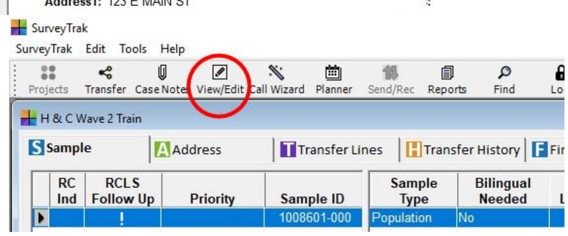


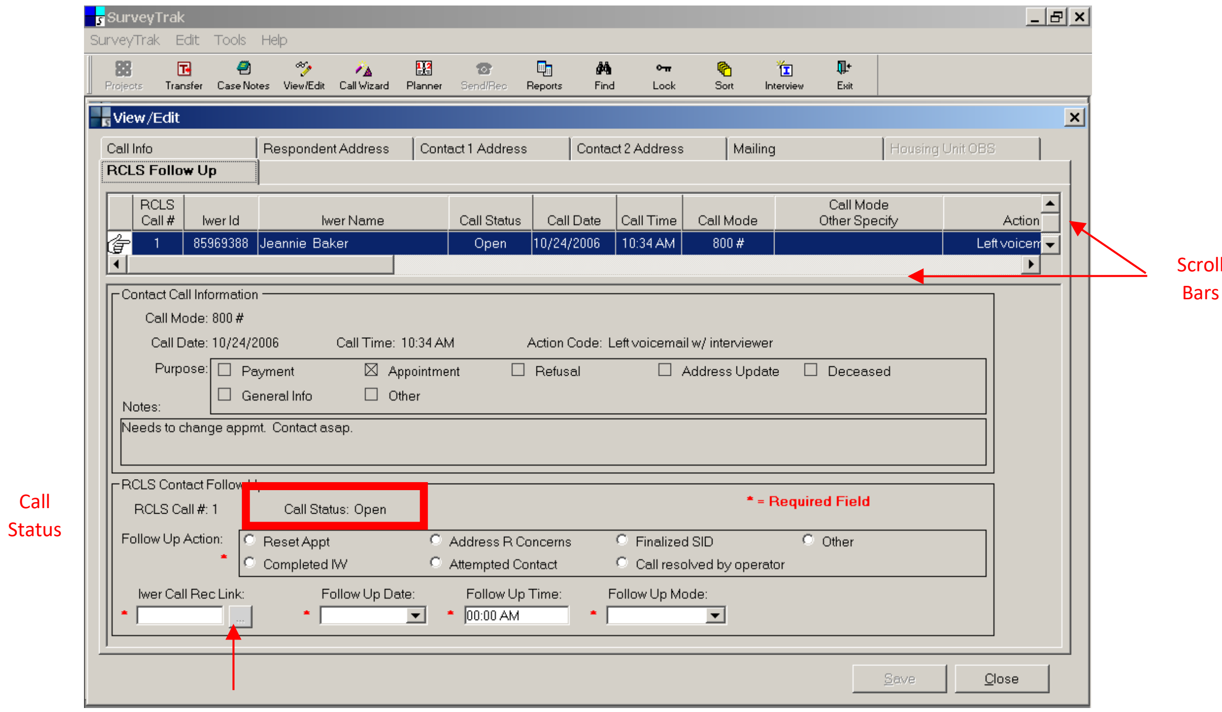
RCLS Follow Up Column

A column on the **Sample** tab to note is Respondent Contact Logging System (RCLS) Follow Up. Respondent calls received at the central office are logged in the RCLS application. If they receive a call from one of your sample IDs, you will get an e-mail notification of the call. In order to view the call in SurveyTrak, you will need to complete a Send/Receive. Once the S/R is complete, an exclamation point will be visible in the "RCLS Follow Up" column under that sample ID number on the **Sample** tab.



To view the call information, click the **View/Edit** button while the sample ID line is highlighted. This takes you to the **View/Edit** tabs, where you will choose the **RCLS Follow Up** tab.





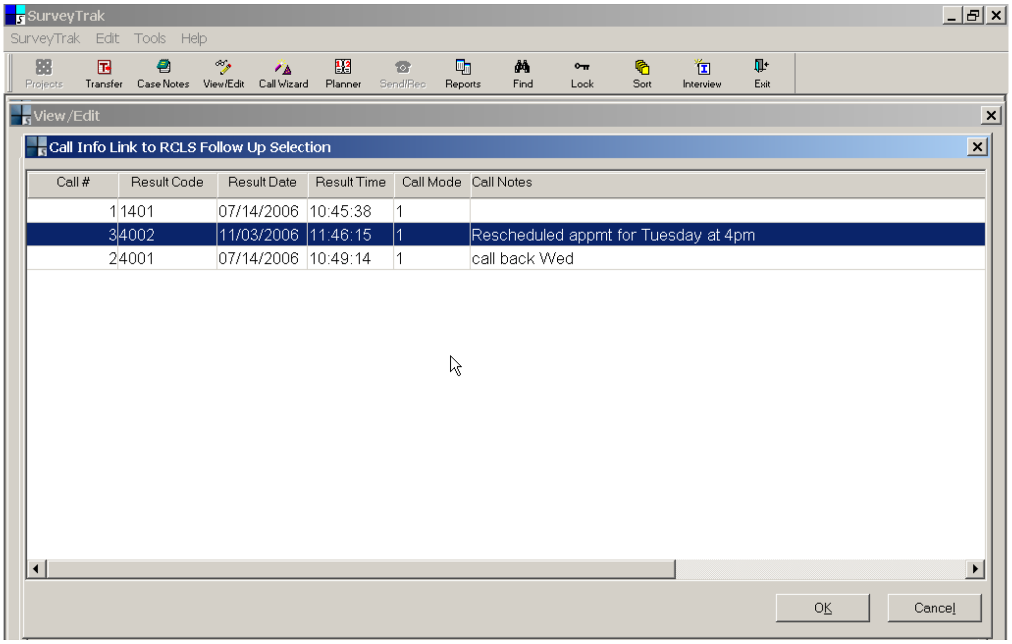
There are three sections to the **RCLS Follow Up** tab:

The top section is a table containing information about the call. Note the scroll bars at the right and bottom of this section. The scroll bars allow you to view multiple calls (if applicable) and additional columns not seen in the window.

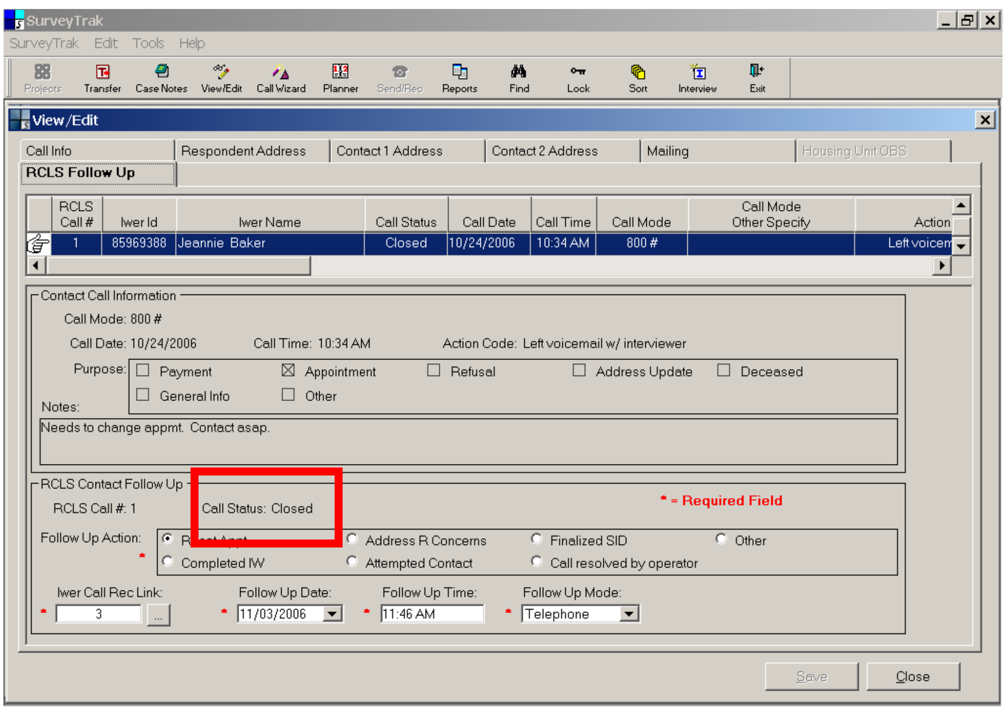
The middle section, **Contact Call Information**, provides a quick glimpse of the call. The central office staff enters this information when a respondent calls the toll free number. In the “Notes” box, the operator will enter any action that is required of the interviewer.

The **RCLS Contact Follow Up** section, at the bottom, is where you will input your follow up actions regarding the call. As always, first record any contact with the respondent in the Call Wizard. Once you have recorded your information there, complete the required fields (red asterisks) in this RCLS Contact Follow Up section. If you select “Other” for the follow-up action, you will be required to enter the specifics of that action.

If you click on the **box** on the right of the **Iwer Call Rec Link** field, you can view all call records related to this sample ID (see next page).



Select and highlight the call record that corresponds to the action you have taken to close the call and click **OK**. Once you have selected the call record that corresponds to the follow-up action, the date, time and mode will automatically fill with the information from the call record. When you have completed the follow-up actions, click the **Save** button on the **RCLS Follow Up** tab. Once you save the follow-up action, you will not be able to go back into the call and make changes.



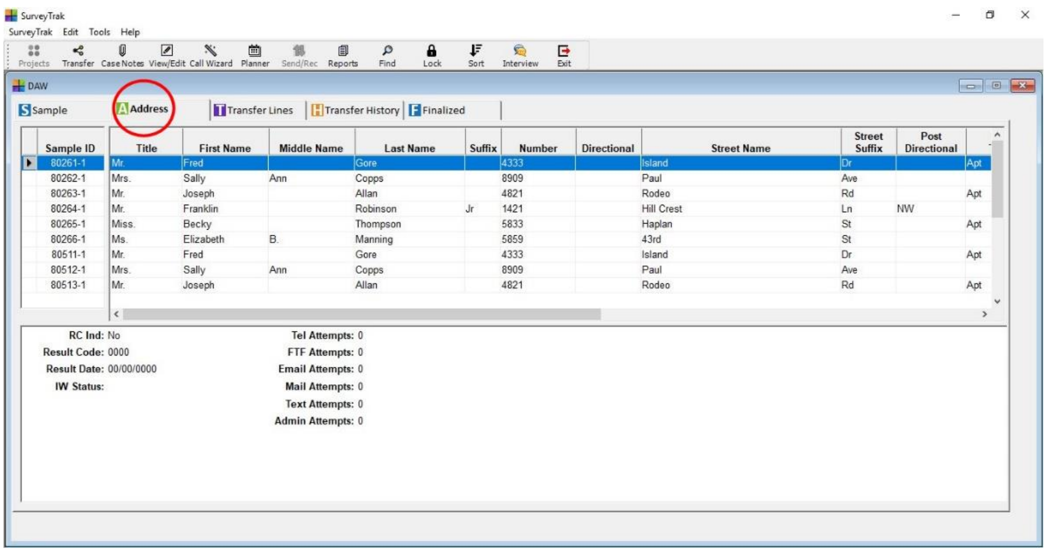
Note that the Call Status indicates "Open" before you input any information. After you complete your follow up, the Call Status changes to "Closed" and the exclamation mark is removed from the RCLS column on the **Sample** tab.

If a respondent calls the toll free number, but no follow-up action is required on your part, you will still receive an e-mail notification of a call, but there is no exclamation point in the RCLS Follow Up column on the **Sample** tab. This indicates that the call has been resolved, and there is no follow-up required by you. You will be able to view the call in View/Edit, on the RCLS Follow-Up tab. Additionally, you may see two or more exclamation points on one sample ID in cases where the caller has phoned more than one time or you have not completed your follow-up for previous calls.

Address Tab

You can access the **Address** tab simply by clicking on that tab in the project window. The **Address** tab lists the address information for each Sample ID. The setup of the **Address** tab is the same as the **Sample** tab except that the column headings list address information instead of contact information.

Note*: The column headings on the* ***Address*** *tab may vary from project to project.*



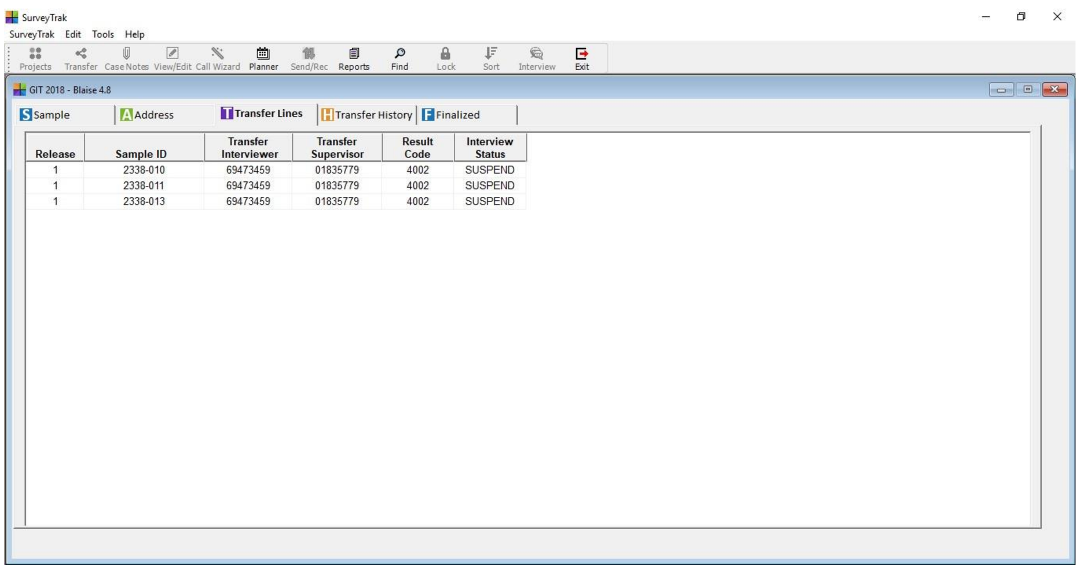
Notice that the lower section of the **Address** tab displays information found in the column headings on the **Sample** tab. Information shown here will also vary from project to project. When moving between the **Sample** and **Address** tabs, the same Sample ID remains selected. If you select Case Notes from the toolbar, the case notes for the selected (highlighted) Sample ID will be displayed.

SurveyTrak

Transfer Lines Tab

The **Transfer Lines** tab will display any Sample IDs that are ready to transfer to another interviewer (or your TL) on your next send/receive transmission. Notice the different column headings including:

- Release
- Sample ID
- Transfer Interviewer
- Transfer Supervisor
- Result Code
- Interview Status



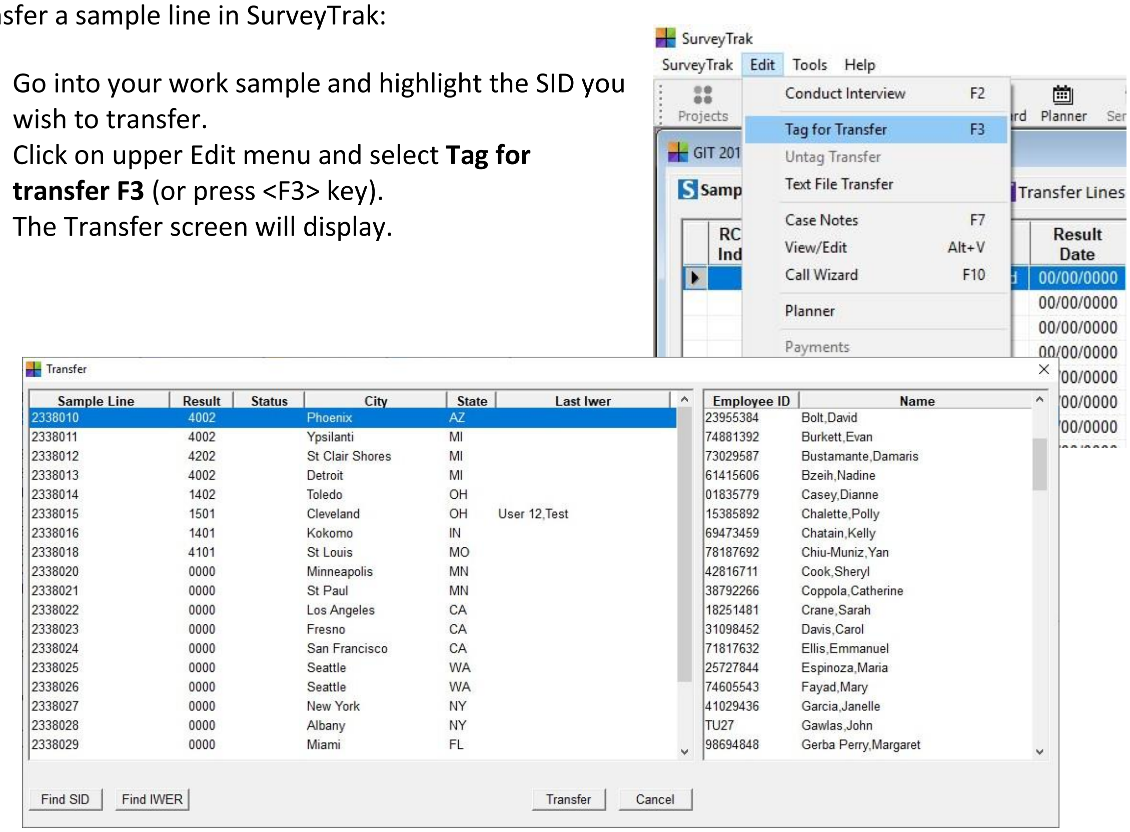
The sending and receiving interviewers **must each** complete a Send/Receive in SurveyTrak before the transferred line will be in the receiving interviewer's sample. Please review the next page for the actual process of selecting and transferring a Sample ID.

Note: The transferred line will be available for the receiving interviewer ***approximately 1 hour after*** the sending interviewer completes the communication.

Transferring a Sample ID

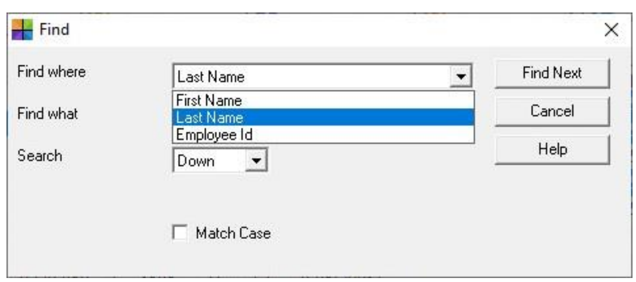
To transfer a sample line in SurveyTrak:

1. Go into your work sample and highlight the SID you wish to transfer.
2. Click on upper Edit menu and select **Tag for transfer F3** (or press <F3> key).
3. The Transfer screen will display.

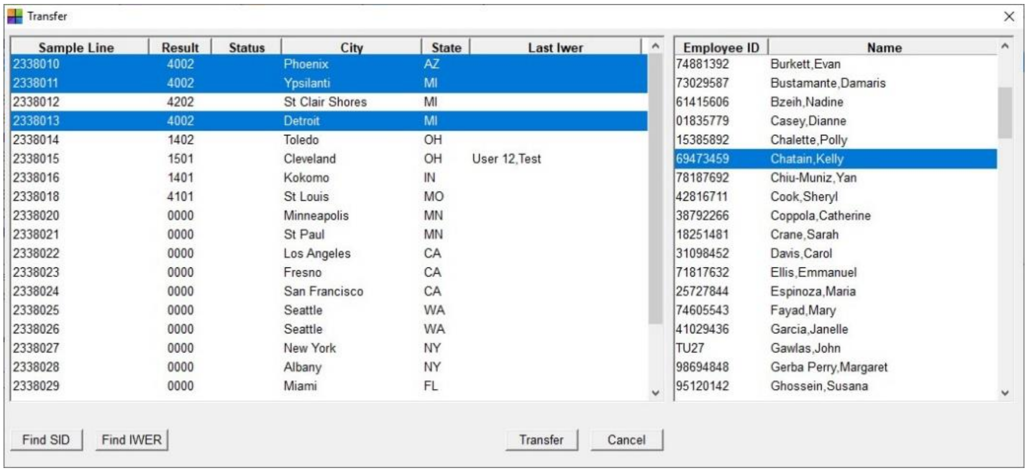


In this screen, the box on the left shows the SID you have selected to transfer. You can also include additional SIDs in this screen by holding down the <Shift> key and using the arrow on your keyboard to go down or up to highlight more SIDs. There is also a **Find SID** button that allows you to search via result code or sample line for SIDs to transfer.

To find the person to transfer to, click on **Find IWER**, and you will then see the following screen.



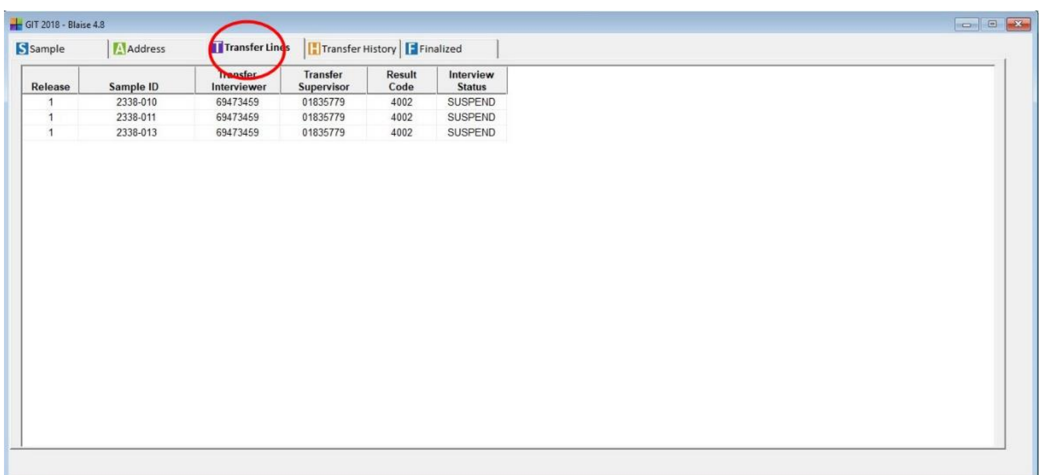
You can search by Employee ID, First Name or Last Name. Once you have located the interviewer you wish to transfer the line to, click **Cancel**.



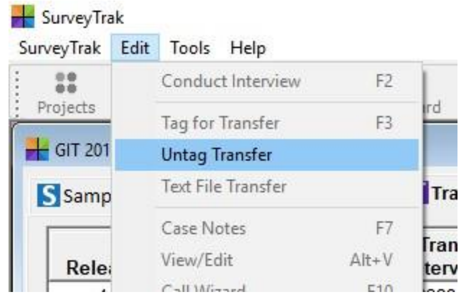
Now you see the Transfer window with the Sample Line highlighted as well as the intended receiving interviewer. Click the **Transfer** button, and you will be asked to confirm the SID number and person it will be transferred to.

Click **Yes** to proceed.

You can now go back and review the Transfer Lines tab to confirm which Sample IDs are ready for transfer. If you have selected a sample in error, see next page for ***Removing a Sample ID from Transfer***.



Removing a Sample ID from Transfer – When reviewing the **Transfer Lines** tab, if a Sample ID has been selected for transfer in error, follow the steps below.



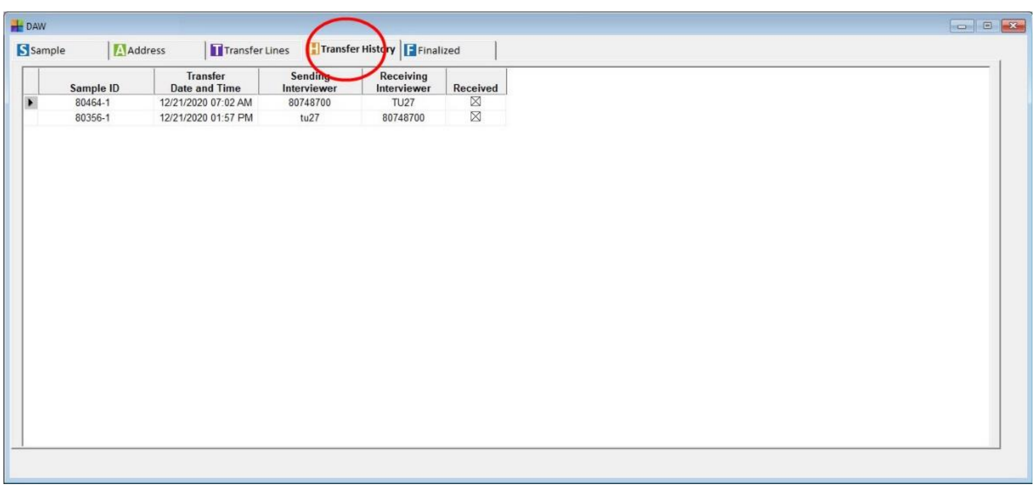
1. Highlight the Sample ID you wish to untag on the **Transfer Line** tab.
2. Click on the Edit menu.
3. Select the **Untag Transfer** option.
4. A prompt will pop up asking to confirm the untag.
5. Click on **Yes**.
6. The Sample ID will now be removed from the **Transfer Line** tab and will be displayed on the **Sample** tab.

Transfer History Tab

The **Transfer History** tab lists a history of the transferred lines that you have received and sample lines you have transferred to another interviewer.

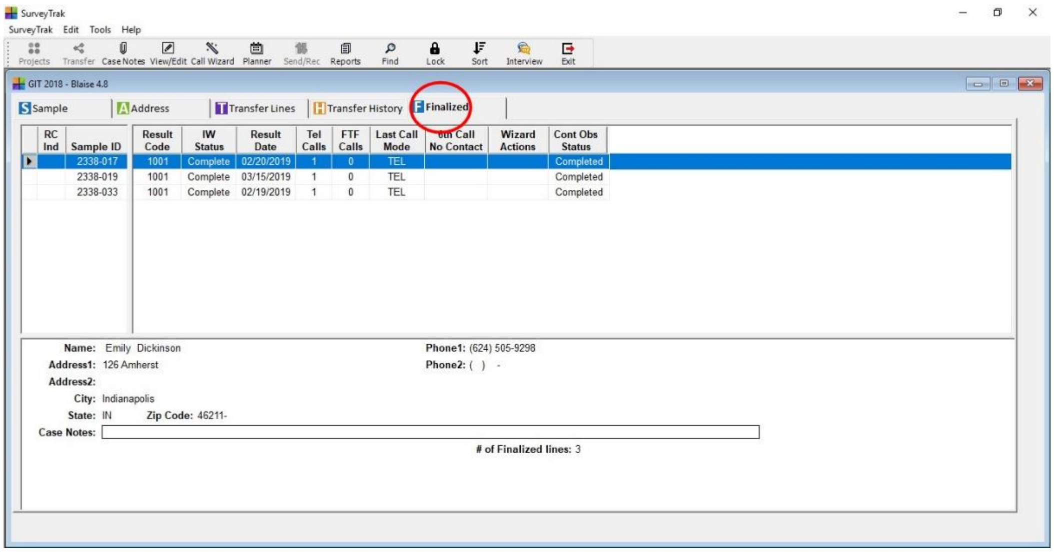
Once a transfer is received, SurveyTrak returns a "received" flag to the sending interviewer. Following your next send/receive, an 'x' will appear in the box in the received column to signify that the transfer was received.

You can sort this list by clicking on any heading (Sample ID, Receiving Interviewer, etc.).



Finalized Tab

Once a SID is completed with a finalized code, it will go into the **Finalized** tab and not be in the **Sample** tab any longer. The column headings are the same as in the sample screen, with a few additions, based on project needs.

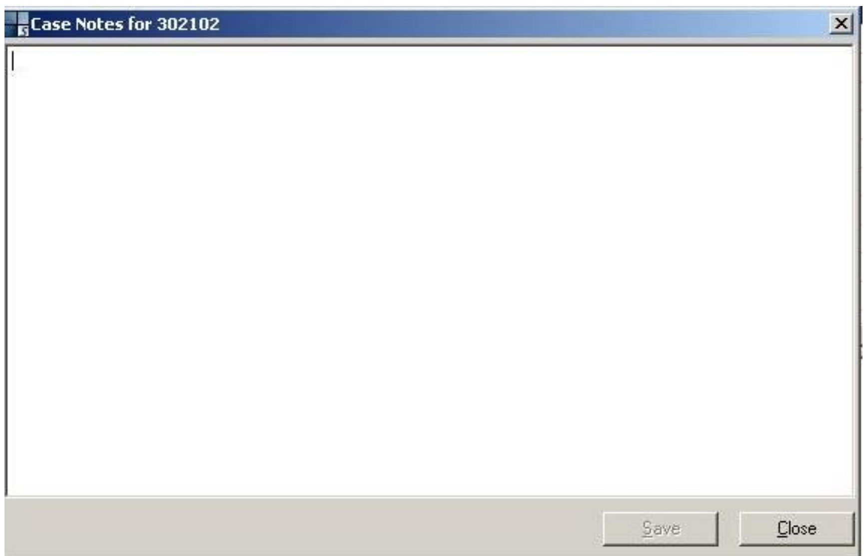


Tip: If you cannot find a recent sample line in your Sample tab, you can check for it in the Finalized tab (especially if it was a completed IW or final refusal).

Case Notes

You will use Case Notes for any additional information or details that you would not enter in the call record. Use them to quickly get the status of a given Sample ID from the project window. To enter a case note, follow the steps below.

1. Highlight the desired Sample ID on the **Sample** tab.
2. Click the **Case Notes** button from the toolbar or press the **<F7>** key on the keyboard. The Case Notes screen should now be displayed.
3. Once you have entered your text in the text field, save by clicking on the **Save** function.
4. To return to the project window, click **Close**.



The case note information appears below the address in the lower window of the **Sample** tab.

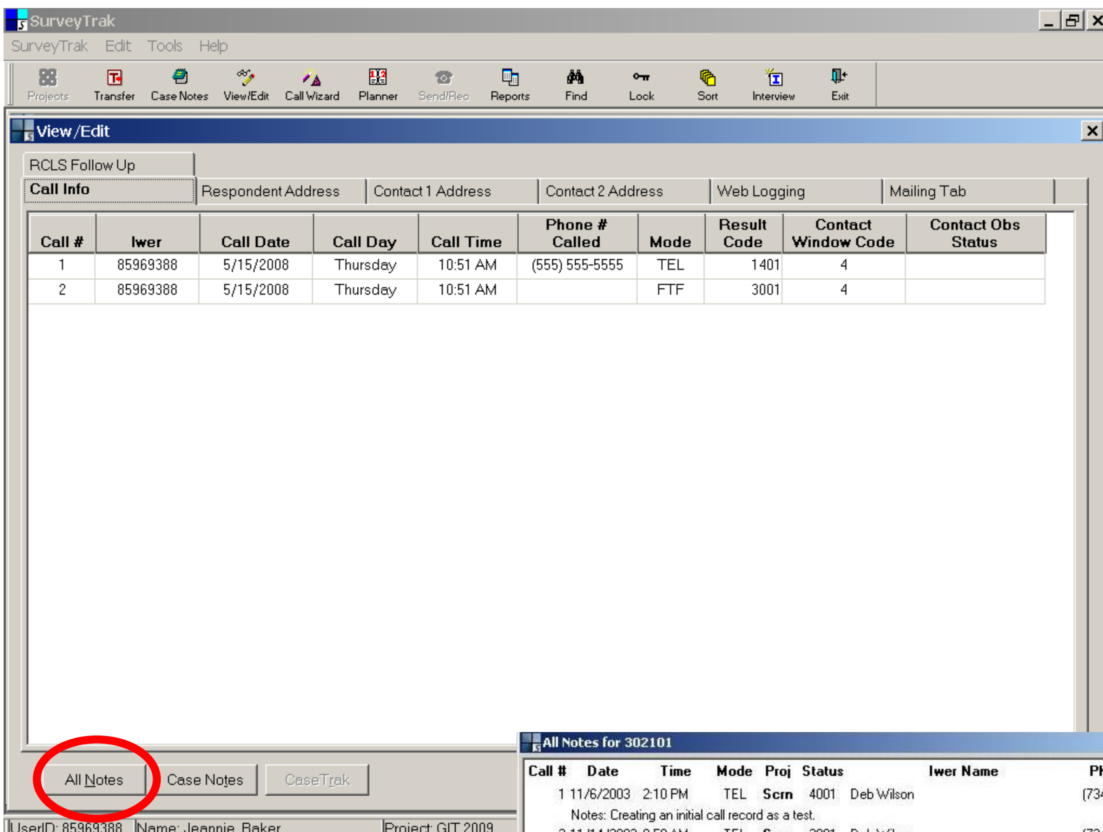
View/Edit

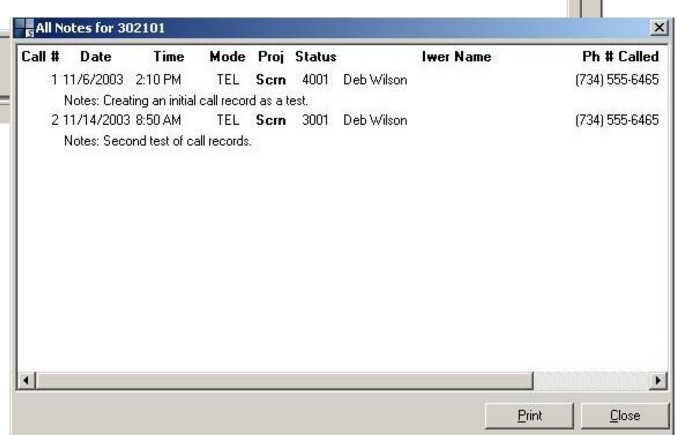
The View/Edit function is used to update respondent and contact address information for Sample IDs. The tabs available vary depending on the needs of the project. The first step in using the View/Edit function is selecting the desired Sample ID from the **Sample Line** or **Address** tab. Once the Sample ID you want to edit is highlighted, access the View/Edit function by one of the following:

- Click the **View/Edit** button on the toolbar
- Double click on the Sample ID.

Call Info Tab

Each time you enter the View/Edit function, the **Call Info** tab will display, which allows you to view (but not edit) the calls you have previously entered for this Sample ID.

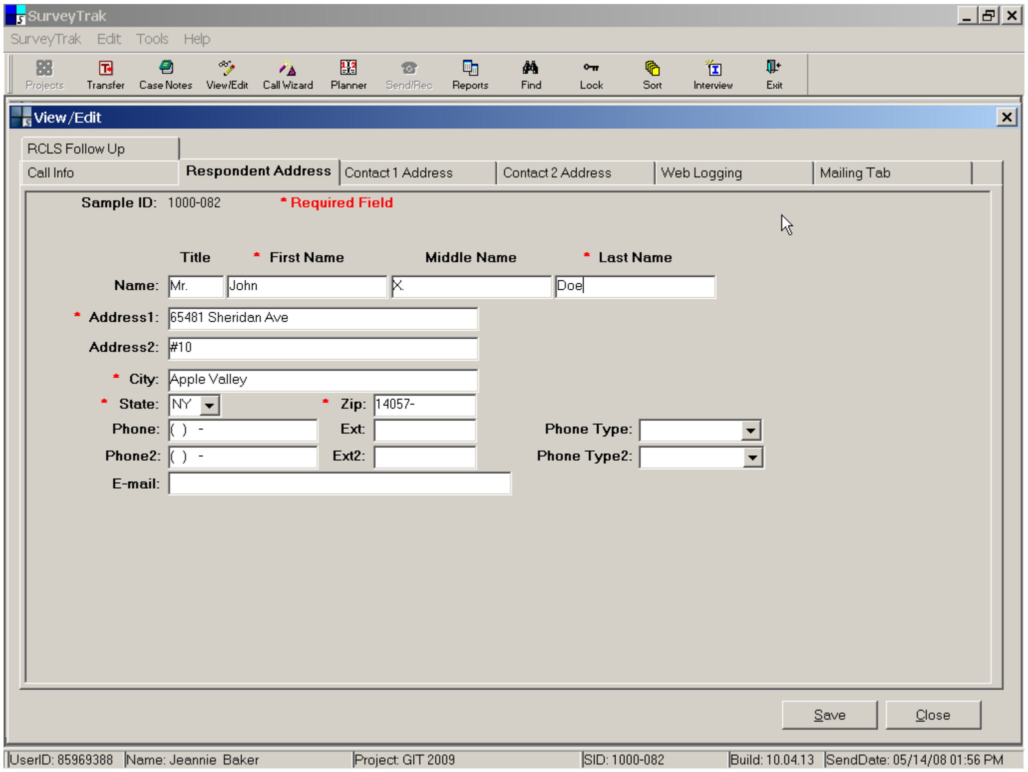




The **All Notes** button on the lower left of the Call Info tab allows you to view all of the calls and call record notes entered by you for this respondent. Remember, this is only for viewing notes – to edit and enter calls, you must access the Call Wizard function from either Sample or Address tabs.

Address Tabs

Depending upon the project, there may be multiple address tabs displayed for the sample ID you have selected (such as physical address, mailing address, contact address, etc.). You may edit this address information in this window. Click into the field that you wish to edit and make the appropriate changes. Remember to click on the **Save** function along the bottom of the window before closing.



If you do make changes on the View/Edit tabs and click on **Close**, SurveyTrak will prompt you with message "Changes are made to this tab, do you wish to save?"

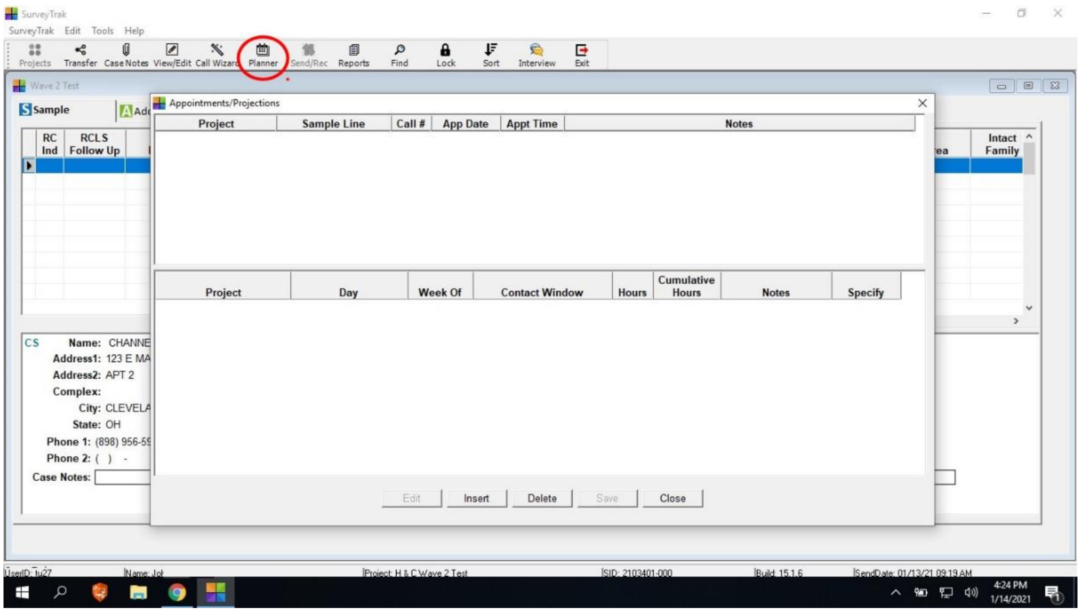
To exit from the View/Edit function, click **Close**.

Planner

The Planner feature displays appointments or commitments that have been recorded for Sample ID's in the Call Wizard. Additionally, interviewers will enter weekly work hour projections here. Every time you initially open SurveyTrak, the "Appointment/Projections" screen will pop up.

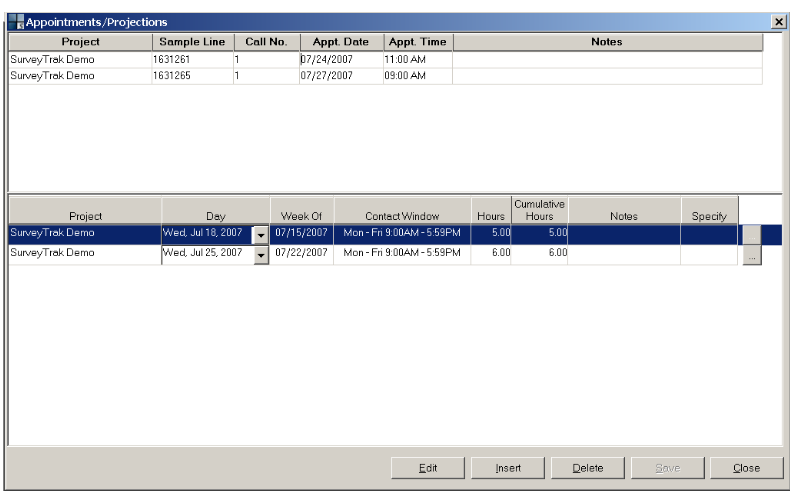
Here are two ways to directly call up the Planner:

- Click the **Planner** button on the toolbar
- Select "Planner" from the upper **Edit** menu



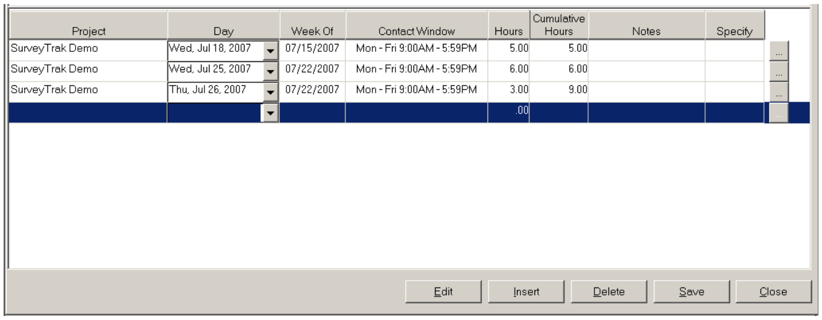
Appointments and Projections

The planner window show both appointments (top half) and the Interviewer work projections (lower half). Appointment entries are the result of result codes in the Call Wizard. Appointments for the next three weeks appear – note that these entries cannot be edited in this window (enter changes via Call Wizard).



SurveyTrak

Entering New Projections – Interviewers submit weekly time projections for each project they are currently working. Please be aware that it is important to enter projections. To enter a new time projection, click **Insert** and a new line will appear.



Project	Day	Week Of	Contact Window	Hours	Cumulative Hours	Notes	Specify
SurveyTrak Demo	Wed, Jul 18, 2007	07/15/2007	Mon - Fri 9:00AM - 5:59PM	5.00	5.00		
SurveyTrak Demo	Wed, Jul 25, 2007	07/22/2007	Mon - Fri 9:00AM - 5:59PM	6.00	6.00		
SurveyTrak Demo	Thu, Jul 26, 2007	07/22/2007	Mon - Fri 9:00AM - 5:59PM	3.00	9.00		
				.00			

Project — Select the appropriate project from this drop-down menu of projects assigned to the interviewer.

Day — The interviewer selects the day from a calendar pop-up. The day will be recorded in this format: Wednesday, July 25, 2007.

Week Of — The data collection week is automatically entered based on the calendar day selected.

Contact Window — Use the drop-down menu to choose which calling window you will be working in. The options are:

- Sun – Thur 6:00PM – 9:59PM
- Fri – Sat 6:00PM – 9:59PM
- Sat – Sun 9:00AM – 5:59PM
- Mon – Fri 9:00AM – 5:59PM
- Sun – Sat 10:00PM – 8:59AM

The interviewer should only choose one call window (even if the block of time the interviewer will work extends into another call window). The interviewer should choose the call window that reflects the window in which work will start.

Hours — Enter the number of hours the interviewer is going to work within the chosen call window on the selected day.

Cumulative Hours — This column sums the hours entered on the preceding rows and the current row in a given week by project.

Notes This is a drop-down menu which allows the interviewer to note why projections may be less or more than expected. Options include:

- Illness/Injury/Medical
- Personal
- Vacation
- Weather
- Other (pops up a window in which you enter the reason)

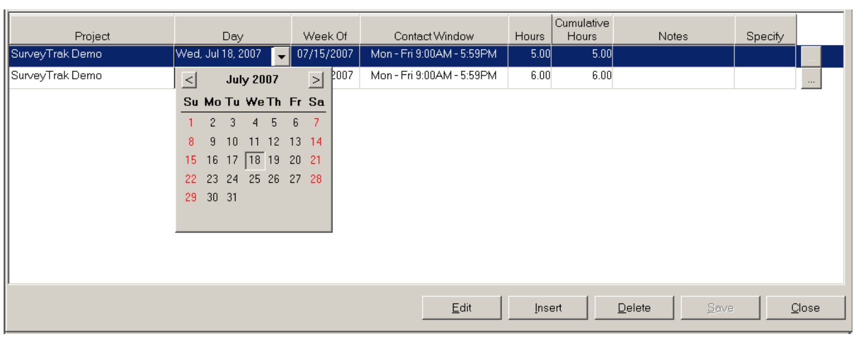
Specify If "Other" is selected under the Notes column, the reason you enter in the pop-up box is displayed here. You may use the Specify field to provide additional information to the Notes field (for example, "travel dates are 7/21 through 7/28"). To see the entire explanation, click the button next to the row.

Please note: *sensitive/personal details should not be included in the Specify field.*

Click the **Save** button at the bottom of the screen when you have completed each entry. If you enter a line in error, highlight the line and select Delete. Once projections are complete and no further edits are needed, click **Close** to exit this screen.

Tip: You may enter multiple projections for a single day to represent work across more than one project.

Editing Projections – If edits to previously entered projections are needed, the interviewer can highlight the row and click **Edit** to make changes. You may change projections for the current and future dates but note that past projections cannot be modified.

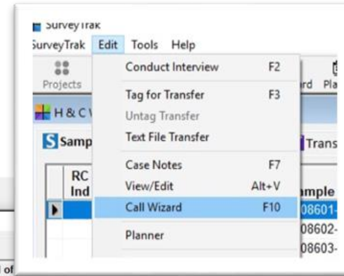


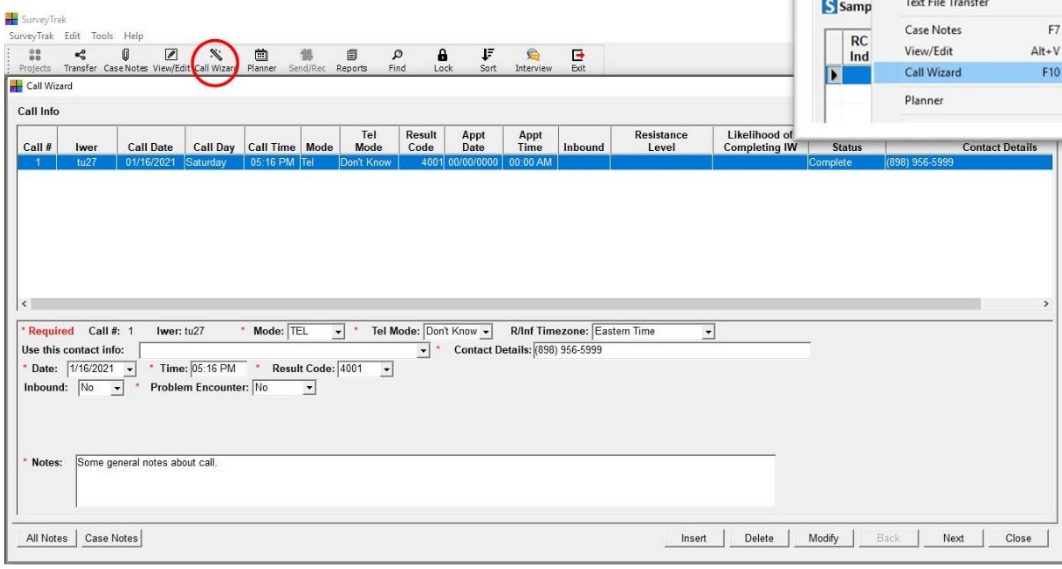
Once you have made your edits, click **Save**. To exit the Planner window, click **Close**.

Call Wizard

The Call Wizard is used to enter calls or contact attempts that you have made to respondents. Like the View/Edit function, first step is selecting (highlighting) the desired Sample ID. Once selected, you can launch the Call Wizard in one of three ways:

- Click on the **Call Wizard** button on the toolbar
- Select “Call Wizard” from the upper **Edit** menu
- Press the **<F10>** key





All Notes — Used to view all the Call Record Notes for the particular Sample ID. Note that this is similar to the ALL NOTES function found in the View/Edit function.

Case Notes — Used to view Case Notes written for this Sample ID. You can use this button to add a case note from within the Call Wizard.

Insert — Adds a new call record line. You may not enter calls out of date and time order. Valid data must be entered in both the Mode and Result Code fields before SurveyTrak will let you save and continue through the Call Wizard.

Delete — Used to Delete a call record line entered in error. You may only Delete the last call record for a Sample ID.

Modify — Used to make changes to the last call record.

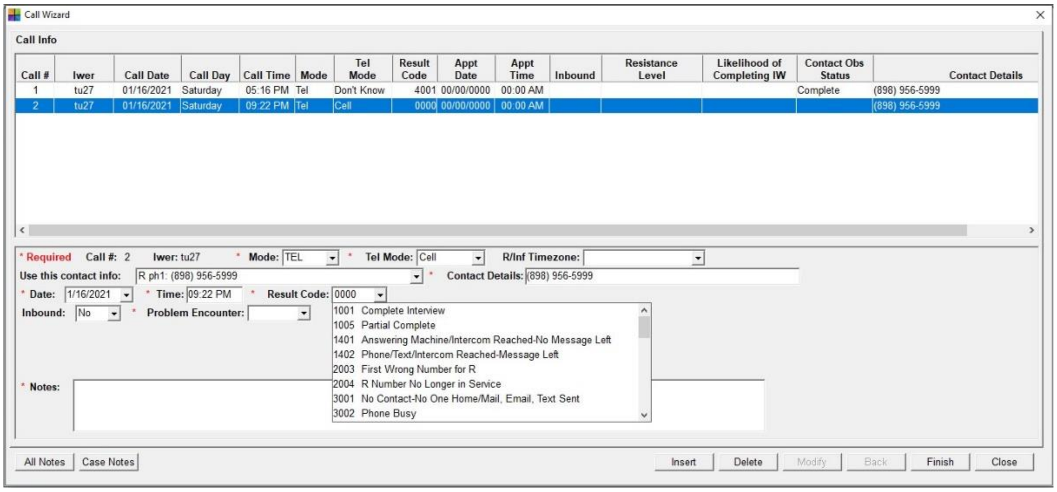
Back — Returns you to the previous screen.

Next — Takes you to the next screen.

Close — Terminates the Call Wizard, closes the Call Info box and returns to the Project window. This function is primarily used at the completion of an interview to avoid entering Interviewer Observations screen while with the Respondent.

Entering a Call Note or Contact

1. Highlight a Sample ID on the Sample Lines tab and click on the **Call Wizard** button on the toolbar.
2. Click on the **Insert** button. A new Call Record line is inserted (see below).

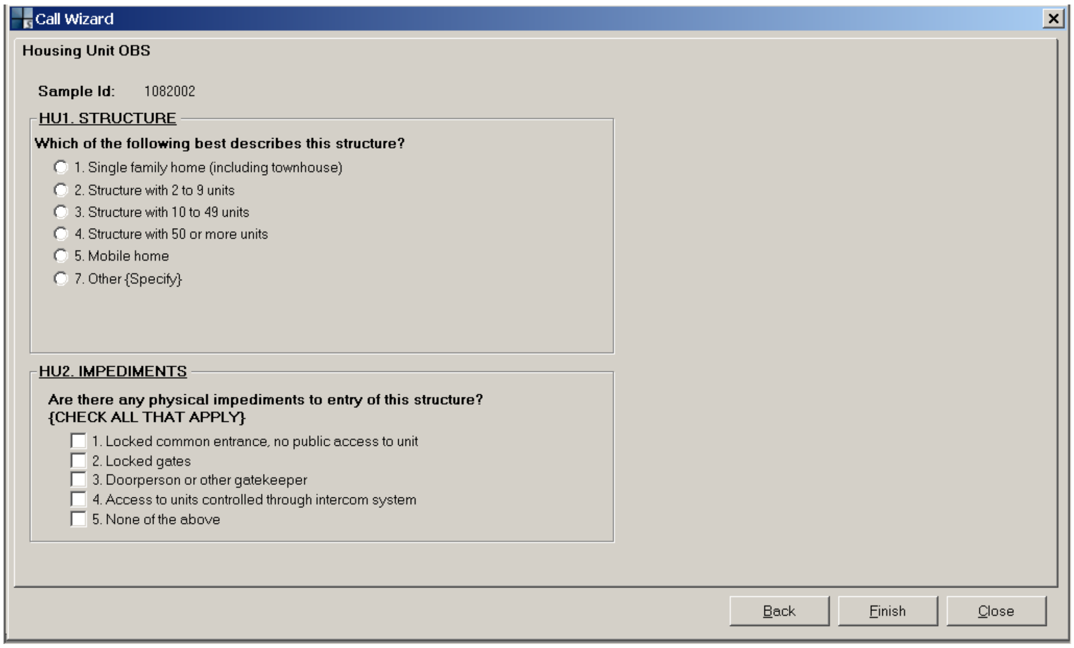


3. Click into the **Date** field to change the date (if necessary).
4. Click into the call **Time** field only if you wish to change from the current time. To change AM or PM, you must type “A” or “P” over the one you wish to change.
5. Click into the **Mode** field to select the appropriate mode: FTF (face-to-face) or TEL for telephone (if TEL then you will see Tel Mode field appear).
6. Click into the **Result Code** field to select the appropriate result code. Choose the appropriate code from the drop-down list of selections.
7. Click into Note field and type your note for that call.
8. Click the **Next** button to continue with the Call Wizard.
9. Depending on the result code that you entered, the wizard will determine whether you have other wizard actions to complete. If the result code you have entered does not require further action, click the **Finish** button to close the Call Wizard and return to the project window.

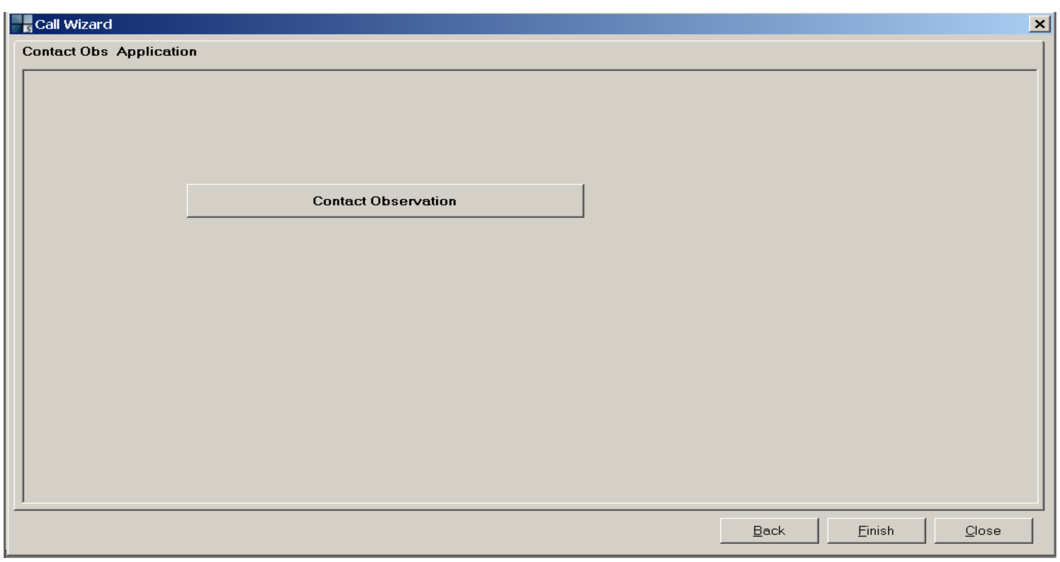
If the Result Code you have entered does require further wizard action, you will need to complete one or more of the following observations. (See next page.)

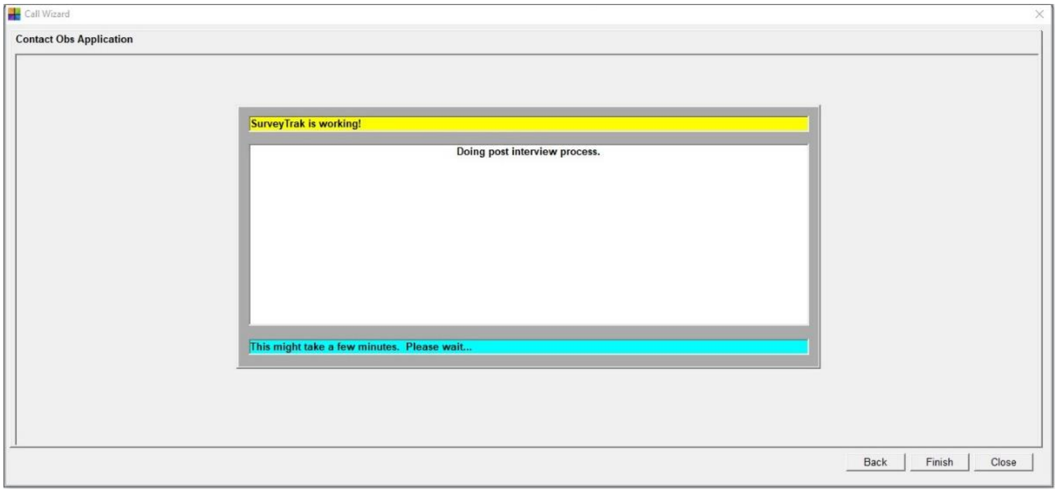
Please note that these observations may be project-specific and used differently than the example depicts.

Household Observations – Asks you to complete Housing Unit Observations when you record a face-to-face contact. Answer the two questions and click Next or Finish (again, depending on your result code) when completed. As above, Finish returns you to the project window.

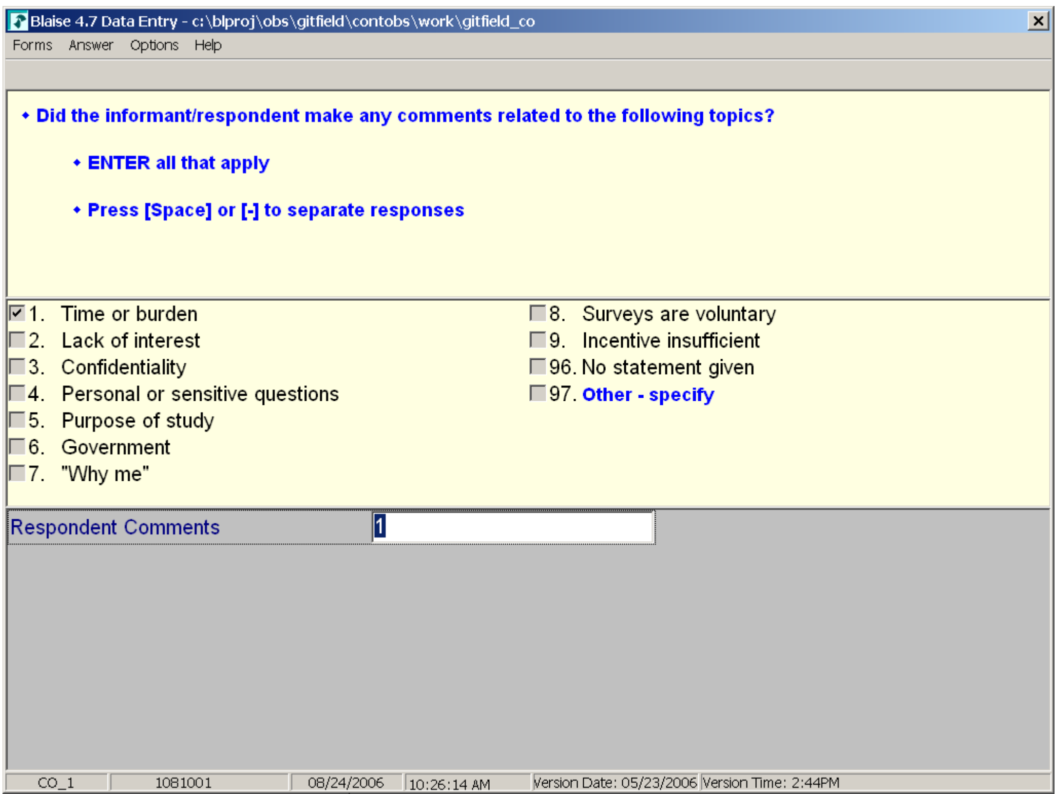


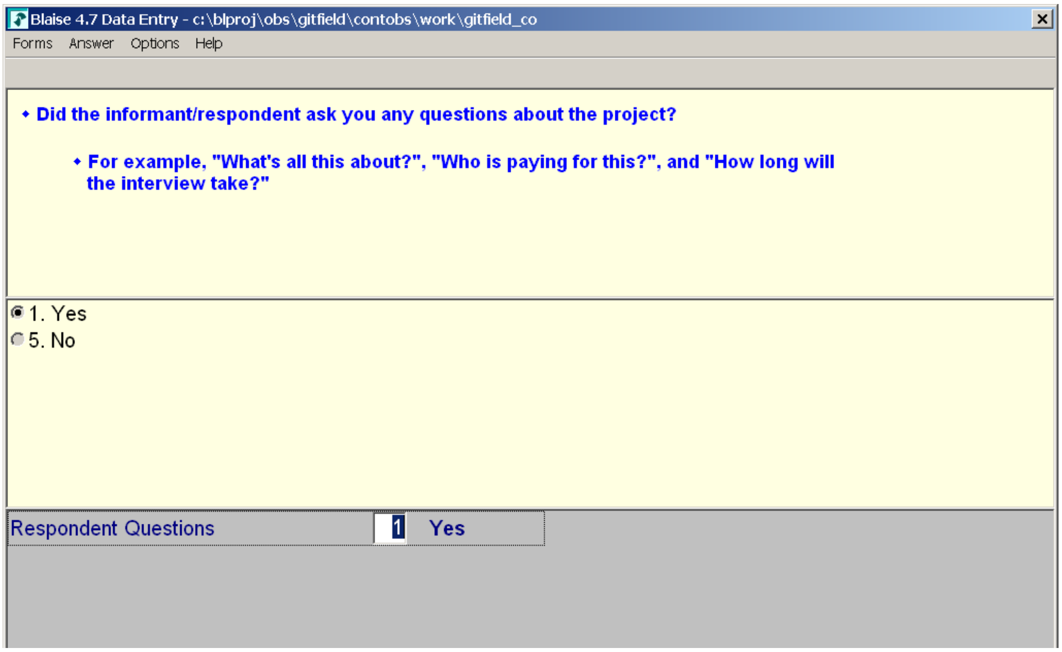
Contact Observations – If you have made contact with a Respondent or Informant, you will be directed to complete a Contact Observation. Click on the **Contact Observation** button to continue and answer the questions as indicated.



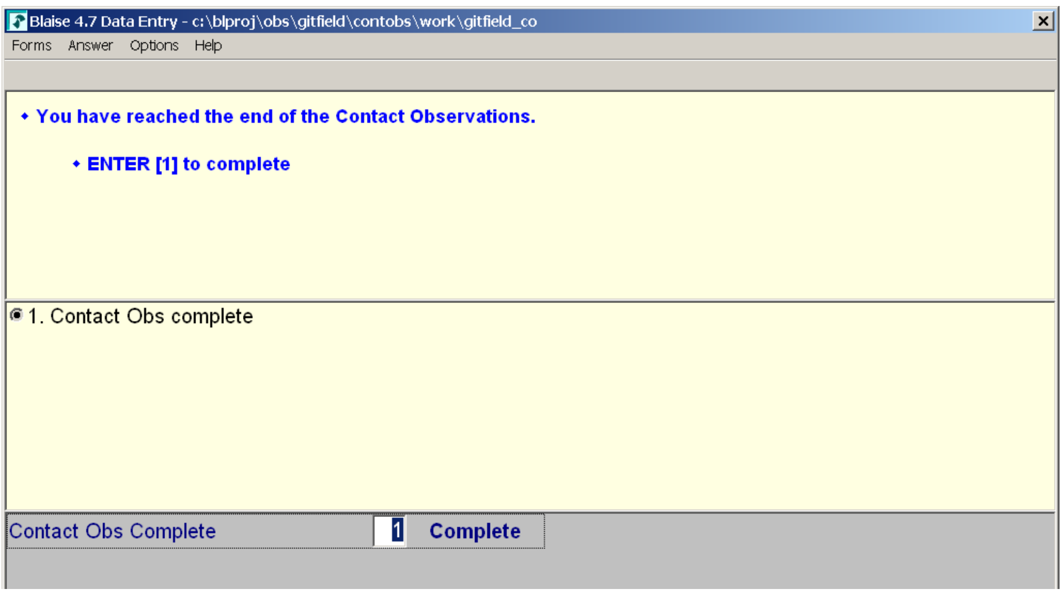


After clicking the Contact Observations button, the Blaise instrument launches automatically ("Doing the post interview process") and presents a series of questions.

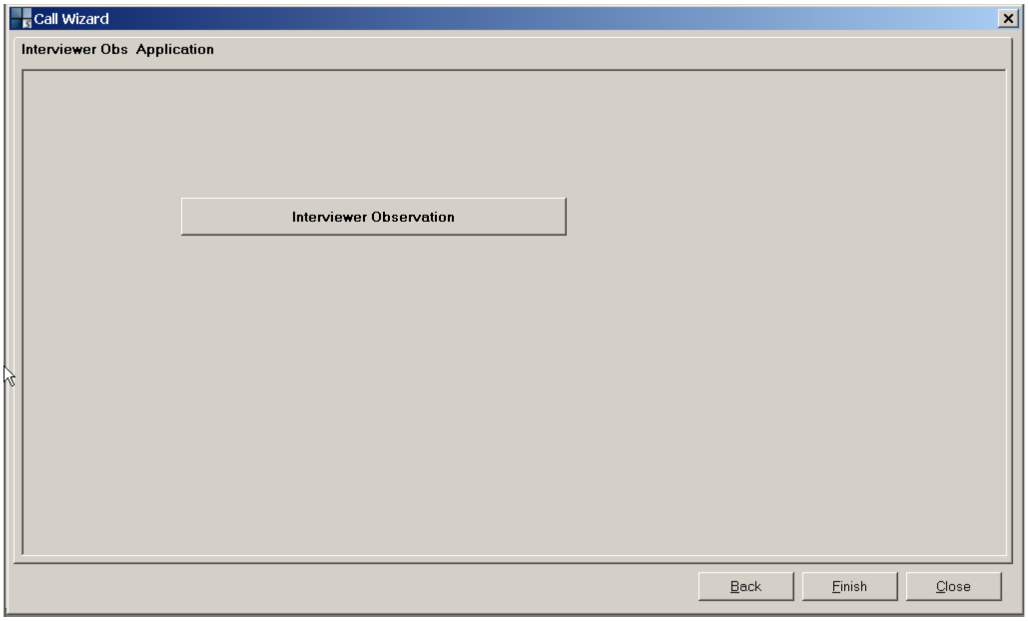


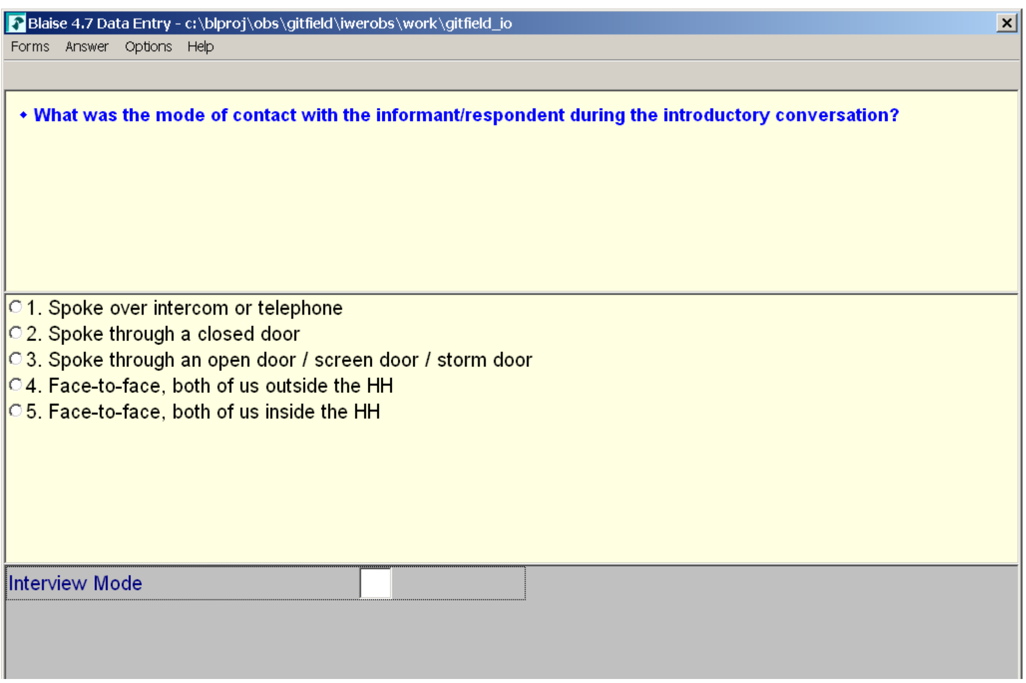


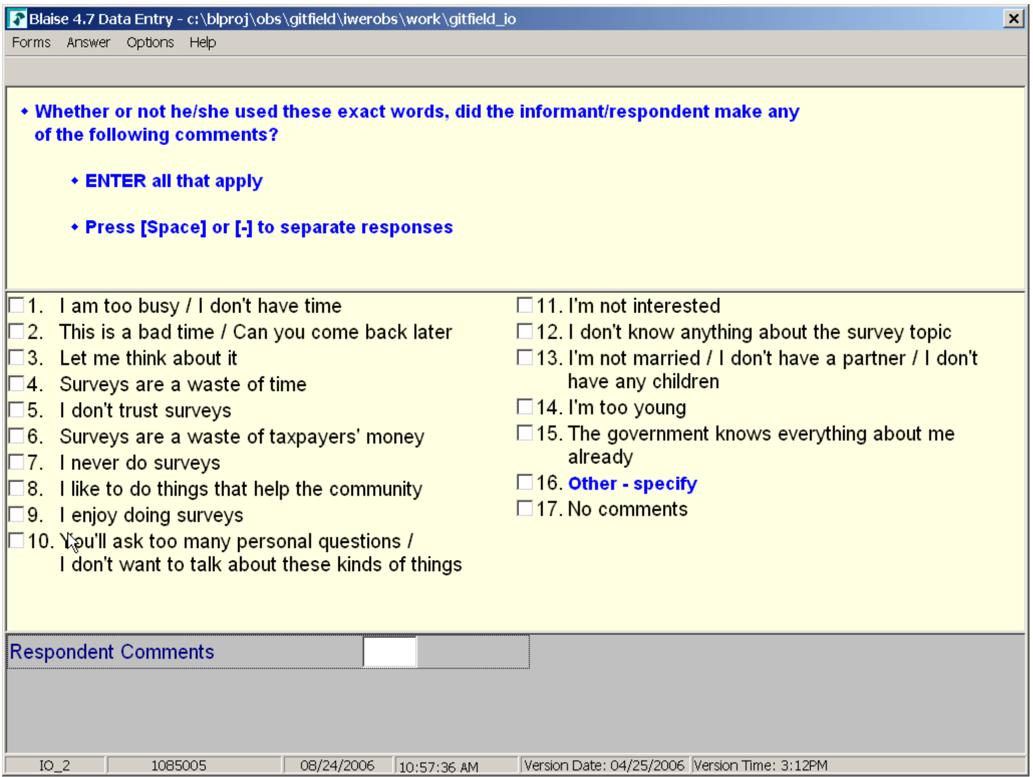
Contact Observations continued.



Interviewer Observations – Once an interview has been partially completed or completed, SurveyTrak will ask to launch the Interviewer Observations application. Click on the Interviewer Observations button to open the application and answer the subsequent questions.







Blaise 4.7 Data Entry - c:\blproj\obs\gitfield\iwerobs\work\gitfield_io

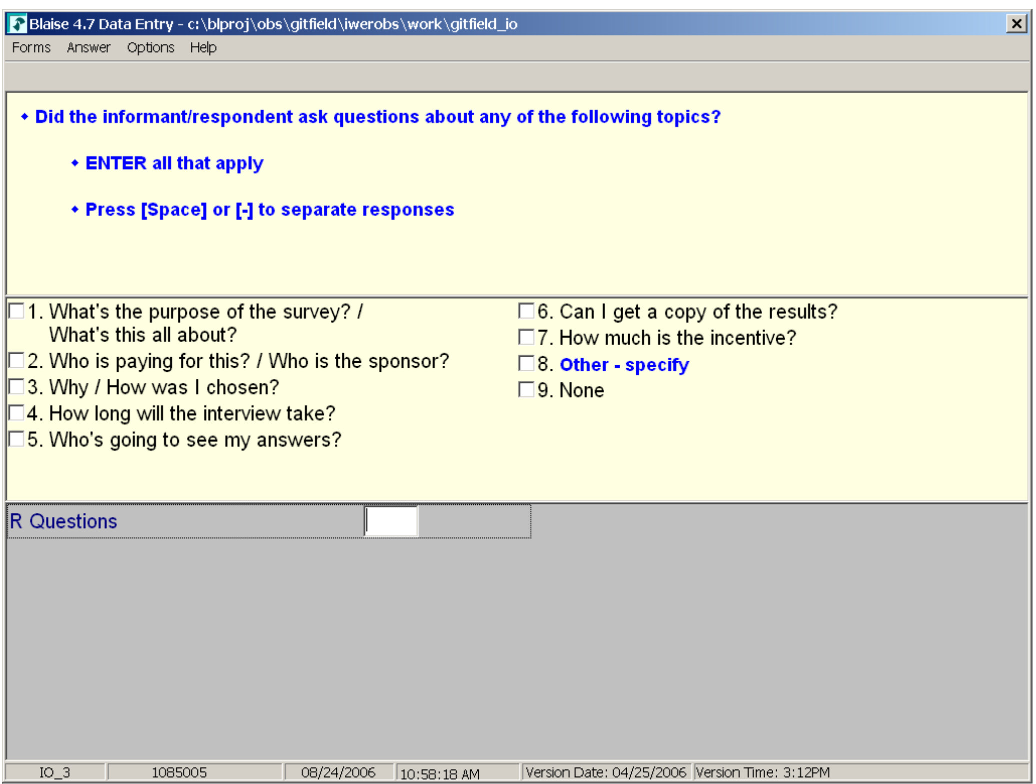
Forms Answer Options Help

- **Whether or not he/she used these exact words, did the informant/respondent make any of the following comments?**
  - **ENTER all that apply**
  - **Press [Space] or [-] to separate responses**

☐ 1. I am too busy / I don't have time
☐ 2. This is a bad time / Can you come back later
☐ 3. Let me think about it
☐ 4. Surveys are a waste of time
☐ 5. I don't trust surveys
☐ 6. Surveys are a waste of taxpayers' money
☐ 7. I never do surveys
☐ 8. I like to do things that help the community
☐ 9. I enjoy doing surveys
☐ 10. You'll ask too many personal questions / I don't want to talk about these kinds of things
☐ 11. I'm not interested
☐ 12. I don't know anything about the survey topic
☐ 13. I'm not married / I don't have a partner / I don't have any children
☐ 14. I'm too young
☐ 15. The government knows everything about me already
☐ 16. **Other - specify**
☐ 17. No comments

Respondent Comments

IO_2 | 1085005 | 08/24/2006 | 10:57:36 AM | Version Date: 04/25/2006 | Version Time: 3:12PM



Blaise 4.7 Data Entry - c:\blproj\obs\gitfield\iwerobs\work\gitfield_io

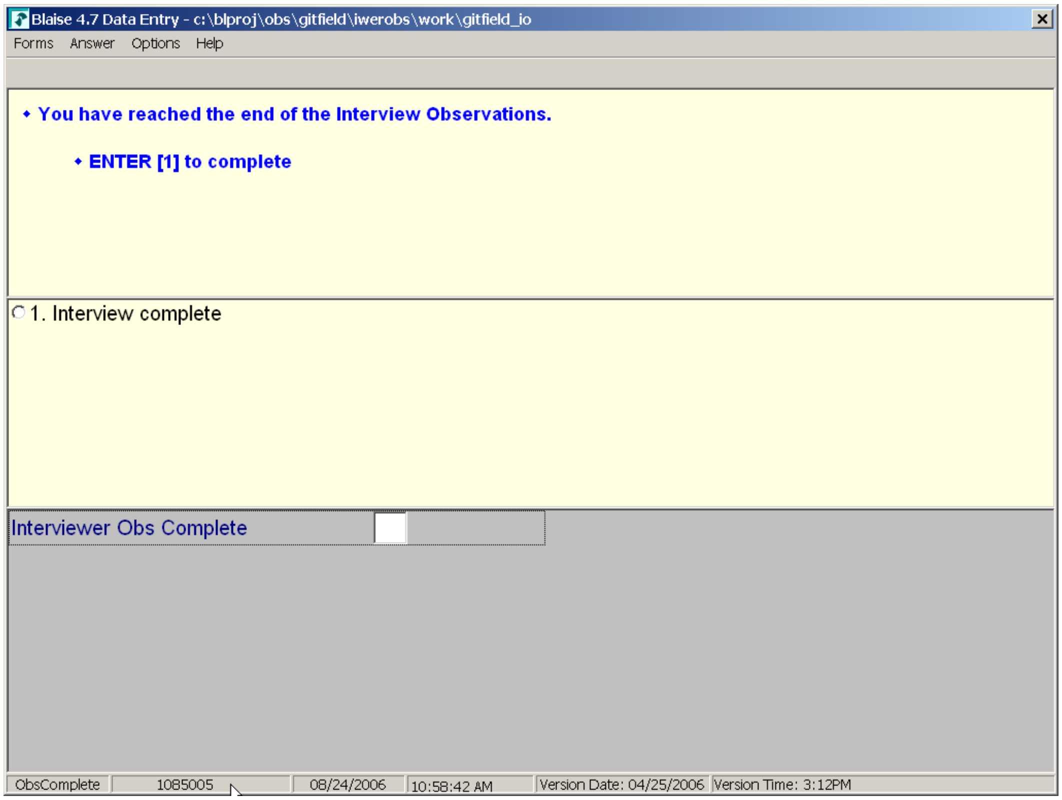
Forms Answer Options Help

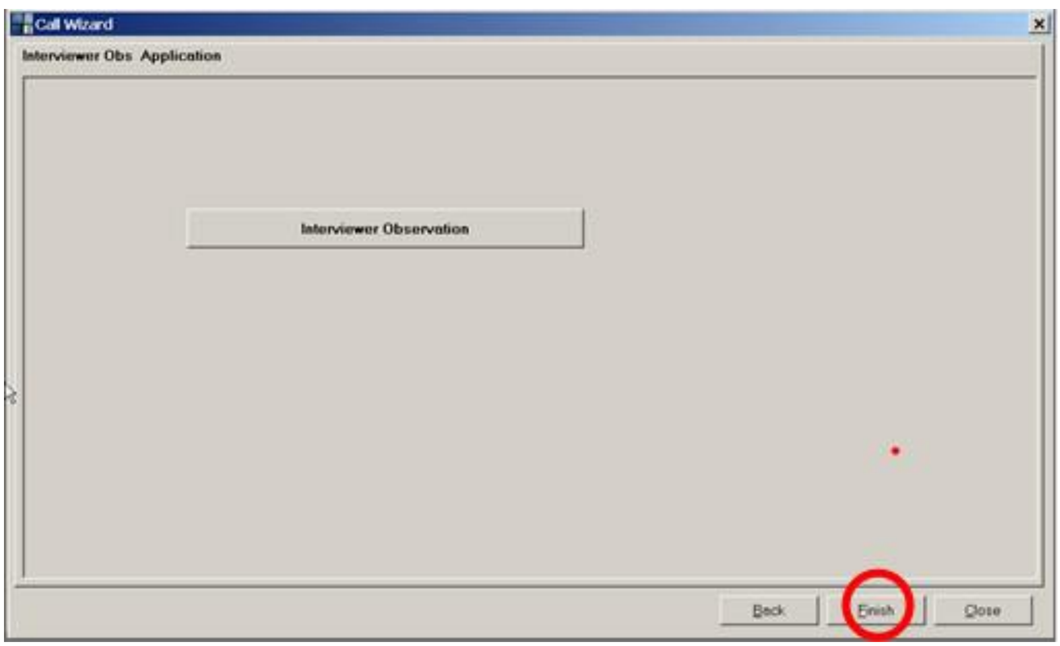
- **Did the informant/respondent ask questions about any of the following topics?**
  - **ENTER all that apply**
  - **Press [Space] or [-] to separate responses**

☐ 1. What's the purpose of the survey? / What's this all about?
☐ 2. Who is paying for this? / Who is the sponsor?
☐ 3. Why / How was I chosen?
☐ 4. How long will the interview take?
☐ 5. Who's going to see my answers?
☐ 6. Can I get a copy of the results?
☐ 7. How much is the incentive?
☐ 8. **Other - specify**
☐ 9. None

R Questions

IO_3 | 1085005 | 08/24/2006 | 10:58:18 AM | Version Date: 04/25/2006 | Version Time: 3:12PM





Once you have completed the Interviewer Observations, click **Finish** to return to the project window.

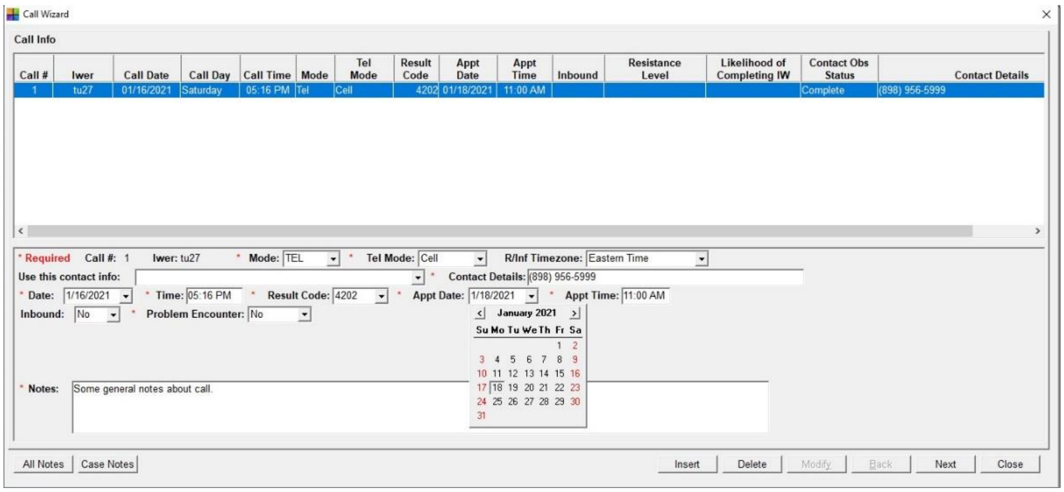
SurveyTrak

Entering Call Note with an Appointment

For calls you code as appointments or “best time to call,” an appointment time and date field will appear to the right of the mode and result code fields, as seen below:

***Note**: You must enter a four-digit year in the appointment window and the appointment time field must include AM or PM.*

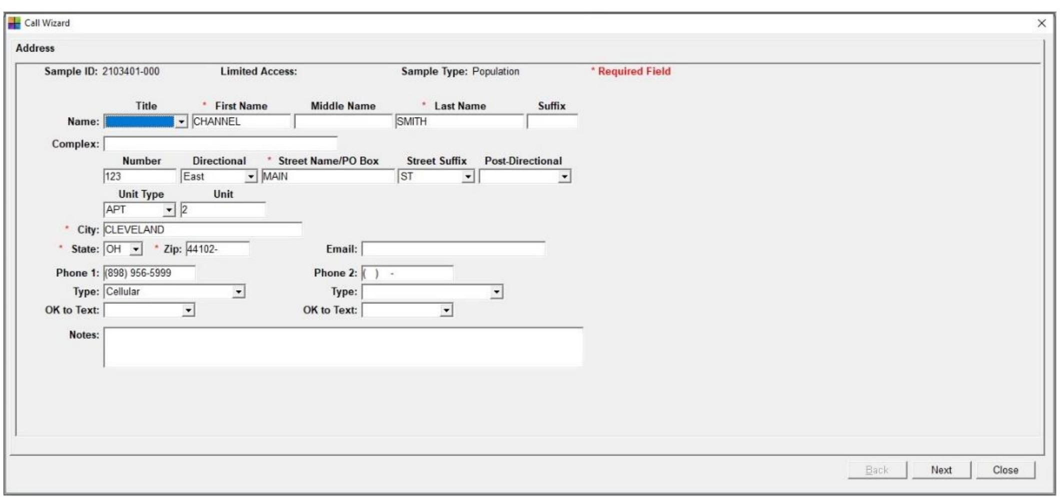
To set the date you may either type it in as MM/DD/YYYY or click on the drop down arrow and select it on the pop-up screen that appears.



Using Call Wizard after completed Interview – Once you have completed an interview, the Call Wizard will open and take you to the Respondent’s address information screen. If needed, click into the field you wish to update and click the **Next** at the bottom of the window when you have completed entering your information for that screen.

***Note**: A different series of screens may appear because they can vary from project to project.*

The Call Wizard eventually takes you to the address window for this Sample ID. Use the **Close** function to avoid entering the Interviewer Observations and return to the project window.

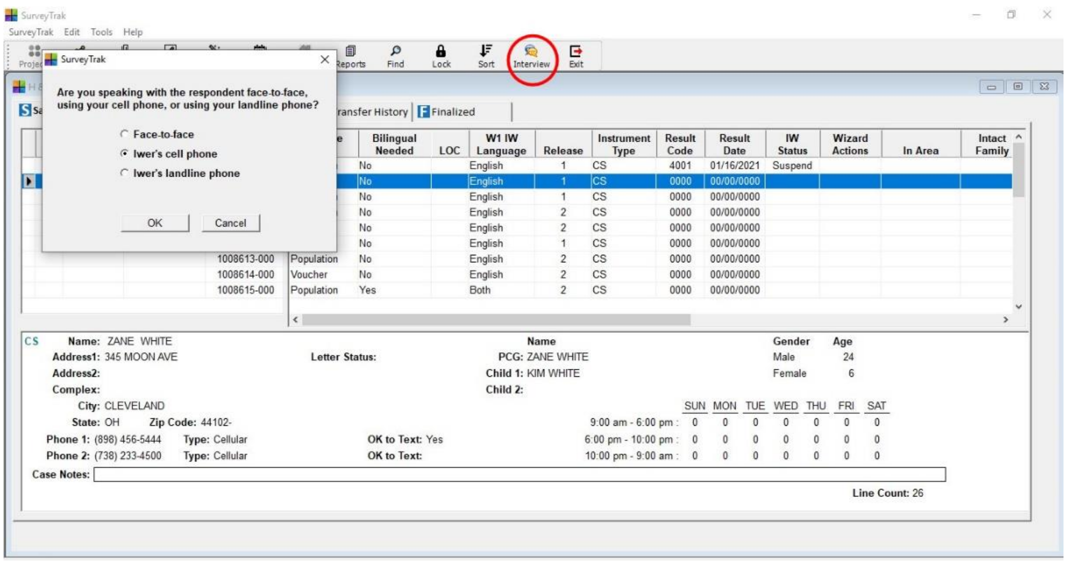


Interview

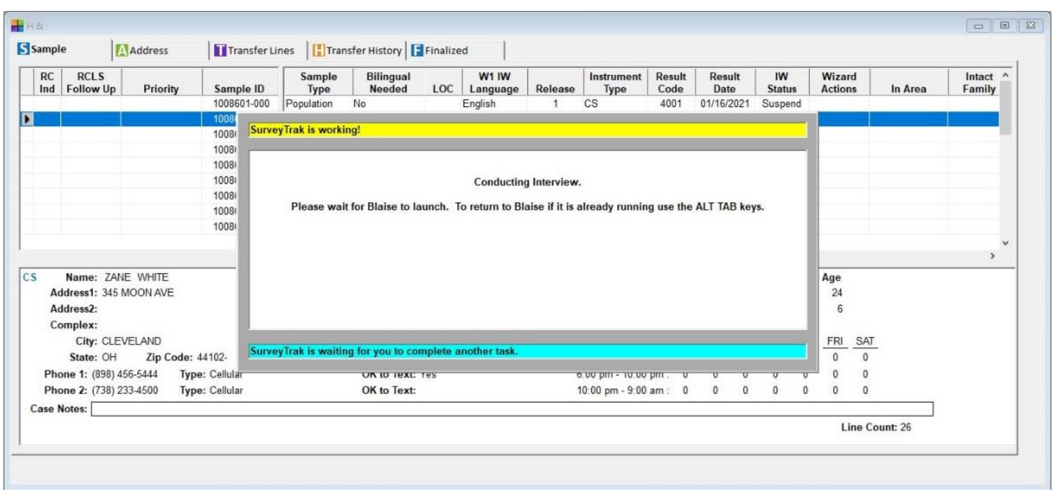
The interviews will be completed using Blaise which is a computer-assisted interview (CAI) system. This system guides you through the interview questions, displays helpful instructions, collects the recorded data, and alerts you when a response is incorrect or invalid. Blaise is an extremely powerful and user-friendly application that is easily learned. You launch Blaise to initiate the Interview process by highlighting the sample ID and doing one of the following:

- Click on the **Interview** icon on the menu.
- Press the **<F2>** key

SurveyTrak will initially open a window to select a mode (**Face-to-face, Iwer's cell phone** or **Iwer's landline phone**). Click on the appropriate mode to proceed.

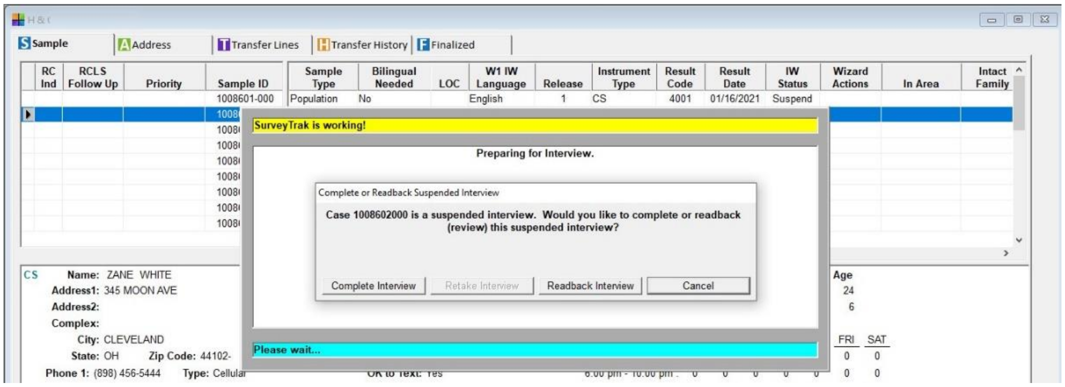


For projects using Blaise 4.8



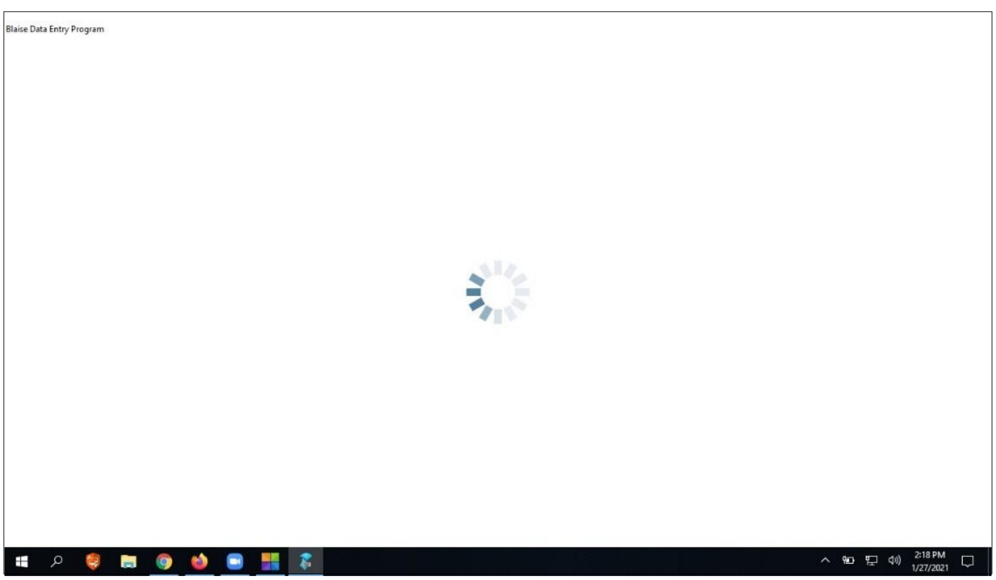
Once the mode is selected, the Blaise instrument displays that it is launching the interview.

If the sample line was previously suspended (incomplete interview), select whether you want to **Complete Interview** (resume) or **Readback Interview**. If this is a suspended interview, you also have the option to **Cancel** this process.

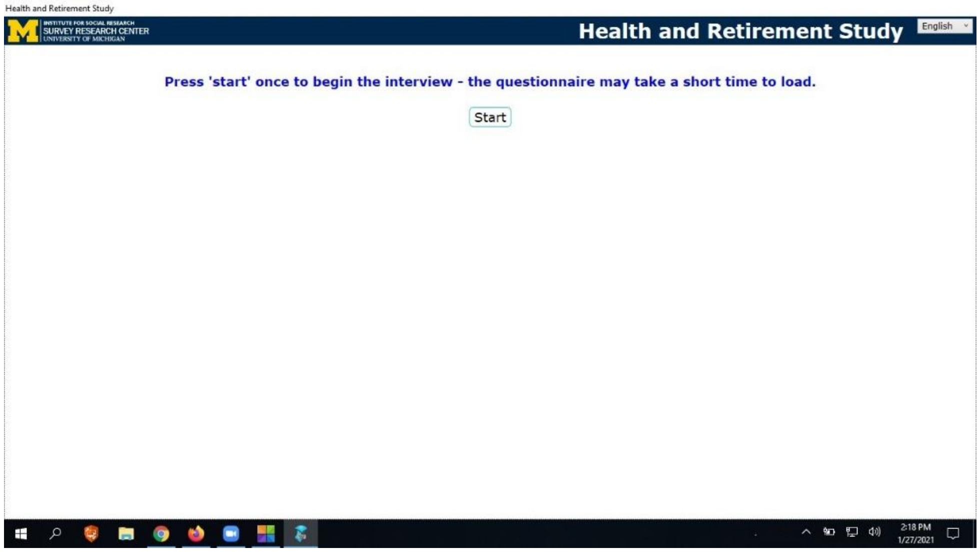


For projects using Blaise 5

Once the mode is selected, SurveyTrak displays “Preparing for interview”



Then you may see “Blaise Data Entry Program” window appear for a few brief moments (spinning wheel).



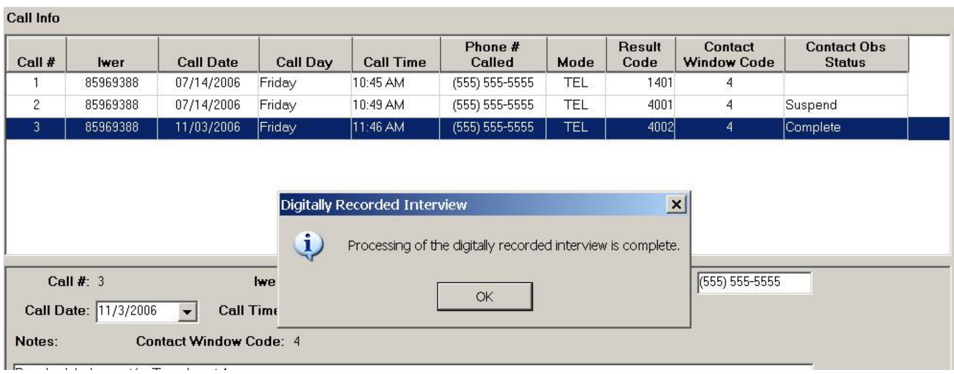
Once the Blaise 5 instrument has launched, it prompts to begin the interview. Click **Start**.

The interview opens to the first question and response field. Note that in Blaise 5 there is a top menu where the selections **Suspend**, **DK** (*don't know*), **RF** (*refused*) and when applicable, *language* (**English** is shown in above example).

Digitally Recorded Interviews (DRI)

Projects typically record selected interviews for quality control purposes. Upon launching an interview, one of the first questions you will encounter involves the respondent's consent for recording. When the question is displayed, the recording has begun in order to capture the respondent's response and if granted continues during the interview. If consent is denied, no further recording is made. (Generally, there is no indication that the interview is being recorded.)

After you have completed the interview, Camtasia will begin to process the recording you just made. Depending on the length of the interview, this could take a few minutes and you may see a screen indicating the progress. Upon completion of the processing, you will see the following message:



Note: You cannot close the call record or begin another interview until you get the "Processing of the digitally recorded interview is complete" message.

Pausing or Stopping the Recording

It is possible for the interviewer to pause the recording by pressing **Ctrl + Shift + 4**. Resume recording by pressing **Ctrl + Shift + 4** again. You can also select **Ctrl + Shift + Q** to end the recording process for the remainder of the interview. It should be extremely rare to employ these controls as other options may exist in a given interview situation (*see below*).

> ***Best Practices***
> You may encounter a respondent who decides that they do not want to have their responses to specific questions recorded – certain information requested during the interview may be very personal or private. **Best practices** suggests **suspending** (*Alt + X*) the interview at that point to end recording and adding a call note. Then resume the interview beginning with the consent question so that they may decline recording before moving on to the sensitive question(s) portion previously suspended so no further recording will occur during the remainder of the interview.

Send/Receive

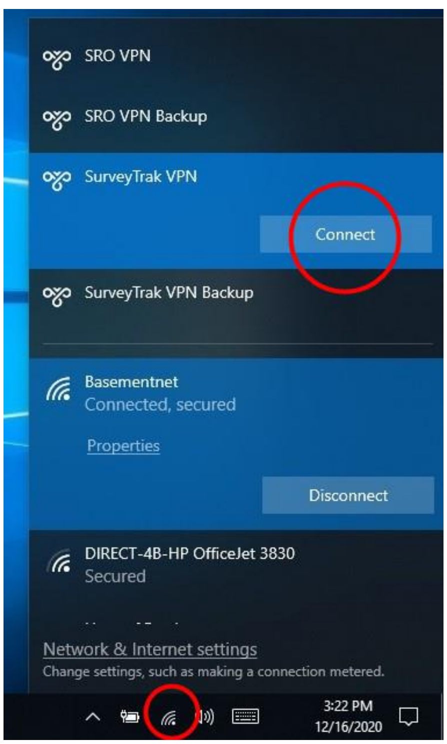
The Send/Receive function is used to communicate with the ISR servers in Ann Arbor, Michigan. Utilizing an Internet connection, it enables transmission of data collected in the field as well as permits updating the system files used by SurveyTrak for your project. Sending and receiving is a critical part of your daily routine. Before you begin the communication, be sure to confirm and update your records so that the data you transmit are as accurate as possible.

***Note**: You should be sending data back to ISR at least once a day.*

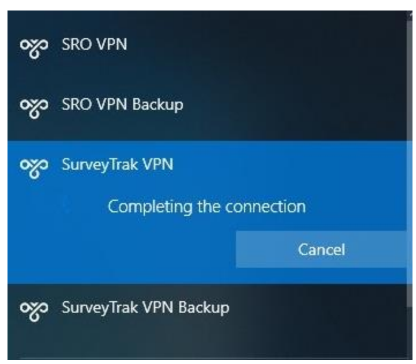
Internet connectivity is required to perform the Send/Receive and can be accomplished using a wireless network or wired Ethernet connection. Your laptop is also configured with a VPN connection to encrypt the data communication so that you may use any home or public network. To communicate in SurveyTrak (Send/Receive) you must first close or exit your Project screen.

- Connect the laptop to the wireless (or wired) network with Internet access.
- Connect the SurveyTrak VPN
- Click **Send/Rec** on the SurveyTrak toolbar.

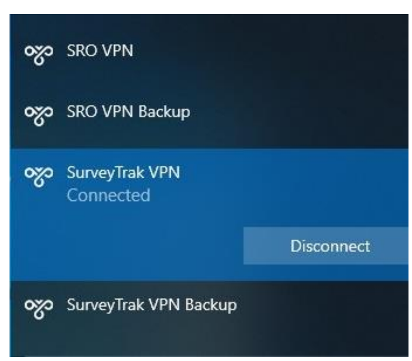
VPN Connection Sequence



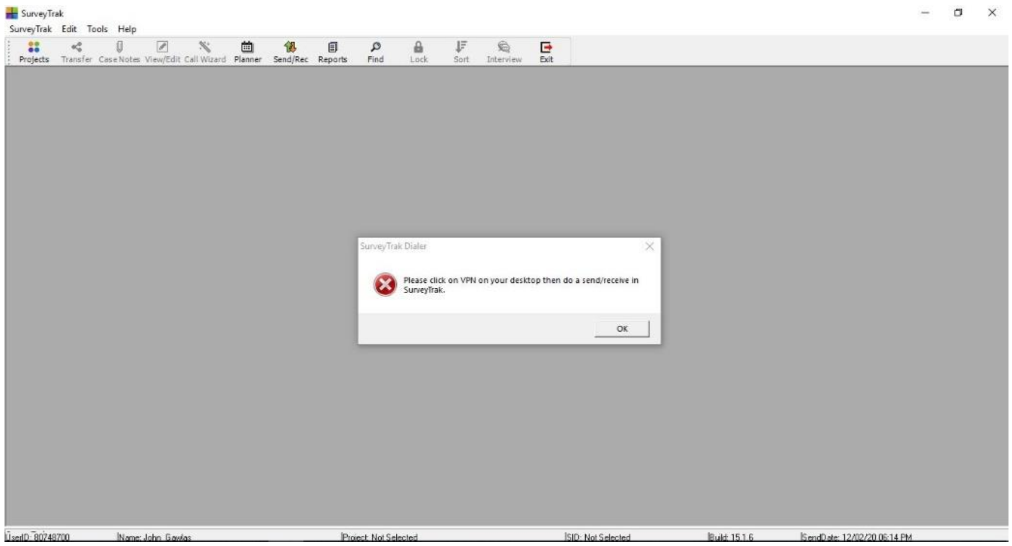
After clicking on Connect, you should see the status “Completing the connection”



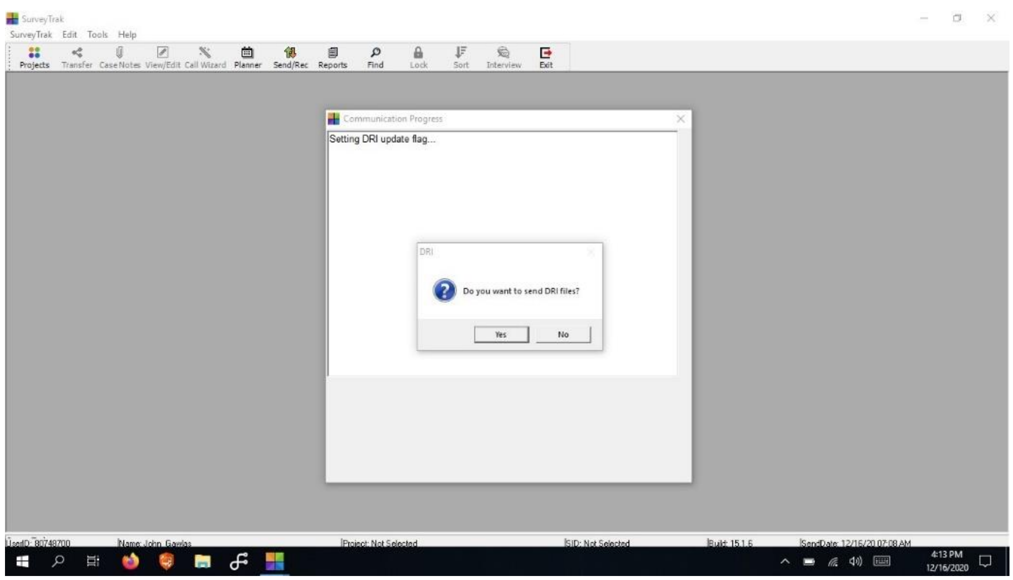
If successful, the status will indicate “Connected”.



Initiate Send/Receive 

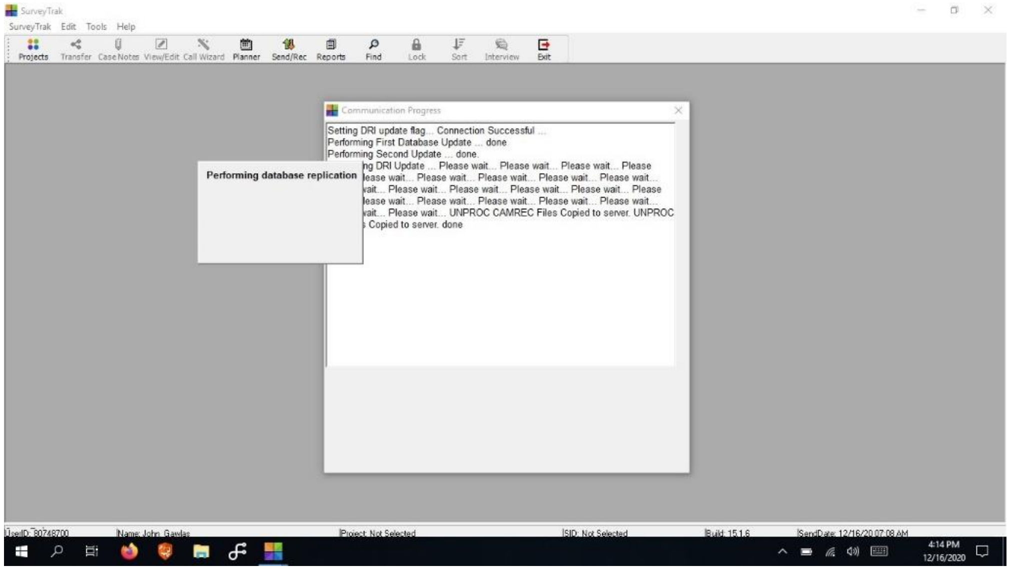


If you forget to establish the VPN connection before clicking on Send/Rec, you will see this error message displayed on the SurveyTrak screen.

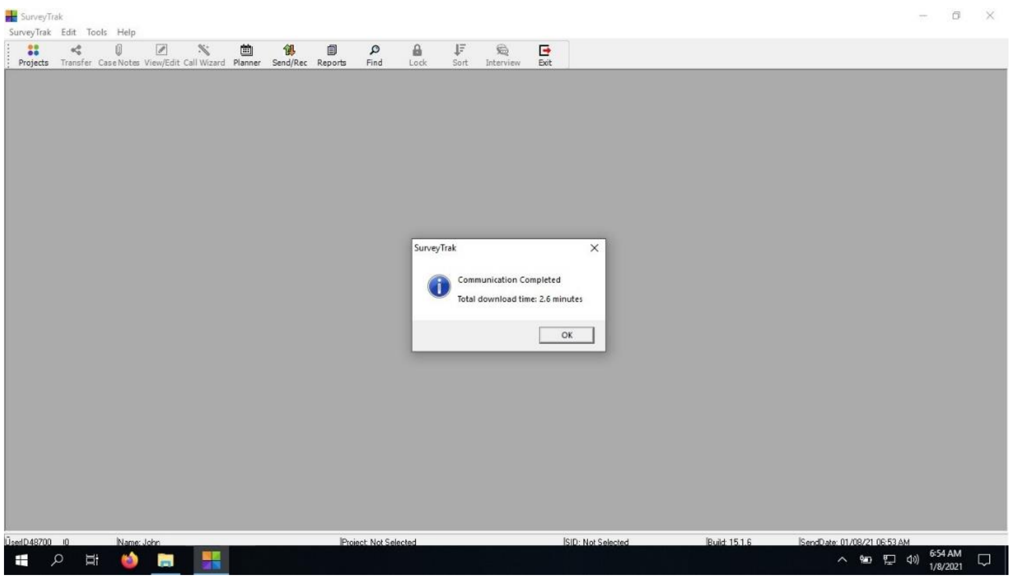


With VPN connected, clicking **Send/Rec** will prompt to ask, "*Do you want to send DRI files?*"

It is generally recommended to always click **Yes** to ensure that any DRI files stored on the laptop are uploaded during the data transmission.



Communication Progress window is visible during the send/receive process

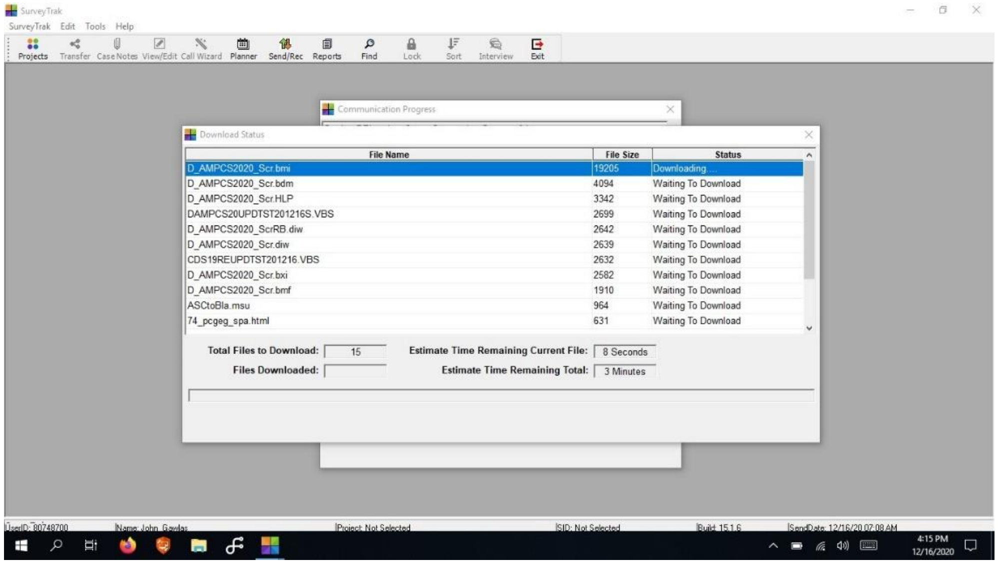


Upon successful completion of the transmission, you will get the "*Communication Completed*" message. If you get an error or a message that the server was busy ("*try again in 15 minutes*"), you will have to initiate another send/receive.

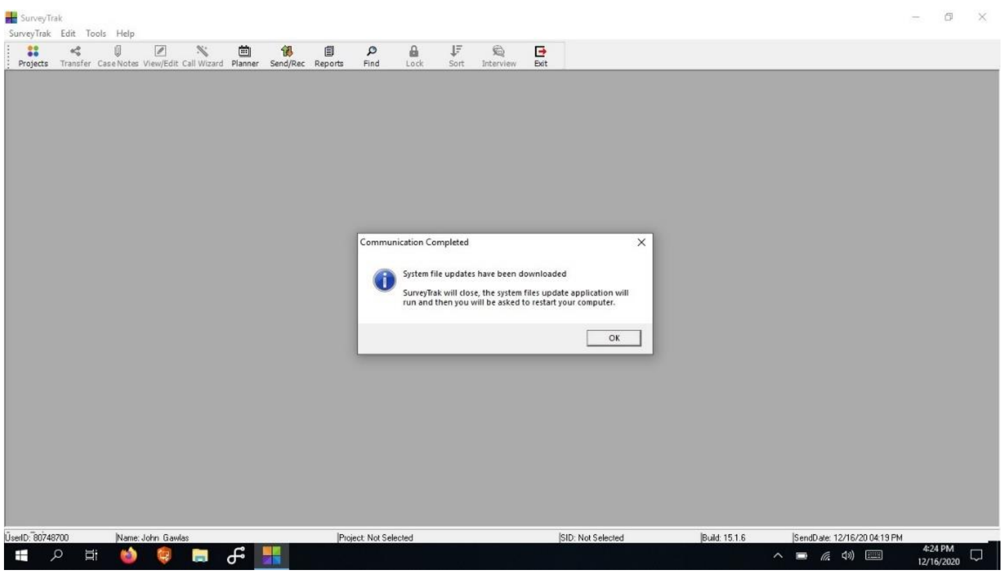
SurveyTrak Updates

Occasionally your project will require SurveyTrak file updates and you will be notified to complete two (2) send/receives to pick up files. During the process, the Download Status window should display.

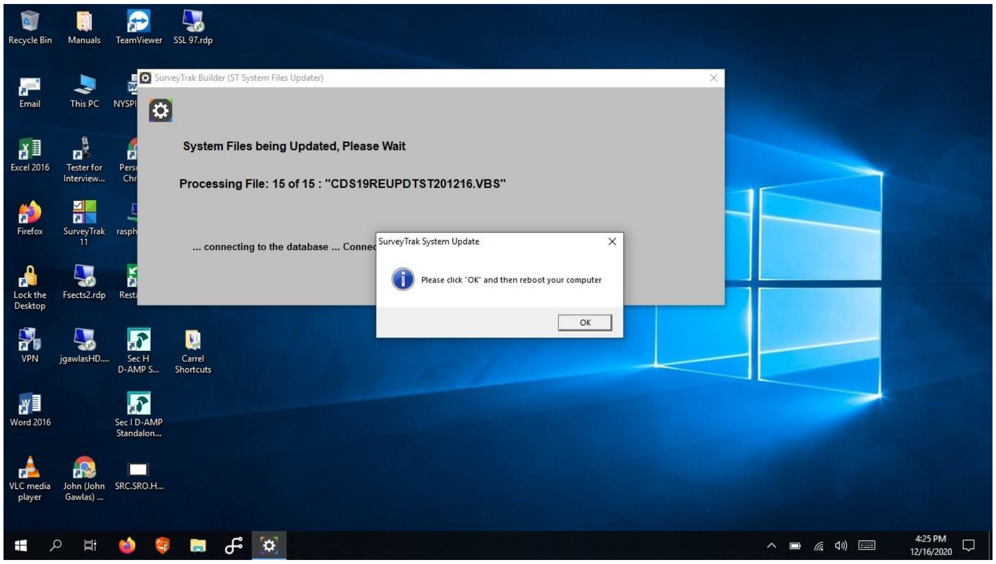
SurveyTrak download in progress



Download Status window lists the files to be downloaded and estimated time remaining to completion.



When the download is finished, you will see the "*System file updates have been downloaded*" message window. Once you click **OK,** SurveyTrak closes and the file update application will automatically run.



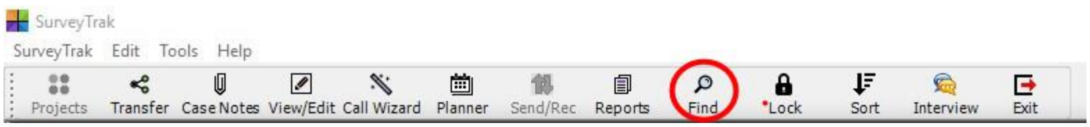
The file update application window will be displayed and when it is finished processing, you are prompted to click **OK** and reboot (restart) your computer. Once the laptop restarts and you login to Windows, you can launch SurveyTrak again to perform a second send/receive.

Using Find & Sort

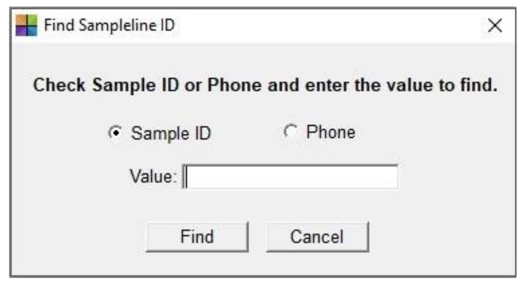
Find

You can quickly location particular Sample IDs using the Find function on the **Sample**, **Address**, or **Finalized** tabs. (If you do not have a project open, Find will also search across all projects currently loaded in SurveyTrak.)

1. Launch the **Find** function by selecting it on the toolbar (or clicking on upper menu **Tools**).



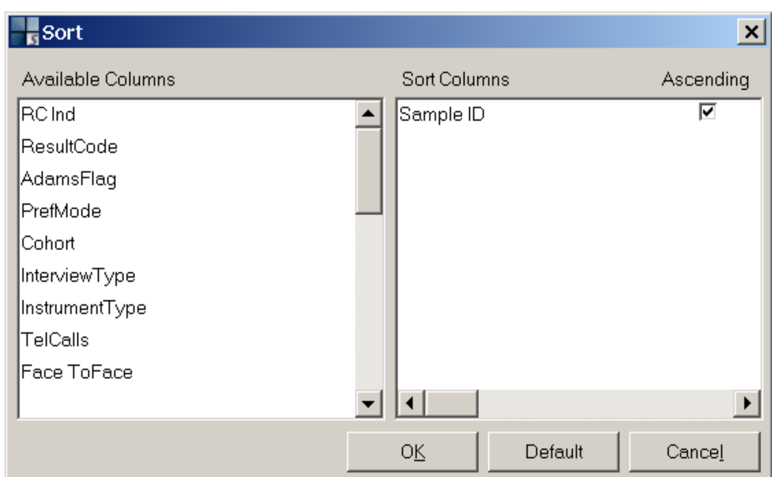
2. The **Find Sampleline ID** screen will display.
3. Enter the Sample Id or Phone number.
4. Once you have finished entering the value, click the **Find** button and SurveyTrak will return to the Project window and the Sample ID will be highlighted.
5. Find will display a message if no matching Sample ID is found.



Sort

SurveyTrak allows you to sort your sample lines in the Sample, Address or Finalized tabs in various ways.

1. To change the order in which your Sample is sorted, select the **Sort** button on the toolbar (or click on upper menu **Tools**).
2. A window will open that lists all of the column headings found in the Sample Lines tab.



3. To select a column heading that you would like sorted, drag that column heading from the **Available Columns** (left) to the **Sort Columns** (right) of the window. Ascending order is selected by default.

4. To sort descending, uncheck the ascending box. SurveyTrak begins its sort based on the listed order of Sort Columns shown on the right.
5. When you have defined the desired sorting order, click on OK to return to the Sample tab to view the resulting sort order.

OK	Executes the search.
Default	Returns the project to the original sort.
Cancel	Does not save any changes and returns to the previous screen.

Lock Columns

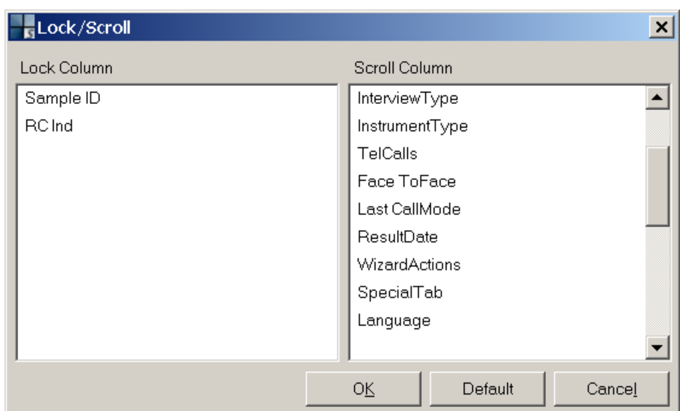
You can use the Lock function to keep selected columns in the view on the **Sample**, **Address**, and **Finalized** tabs.

- A *locked* column always remains in view.
- A column is *unlocked* when it scrolls with the horizontal scroll bar found below that list listed Sample ID.

SurveyTrak allows you to select which columns you wanted locked, and which columns you want to scroll. To access the Lock Columns function, follow the steps below.

1. On the **Sample** tab, click on the **Lock Columns** button on the toolbar. The following Lock/Scroll screen will display.

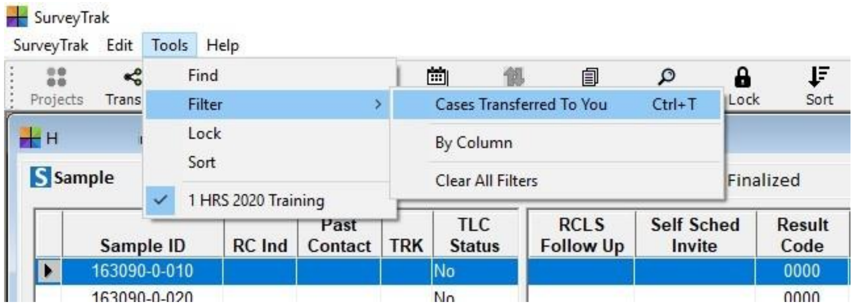
2. The left half of the window lists currently locked columns. The right half of the window lists the remaining columns that scroll. In order select a column to lock, simply drag that column heading from the scroll (right) half of the window to the locked (left) half of the window.



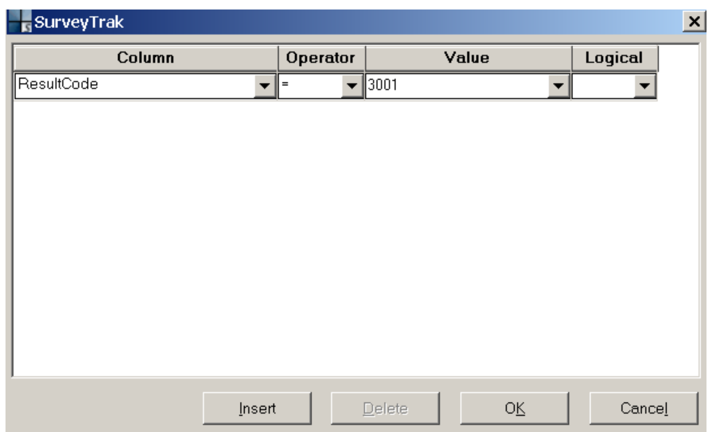
3. To unlock a column, simply drag the column heading from the locked half of the window to the scroll half of the window.
4. When you have selected all of the columns that you want locked, click **OK**.

Filter

Use the **Filter** function on the tools submenu to enable filtering out of Sample IDs from the **Sample**, **Address** or **Finalized** tabs.



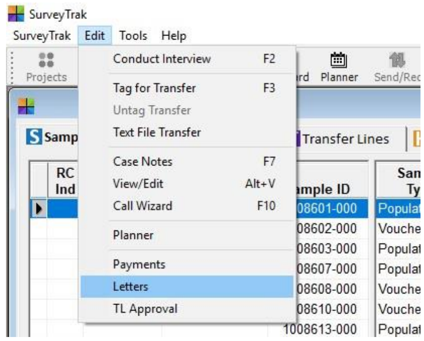
- **Cases Transferred To You** - This function hides any sample IDs that were transferred to you by another interviewer.
- **By Column** - This function filters out sample IDs based on specific values in the specified columns. When filtering by columns, clicking in the blank field will open up a drop down list, which includes all possible values that can be entered in that field. A left click selects and places the selected value in the field. For example, selecting ResultCode (column) and then 3001 (value) will display the following:



- **Clear All Filters** - Removes any existing filters (show all of your sample lines.)

Edit Menu

Based on the requirements of your project, the top **Edit** menu could have two options that are not on the toolbar. The two options are for **Letters** and **Payments**.



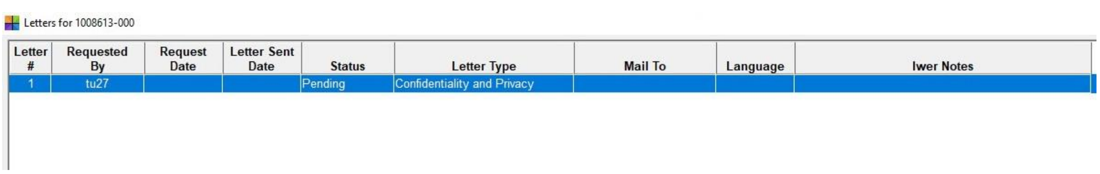
Letter Request Form

You can use the **Letters** option to request a letter to a respondent or another individual. You should consult your Team Leader before requesting a letter as the request is sent to the Ann Arbor office during the next SurveyTrak send/receive. This routes the request to WebTrak (web based software for Team Leaders) where someone on the project staff will be able to see the request, comment on it, create a letter from the information or deny the request.

Following action by staff, SurveyTrak updates after any subsequent send/receive so that the interviewer can view the results of the request on their laptop. Therefore, if a letter was sent, the interviewer can plan the next follow-up contact.

Letters request option includes the following features:

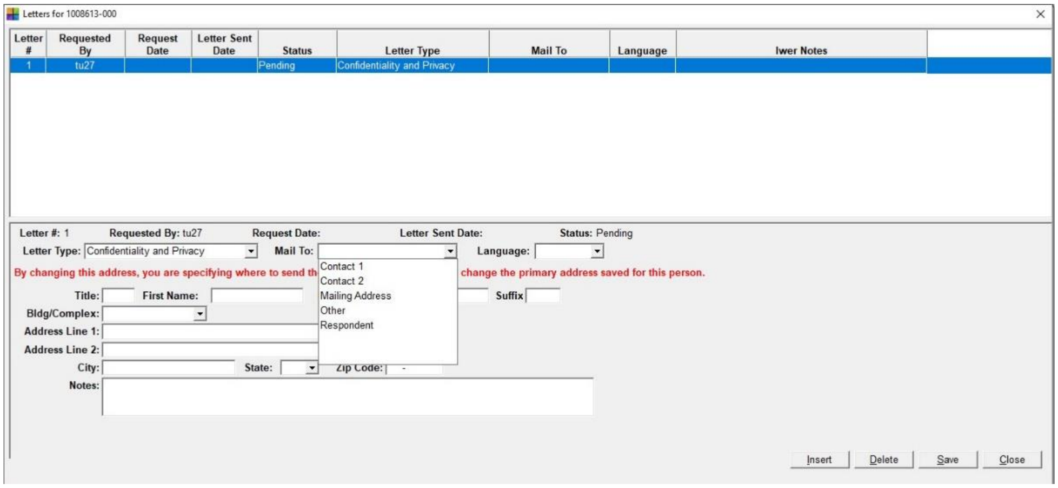
- Interviewer can make unlimited number of requests
- Requests can be in a variety of languages
- Requests can be sent to a variety of available addresses
- A complete "letter-request" history will be recorded and available for interviewers and approvers to review as well



Letters for 1008613-000

Letter #	Requested By	Request Date	Letter Sent Date	Status	Letter Type	Mail To	Language	Iwer Notes
1	tu27			Pending	Confidentiality and Privacy			

Highlight the sample ID on the Sample tab and then select the **Letters** option on the **Edit** menu to launch the letter request form. The following screen will display:



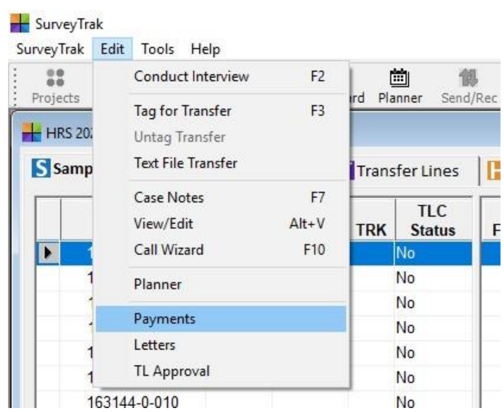
The four action buttons available on the bottom of the window:

Insert	Used to add a new Letter request record.
Delete	Used to remove the Letter request. This option is only active before completing a SurveyTrak send/receive after the request form has been saved.
Save	Used to save the information that you have entered.
Close	Closes the screen and returns you to the **Sample** tab.

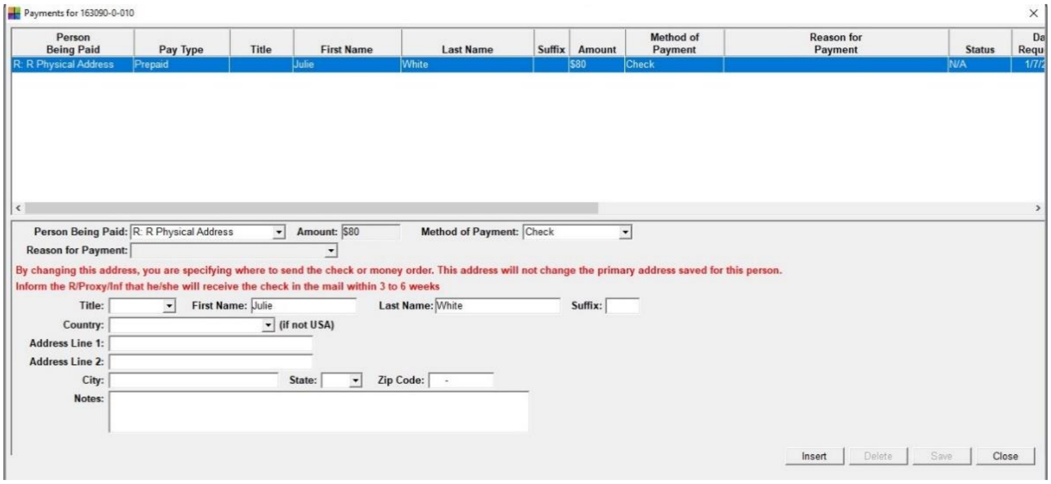
Payments

The Payments option is used to request a payment to a respondent, proxy or informant. The payment request is sent to the Ann Arbor office during the next SurveyTrak send/receive. Once the Ann Arbor office issues the check or money order, this screen updates following a send/receive so the interviewer knows when the payment was sent.

Enter a payment request by highlighting the Sample ID on the **Sample** tab and then selecting the "Payments" option on the Edit menu.



The following screen should display:



The four action button at bottom of the window are:

Insert	Used to add a new Payment request record.
Delete	Removes the request but only active if you have not yet completed a SurveyTrak send/receive after initially saving a request form.
Save	Saves the information that you have entered.
Close	Closes the screen and returns you to the **Sample** tab.

The field values are:

Person Being Paid	Drop down box. Choose Respondent or Proxy.
Amount	Enter the amount to be paid.
Method of Payment	Drop down box. Options vary based on project specification. For example, Check or Money Order.
Name and Address	Information defaults in from the **Address** tab. This information may be changed if needed.
Reason for Payment	Drop down box. Options vary by project.
Notes	Note/Memo field to record brief comments about the request.

The top half of the window displays payment records and includes these fields:

Date Requested	The date request was sent.
Status	The status of the payment.
Date Approved	The date the Ann Arbor office approved the payment.
Date Check Issued	The date the check was issued from the Ann Arbor office.

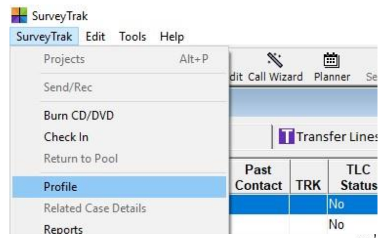
These record fields will update following the SurveyTrak send/receive.

Profile

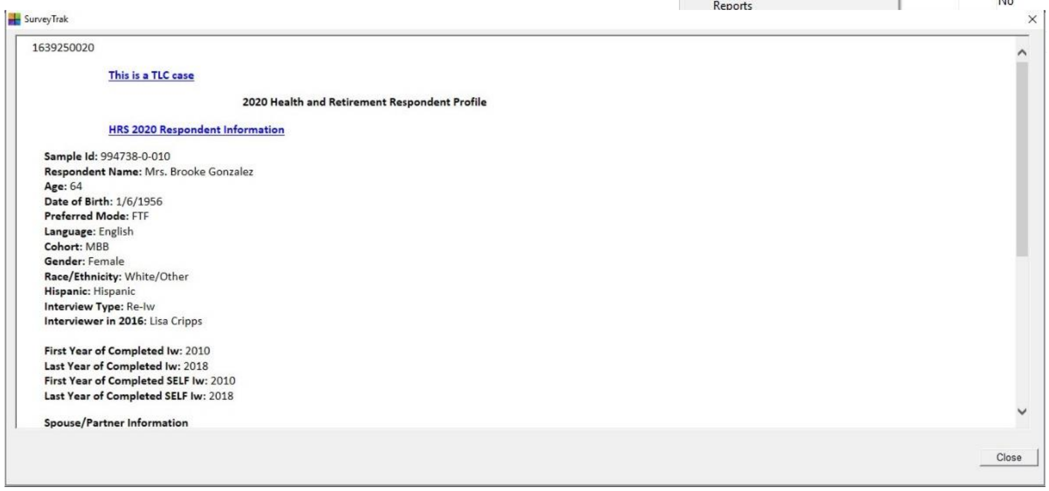
Profile (or *respondent profile*) is an option that stores and displays historical information about respondents gathered from previous waves. Information contained in the Respondent Profile is strictly confidential and should only be viewed by the interviewer.

Note: *The Profile option cannot be open in SurveyTrak at the same time as the interview (Blaise.)*

To view a Respondent Profile for a particular Sample ID:

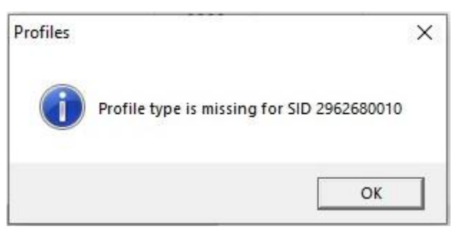


1. Select the Sample ID on the **Sample** or **Address** tab.
2. Select Profile on the SurveyTrak menu.
3. A window similar to below will display.



To view all the information, use the scroll bar on the right. To exit the profile, select the **Close** button

When profile information is not available for a Sample ID, the following message window appears.

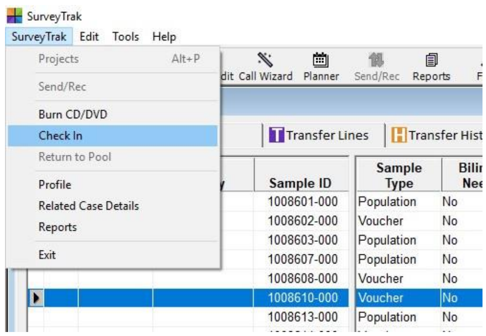


Check In (Sample Line)

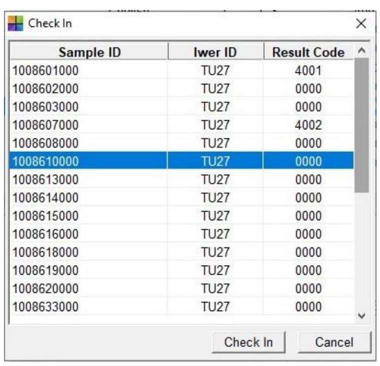
The Check In feature allows interviewers to release control of the sample line(s) that are assigned so they return to the Ann Arbor Central Office. Often this is done to permit resetting of the line or for corrections to be made by Data Operations. It has the effect of removing the line from the interviewer's laptop.

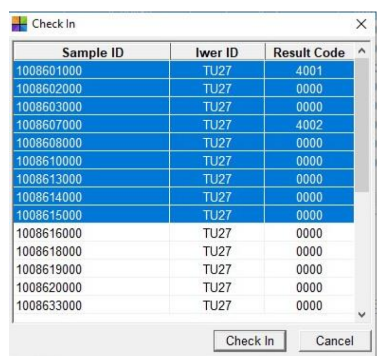
TIP: Generally, the **Check In** function needs authorization by your TL, Project Manager or Help Desk to resolve an issue with a sample line. Use the **Transfer** option when you need to re-assign the sample line(s) to another interviewer.

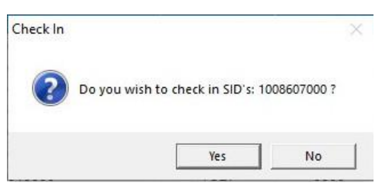
1. Select the sample line to check in by highlighting the line on the **Sample** tab.
2. Select the **SurveyTrak** menu and then select **Check In** option.



3. The Check In screen will have the SID highlighted from the **Sample** tab. You may select another SID or multiple SID's on this screen. To select nonadjacent SIDs on the lists, click the SID. Hold down **<Ctrl>** and click on each additional SID. To select adjacent SIDs on the list, click the first SID in the sequence. Hold down **<Shift>** and click on the last SID.

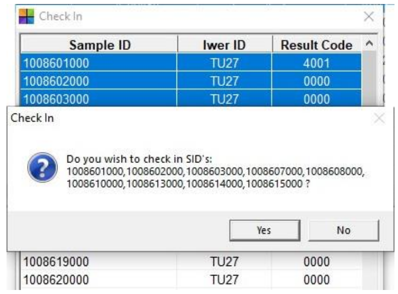






4. Click the **Check In** button and you will be prompted with a message window (to confirm).
5. Click Yes to confirm the SID (sample ID) to check in.

6. If you are checking in multiple sample lines (such as main line together with screener line or partner line), the message will list all the SIDs to confirm – then click **Yes**.



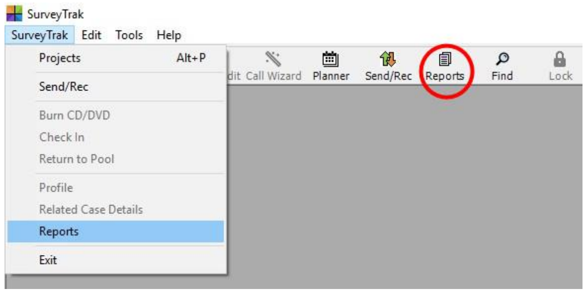
7. Once you confirm the check in of sample line(s), they will no longer display in the Sample tab. (Be aware that you cannot undo check in once you click Yes.)
8. You will need to initiate a SurveyTrak **send/receive** to complete the check in process so that the sample line(s) are sent back to the Ann Arbor Central Office.

TIP: Once review and/or corrective action by Data Ops, sample line(s) typically are checked back to the interviewer who receives them in the course of a send/receive.

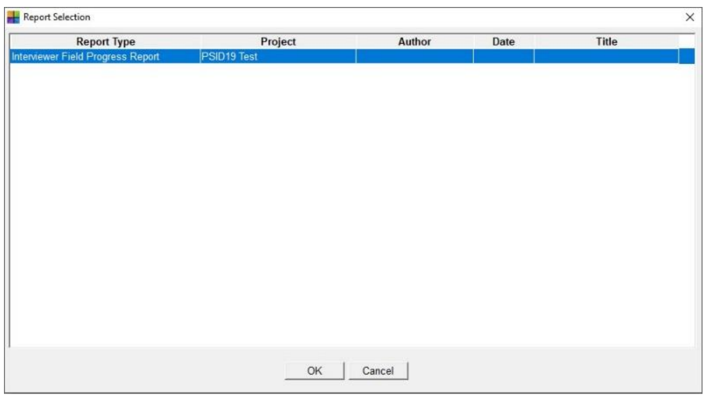
***Note**: Check In is not the same as Transfer, therefore the **Transfer** tab or the **Transfer History** tab will not display the lines that have been "checked in."*

Reports

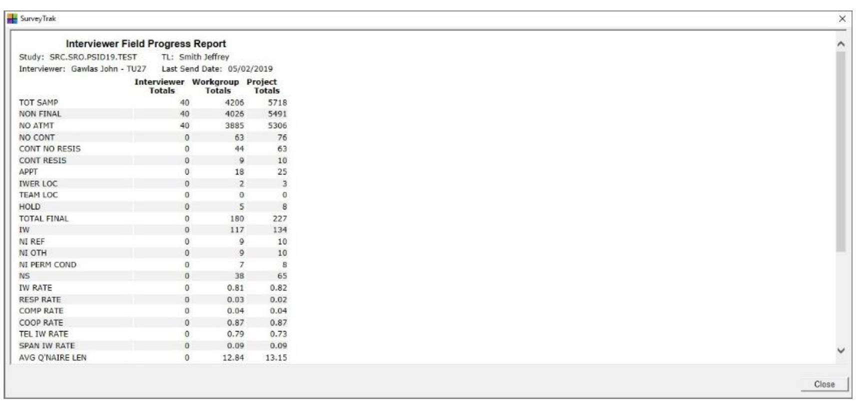
Depending on the needs and requirements of each project, different reporting options within SurveyTrak may be available. You may access these by selecting **Reports** on the **SurveyTrak** upper menu. or by clicking the **Reports** icon on the toolbar



After selecting the Reports option, a screen similar to the one below will display the reports currently available.



To run a report, highlight the report name and click **OK**.


SurveyTrak

Interviewer Field Progress Report

Study: SRC.SRO.PSID19.TEST TL: Smith Jeffrey
Interviewer: Gawlas John - TU27 Last Send Date: 05/02/2019

	Interviewer Totals	Workgroup Totals	Project Totals
TOT SAMP	40	4206	5718
NON FINAL	40	4026	5491
NO ATMT	40	3885	5306
NO CONT	0	63	76
CONT NO RESIS	0	44	63
CONT RESIS	0	9	10
APPT	0	18	25
IWER LOC	0	2	3
TEAM LOC	0	0	0
HOLD	0	5	8
TOTAL FINAL	0	180	227
IW	0	117	134
NI REF	0	9	10
NI OTH	0	9	10
NI PERM COND	0	7	8
NS	0	38	65
IW RATE	0	0.81	0.82
RESP RATE	0	0.03	0.02
COMP RATE	0	0.04	0.04
COOP RATE	0	0.87	0.87
TEL IW RATE	0	0.79	0.73
SPAN IW RATE	0	0.09	0.09
AVG Q'NAIRE LEN	0	12.84	13.15

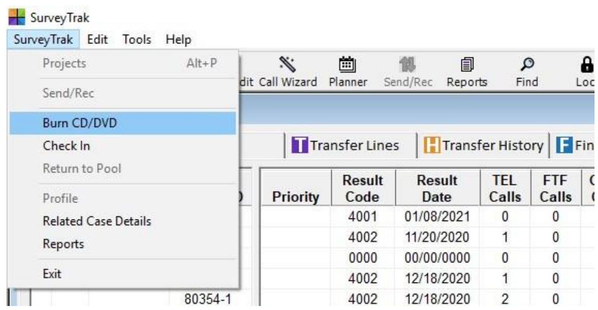
Close

SurveyTrak will open the report (example shown here). When finished viewing the report, click **Close** to return to the previous screen.

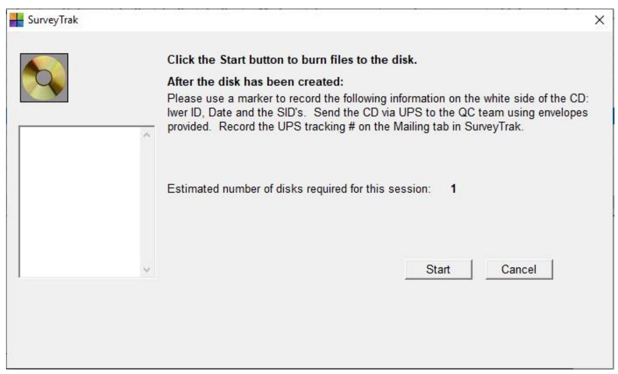
SurveyTrak

Burn CD/DVD

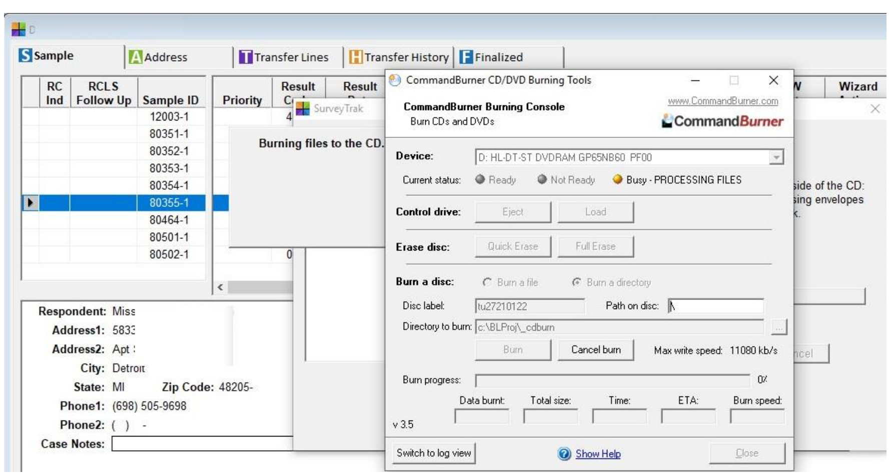
Recordings from your interviews are saved on the laptop in a secure, encrypted file. Generally, these recorded IWs (also referred to as "DRI" files) are transmitted back to the Ann Arbor Central Office during your SurveyTrak send/receive communications. However, there may be circumstances necessitating you to copy or "burn" the files to a DVD and send them to Ann Arbor – an external DVD drive may be provided to you for this purpose. When applicable, the project will provide DVDs and mailing instructions.



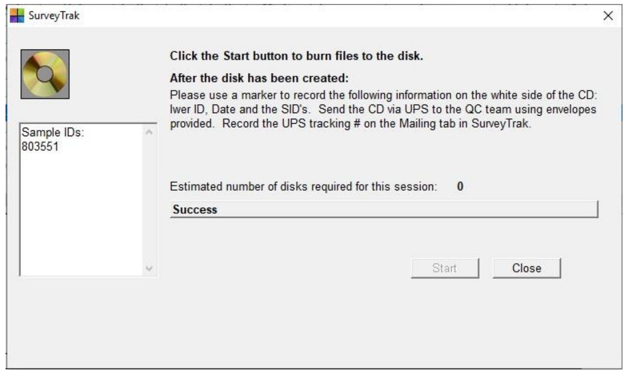
To begin the burning process, click on **Burn CD/DVD** from the upper SurveyTrak menu. This will launch the following window:



This window will specify the number of DVDs required for the session. Insert the DVD into the drive and click the **Start** button.



Next, the **Burning files** message appears followed by the CommandBurner status window.



Once you see the SurveyTrak window display **Success** (shown under the "*Estimated number of disks required for this session*"), you can remove the DVD and label it with your **interviewer ID**, **Date** and **SIDs**.

Upon receipt of the DVD in Ann Arbor, once project staff confirm and log the contents, these DRI recording are erased from your laptop during your next send/receive.