

## WinCati / Logging In

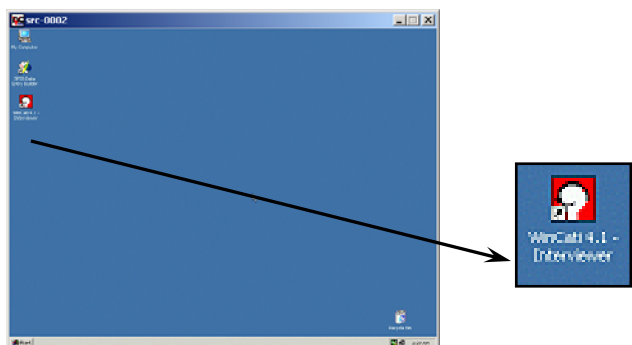
1. Turn on computer and monitor.
2. Press Ctrl-Alt-Del when prompted.



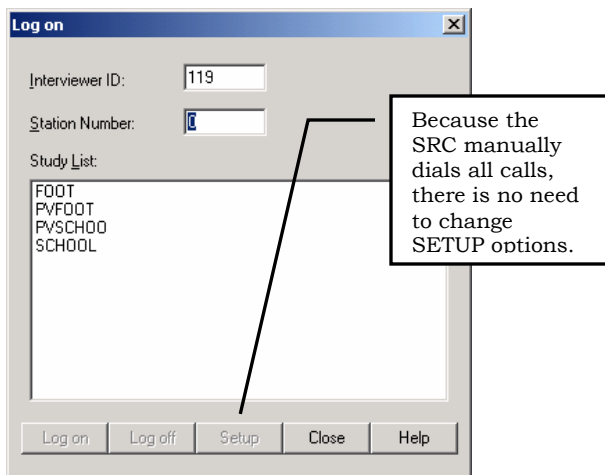
3. Log in to network. Username: Wincati Password: \_\_\_\_\_



4. Start interviewing application by double clicking WinCati desktop icon.



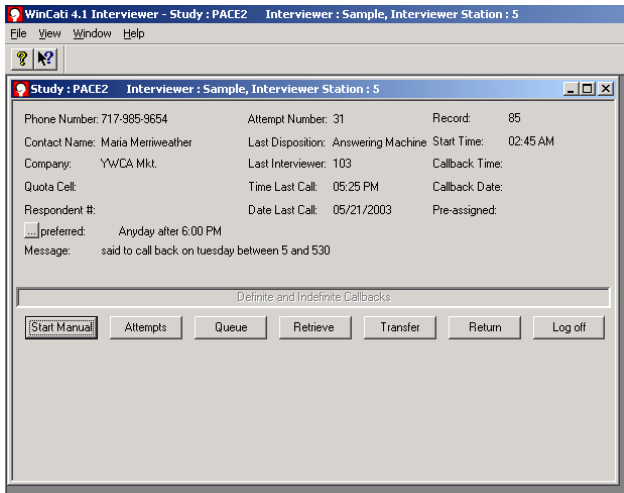
5. Enter Interviewer ID and station number.



6. Choose from available studies by highlighting the study and clicking "Log on".

## WinCati / Interviewer Options

This section details the options available before each interview actually starts. The screen below is typical of one that will be displayed each time you logon to a study. A call record has already been selected by the Sample Manager, a module of WinCati that uses many factors to determine the next best call for each interviewer to make.



**Start Manual** – Begin the interview

**Attempts** – View all previous call attempts

**Queue** – View sample waiting to be dialed

**Retrieve** – Retrieve call record from sample database

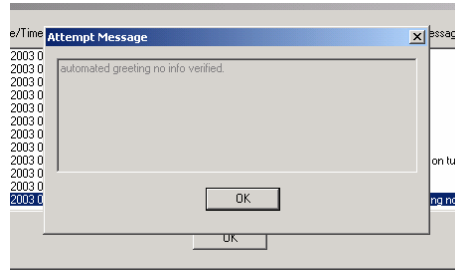
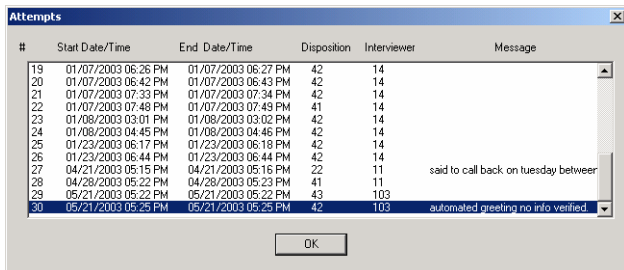
**Transfer** – Transfer call record to another interviewer

**Return** – Return a call record to the sample as unattempted

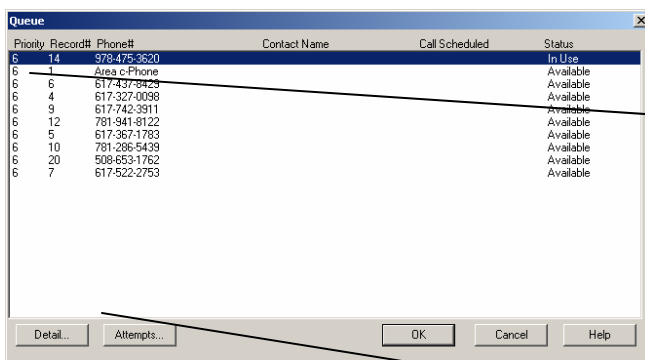
**Logoff** – Logoff or select another study

➤ **START MANUAL** – This topic will be covered in the next section.

➤ **ATTEMPTS** – After clicking the attempts button, a window showing the complete attempt history of the call record is displayed. Detailed information is available for every call attempt. To read the complete attempt message, double-click the call attempt.



➤ **QUEUE** – The queue is a list of call records available to each interviewing station. Each station has a unique queue. Generally, the Sample Manager will select the appropriate call record so you will not need to choose another through the Queue. However, if you are about to take a break or change studies, you can check the Queue to see if you have any pending callbacks.

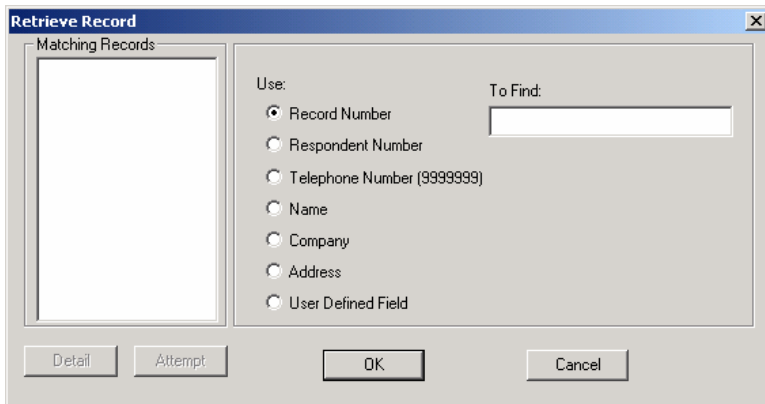


**Priority**  
**0=Immediate Attempt (In use)**  
**1=Definite Callbacks**  
**2=Indefinite Callbacks**  
**3=No answer Callbacks**  
**4=Busy signals**  
**5=Misc/Priority 5 sample**  
**6=General Sample**

**Detail** – displays call history information for call record  
**Attempts** – displays complete call attempt history

## WinCati / Interviewer Options (cont.)

➤ **RETRIEVE** – This option allows the interview to retrieve a call record based on a known piece of information. If an interview is ended prematurely, this option can be used to retrieve it.



➤ **TRANSFER** – This option is rarely used by the SRC. It allows interviewers to transfer call records between each other – a feature generally only needed for multilingual studies.

➤ **RETURN** – If you receive a call record that you believe should not be called (based on attempt history or attempt messages), this option will return the call record to the general sample without attempting it. It is important to notify a supervisor when you return a call record so that the problem can be corrected.

➤ **LOGOFF** – See Logging out section on 6-8.

After reviewing the call history and call attempt information, use the “Start Manual” button to start the interview. Pressing the “Start Manual” will display an “Introduction” screen similar to that below. The top half of the introduction screen displays relevant call record information and the bottom half displays the script to be used when contact is made.

The screenshot shows the WinCati software interface. At the top, there is a header bar with the text "WinQue" and a window control icon. Below the header, the word "hello" is displayed. The main area is divided into two sections. The top section displays call record information in a grid-like format:

Phone Number:	717-705-8107	Attempt Number:	3	Record #:	174
Contact Name:	Teia Prowell	Last Disposition:	53	Start Time:	02:53
Company:	Hansel & Gretel	Last Interviewer:	TT	Callback Time:	
Quota Call:		Time Last Call:	04:51 PM	Callback Date:	
Respondent #:		Date Last Call:	04/06/2003	preferred	Monday - Fri

Below the call record information, there is a message field with the text: "Message: Teia's answering machine at work call back during the day when it is open".

The bottom section of the screen displays the interview script:

PARENT'S NAME: Teia Prowell  
CHILD'S NAME: Jailynn Prowell  
PHONE NUMBER: 717-705-8107

Hello, this is \_\_\_\_\_ and I am calling from the Penn State Survey Research Center.

Is Teia \_\_\_\_\_ available?

IF AVAILABLE - PRESS 1, IF NOT AVAILABLE - PRESS CTRL/END

At the bottom of the screen, there are two buttons: "Previous" and "Next".

**If a name is listed at “Contact Name”, a respondent has already been selected. Use information on this screen (such as attempt number, contact name, and message to convince the respondent to participate.**

The questionnaire automatically follows skips and branches based on the respondent's answers. While interviews vary greatly, the process of conducting interviews will stay largely the same.

### ➤ WAYS TO NAVIGATE / ENTER DATA

- Use NEXT/PREVIOUS BUTTOINS
- Enter numeric code and press enter
- Type open-ends – press enter twice if response area is more than one line
- If “OTHER” is selected, a message box may appear – type in answer

### **WinCati Quick Reference**

**F1 – Help** – Provides extra info about a question – if applicable  
**F3 – Back** – Moves to the previous screen  
**F4 – Message** – Press anytime to leave a message at that screen  
**\*\*\*Press F4 and leave message before entering a response to that screen**

## WinCati / Interviewing (cont.)

➤ **CTRL-END** – Pressing CTRL-END will terminate the interview at any point. Whenever an interview is terminated before completion, the interviewer must select a disposition code and leave a message explaining the disposition.

The WinCati system may not display the needed disposition – **always a good idea to check “display all disposition codes”**.

➤ **CALLBACK** – When an interviewer cannot complete a survey on the first call, a callback can be setup for a later time or date. Three dispositions will display the “schedule callback” window: callback, daytime callback, and partially complete.

**Callback** – When an interviewer has not designated a respondent or has not yet moved beyond the pre-screener questions.

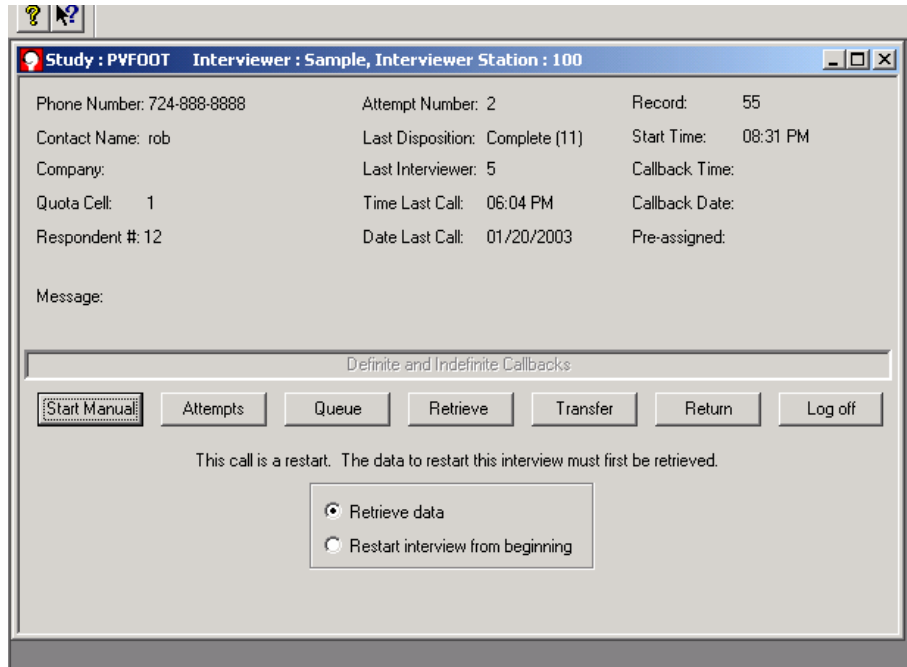
**Daytime Callback** – When a household is reached that only wishes to be contacted during the daytime. WinCati will prevent this call record from being dialed during evening interviewing shifts.

**Partially Complete** – When a respondent is selected and the interviewer has moved beyond the pre-screener questions. This disposition will setup a callback and restart the survey at the question where it left off.

**Definite** – The respondent (or contact person) has given you a specific date and time to callback – list the reason!  
**Indefinite** – The respondent (or contact person) could not give you a specific time to callback. Select a time based on your own instinct or information taken from the call – list the reason!

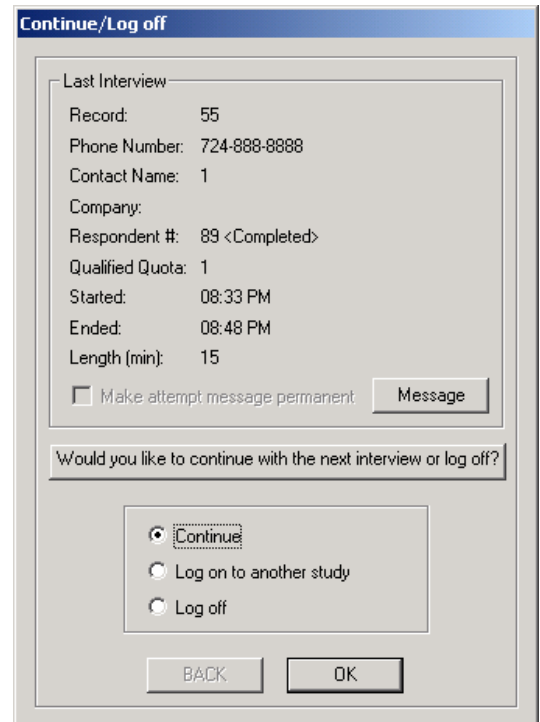
For multi-time zone studies, this indicates whether to callback at 5:07 PM in the interviewer’s time zone or the respondent’s time zone. **Always select the respondent’s time zone unless otherwise directed!**

➤ **RESTARTING AN INTERVIEW** – If an interview is terminated before the “screener” questions, the interview can only be restarted from the beginning. If an interview is terminated after the screener questions (that is, a respondent has been selected and started answering study questions), the interview can be restarted at the point it was terminated.



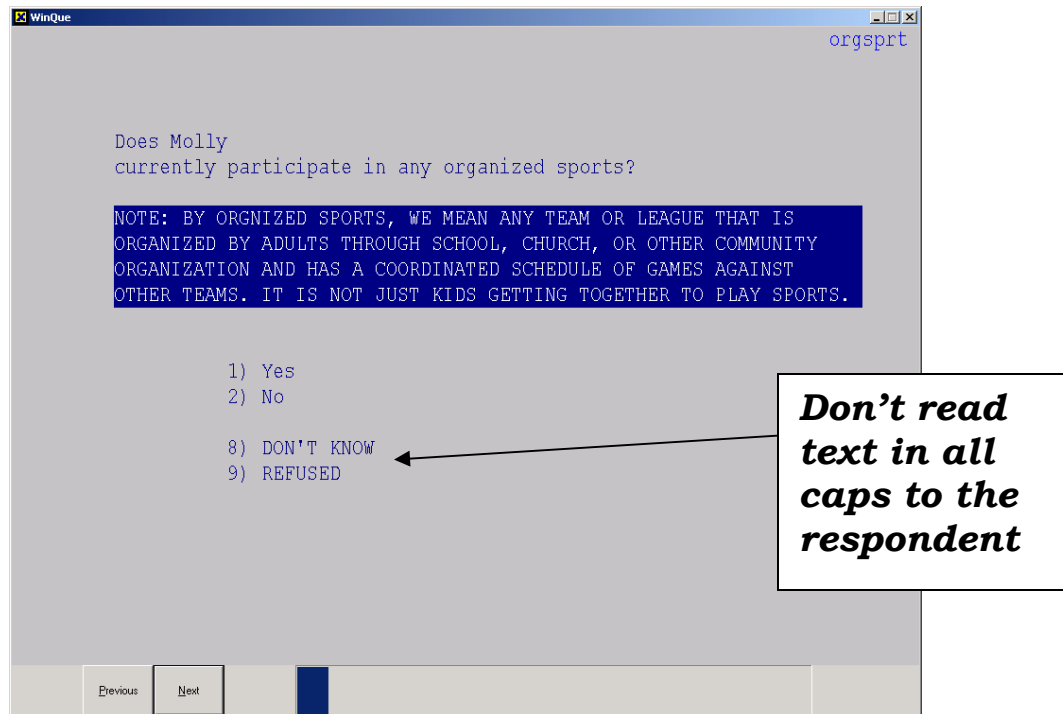
➤ **COMPLETING AN INTERVIEW** – The “complete disposition” is the only one that does not require pressing CTRL-END. After the interviewer finishes navigating the questionnaire, the interview window will close and the call record will automatically be designated complete. Often times, the questionnaire will include several questions for the interviewer to answer after disconnecting with the respondent.

*If a complete interview is ended with CTRL-END before all questions are answered, the interview must be retrieved and all questions answered.*

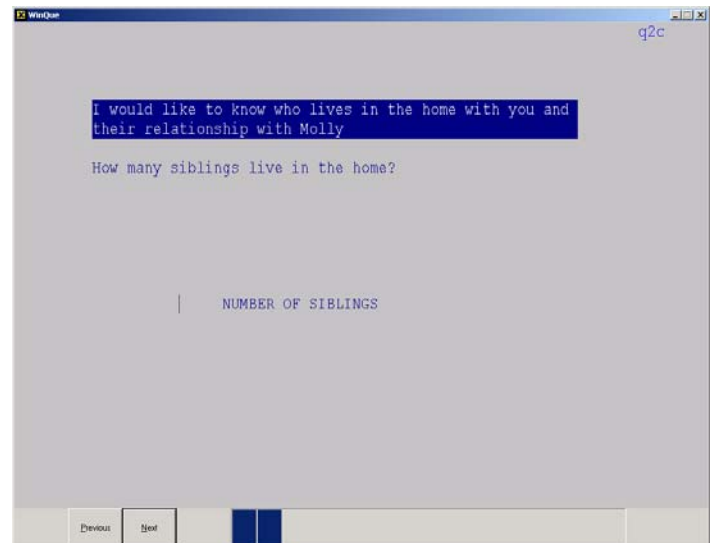
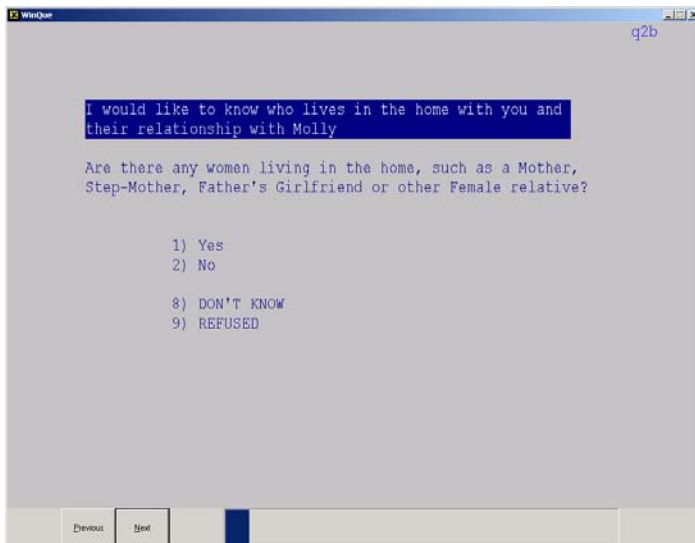


## WinCati / Cues to the Interviewer

*The graphical nature of WinCati allows the programmer of each questionnaire to provide visual cues to the interviewer. The SRC regularly uses the following effects to alert the interviewer.*



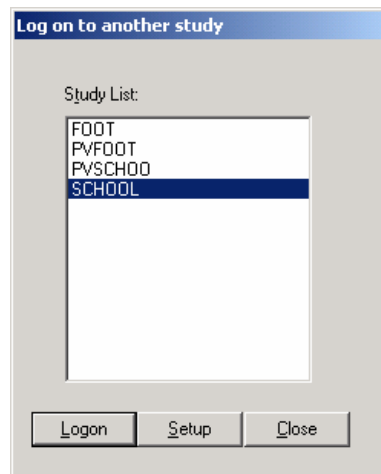
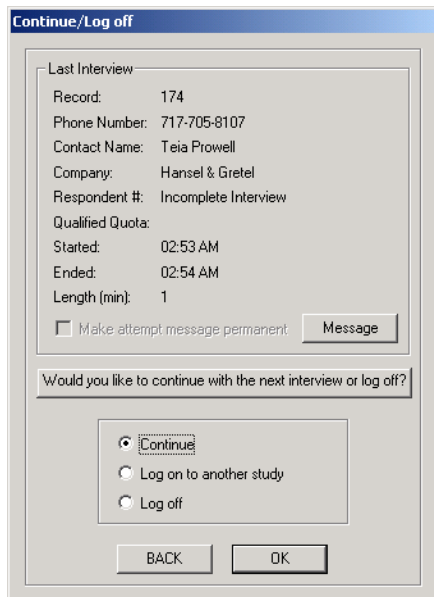
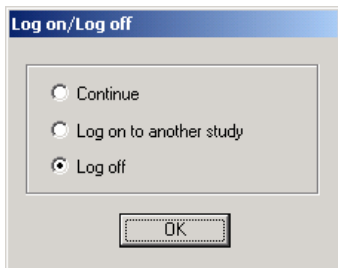
- *The above screen illustrates highlighted, capitalized text. This text is used to aid the interviewer if the respondent is uncertain what is meant by the term asked in the actual survey question.*



- *These screens indicate highlighted text that is not capitalized. This effect is used when several questions start with the same introduction that may not need to be read to the respondent after the first couple times. Sometimes colored text will be used instead of highlighting to relay information to the interviewer that should not be read to the respondent.*

## WinCati / Logging Out

Interviewers can logoff from the main Study window or the Continue/Logoff window that appears at the end of each call attempt. At either point, interviewers can also choose to logon to another study.



When selecting logoff, WinCati will automatically close and return to the Windows desktop. Selecting “Shutdown” from the Start menu will automatically logout the WinCati ID and turn off the computer. The monitor will need to be turned off manually.

