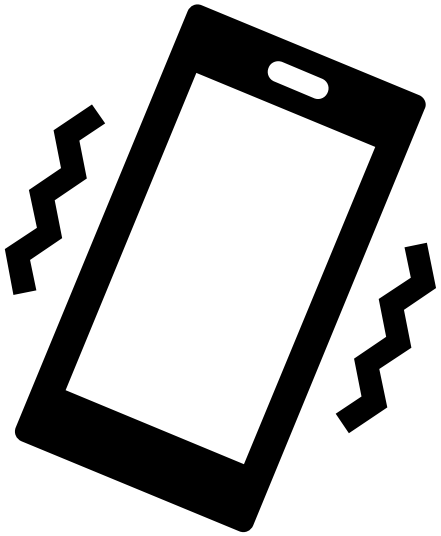
CAPI Call Pooler Project:
Enhanced CAPI Pooler Features

NASDA Training
May 21, 2024

Data Collection Branch

Mobile Survey Services Section



Administrative

Please use project code 380 for this training.

Once June Crops APS data collection begins, you will use project code 123.

CAPI Pooler Overview

The CAPI Pooler is a web-based application designed to streamline data collection efforts for Computer Assisted Personal Interviewing (CAPI) surveys.

- Manages case assignments for enumerators.
- Tracks data collection progress.
- Allows for centralized oversight and quality control.
- Enables efficient call-back management

Calling Instructions

While you are working:

1. The goal is to call through all 25 records assigned to you in each “Calling Batch”.
2. Avoid phone number research: Do not spend time researching phone numbers. Use the provided contact information.
3. Document effectively: Leave detailed notes about each interaction, and any relevant information you gather for each calling attempt inside the “Notes” box.
4. Check records thoroughly: Carefully examine each record before moving on to the next one.
5. If you need to stop calling, please check back in the records before exiting the application.

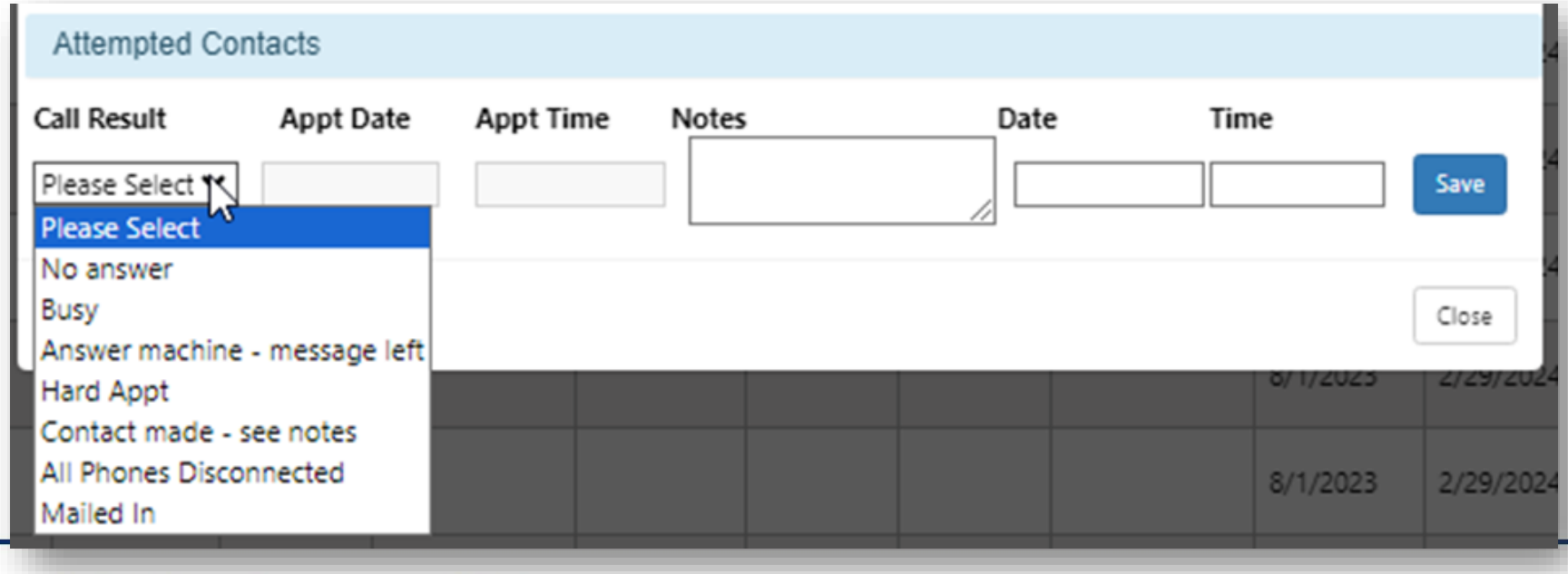
Calling Instructions

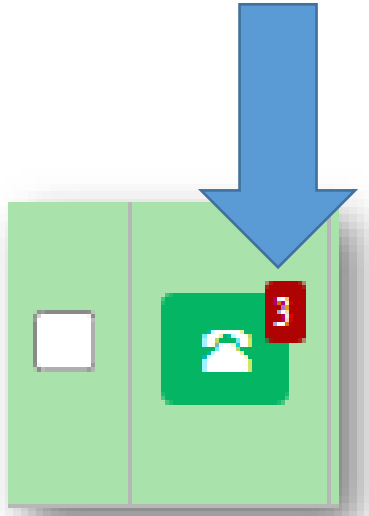
1. Aim for 4-8 touches per record: Strive to make 4-8 attempts to connect with each respondent.

- Goal is to efficiently work through the assigned records, and gather as much information as possible. By following these instructions and using your time effectively, you can successfully complete this task.
- Check in with your Supervisor as often as they require, or periodically during calling.

Update Call Result Box

After **each** attempt to contact a respondent, enumerators must enter a "Call Result". This is needed for sorting, and to keep track of the number of attempts made for the badge indicator.

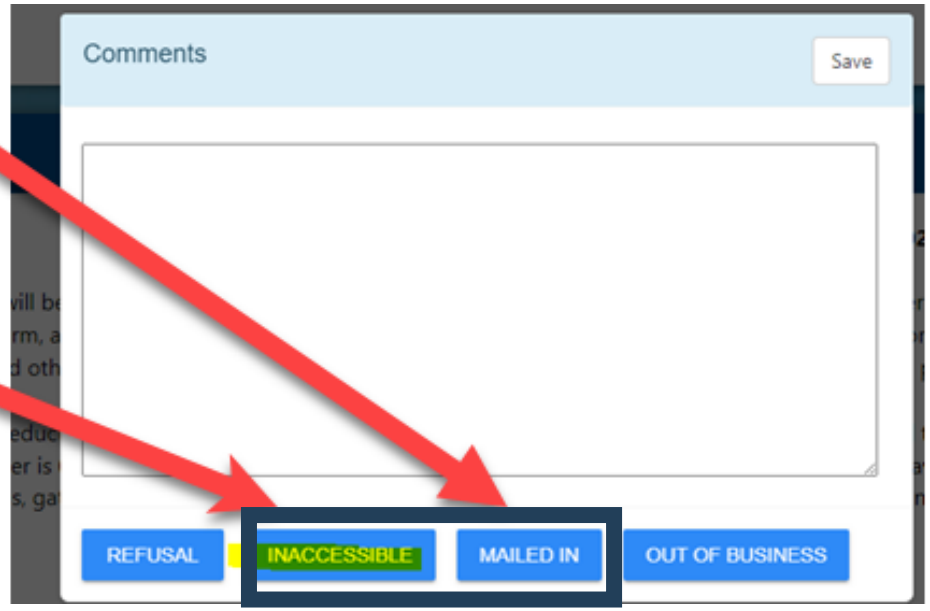




Important Reminders for Interviewers

It is crucial to wait until you have successfully connected with the respondent on the phone before initiating the survey.

AVOID using the Inaccessible and Mailed In Button inside the Questionnaire



March Training Documents

Resources available on the CAPI Dashboard:

- March Crops APS Pooler Training Video Link
- March Crops APS Pooler Training PowerPoint Link
- CAPI Pooler NASDA Manual Link

March Crops APS - NASDA Feedback

34 responses to the feedback form

Desired User Interface Improvements

- **Button Placement:** Several users suggested improvements to the user interface to avoid accidental clicks. This included separating the "Check In" button from other buttons.
- **Call Back Management:** Users requested a searchable phone number function to locate specific contacts within the application.
- **Hard Appointment Management:** Supervisors requested a “hard appointment” manager option.

New Features

Enhanced CAPI Pooler Features:

We are pleased to introduce significant enhancements to CAPI Pooler specifically designed to improve data collection efficiency and effectiveness for the June Crops APS. These enhancements include:

New Call-Back Feature: This innovative functionality streamlines the scheduling and management of follow-up calls, demonstrably increasing respondent reach and survey completion rates.

Hard Appointment Manager (Supervisors): User-Friendly Interface for managing and/or reassigning Hard Appointments: CAPI Pooler's revamped interface simplifies the process of reassigning challenging appointments, fostering a more streamlined workflow for managing these situations.

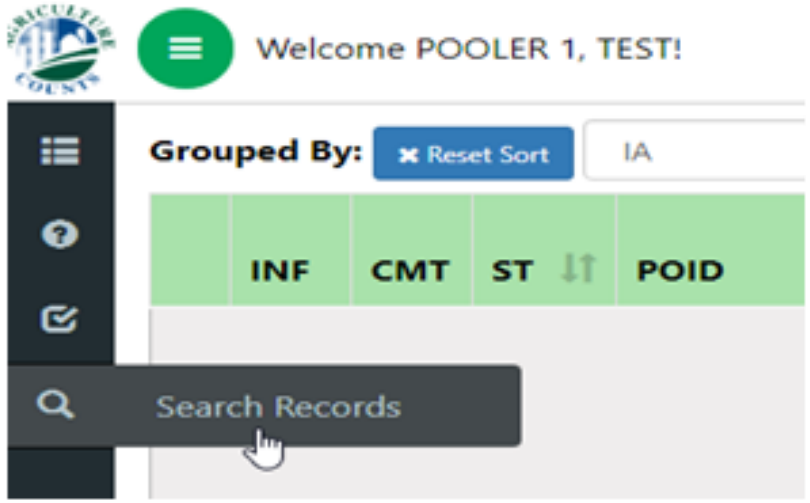
New Call-Back Feature

- Supervisors and enumerators can now search for a respondent's record in the Capi Pooler sample.
- When a respondent calls back due to caller ID, or from a return call from a message left on voice mail, you can find the record, check it out, then complete the interview.

New Call-Back Feature:

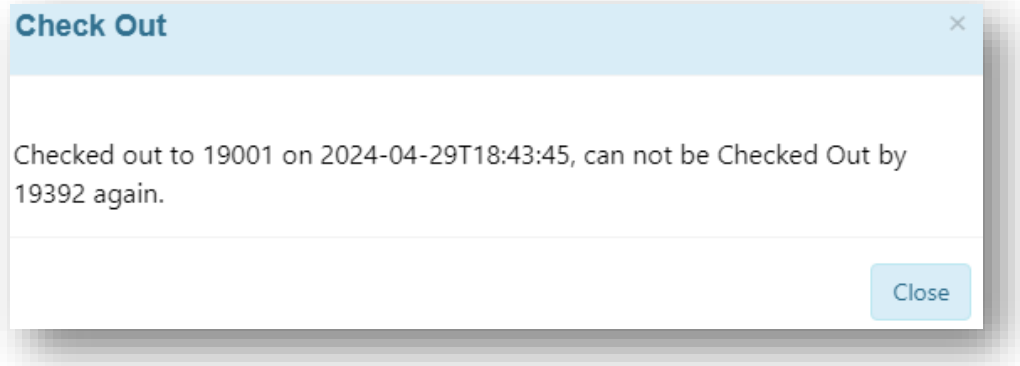
How to use the Search Feature:

Search using the magnifying glass option located on the side tab



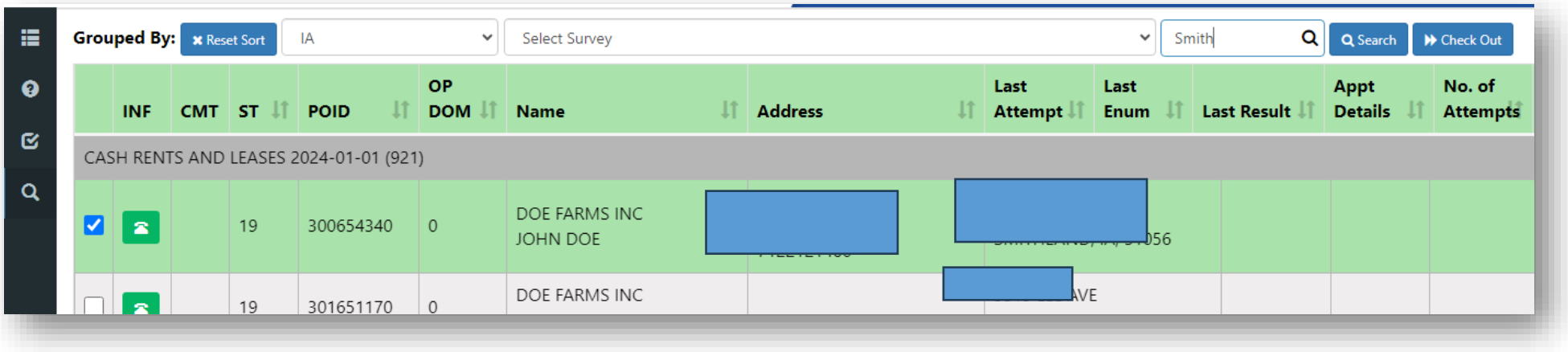
New Call-Back Feature:

1. Search on phone number, First or Last Name, or City. **POIDs can't be searched**.
2. Select survey, if known, but not required to run the search.
3. All records matching your search will display in the current search pane area.
4. Find the record, select the checkbox, then touch check-out.
5. Only one record can be selected and checked out at a time from search results.
6. If the record is currently checked out by another enumerator, a pop-up will appear. This will let you know who has the record in their batch.



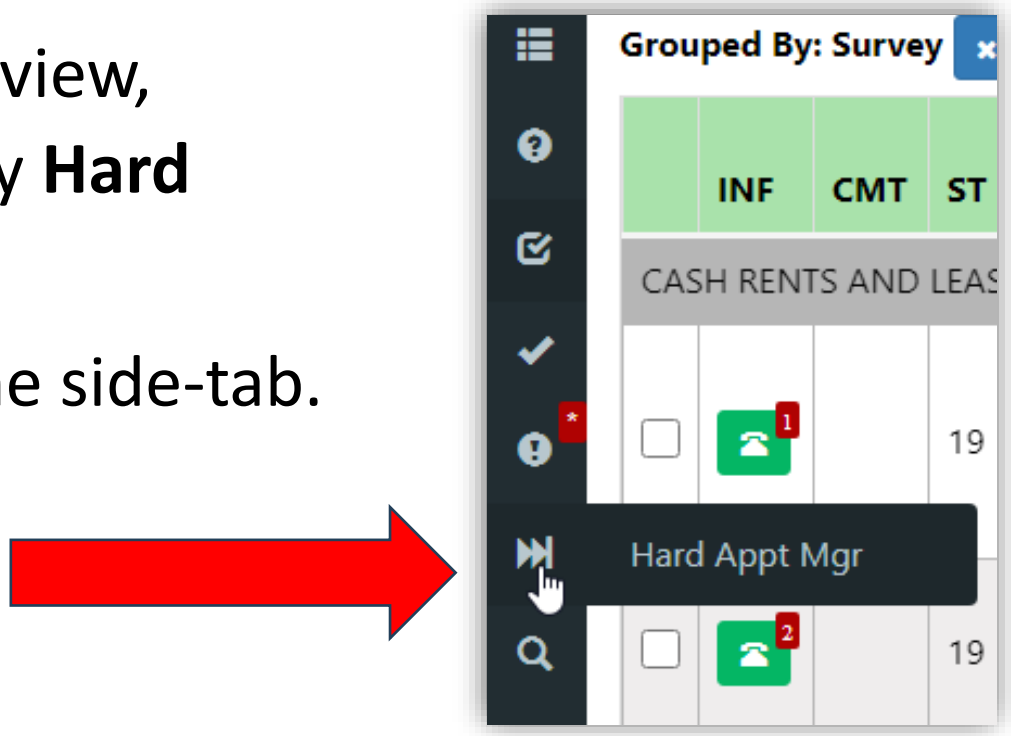
New Call-Back Feature:

Once the record is checked out, you will be auto re-directed to your current batch listing to complete the survey or enter data:



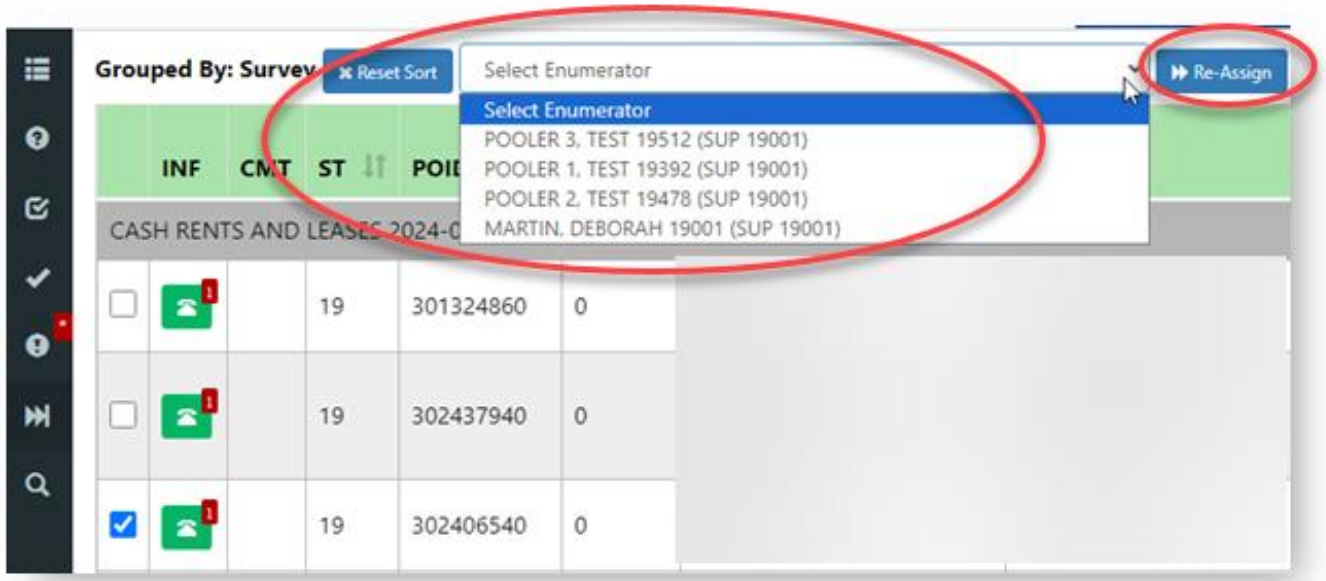
Hard Appointment Manager

- Supervisors now have the ability to view, manage, and if needed, reassign any **Hard Appointments** made by their staff.
- Supervisors will see a new tab on the side-tab.



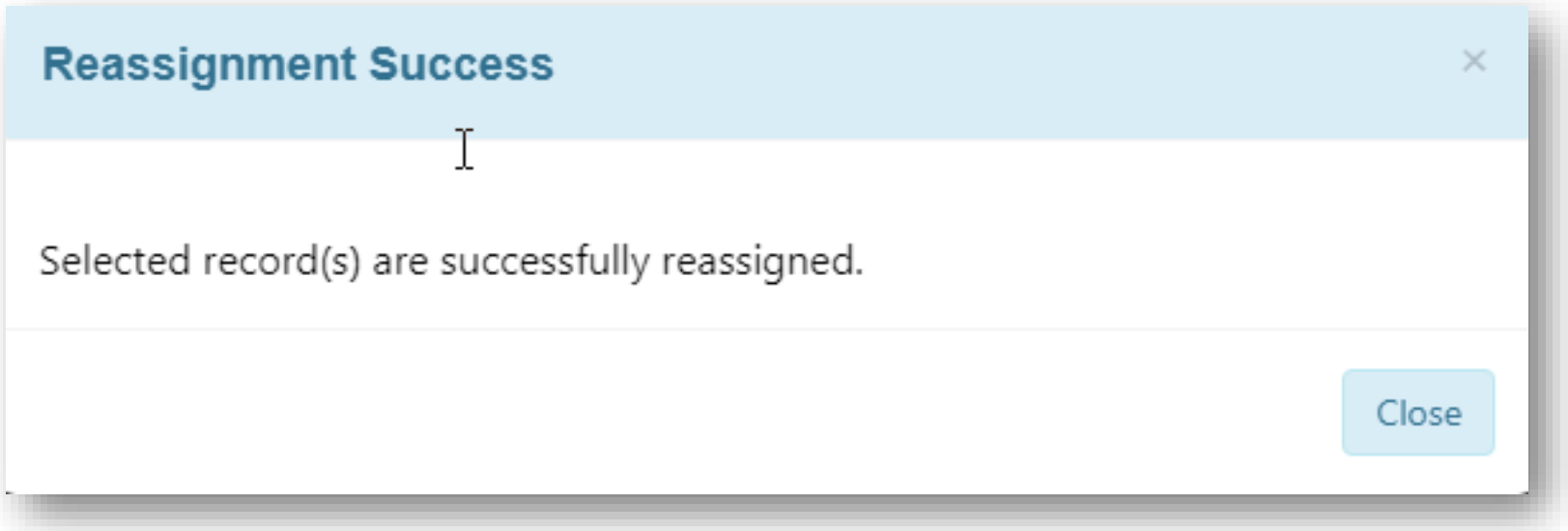
Hard Appointment Manager

- This will show a complete view of All Hard Appointments that were made by you and your staff.
- These may be periodically viewed, and if the need arises, the supervisor can re-assign them to themselves, or to other enumerators in their supervisor group.
- **Check the box by Hard Appt**, and **select the dropdown box to select the enumerator** to move it to
- Select **Re-Assign.**



Hard Appointment Manager

If successful, you will see this pop-up:



Accessing the Pooler using CAPI URL Using Chrome

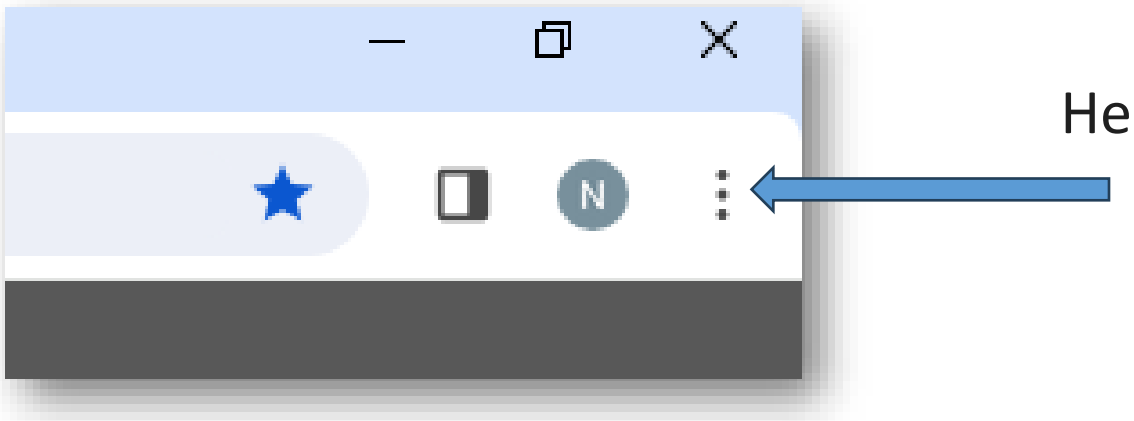
1. Open CAPI Dashboard at:

https://sites.google.com/view/capidashboard/home

2. Use the links provided there for CAPI or CAPI Training.

Accessing CAPI Call Pooler using CAPI URLs (Using Chrome)

Before logging into CAPI Call Pooler, it is crucial to clear the History or “cache” in your Chrome browser.

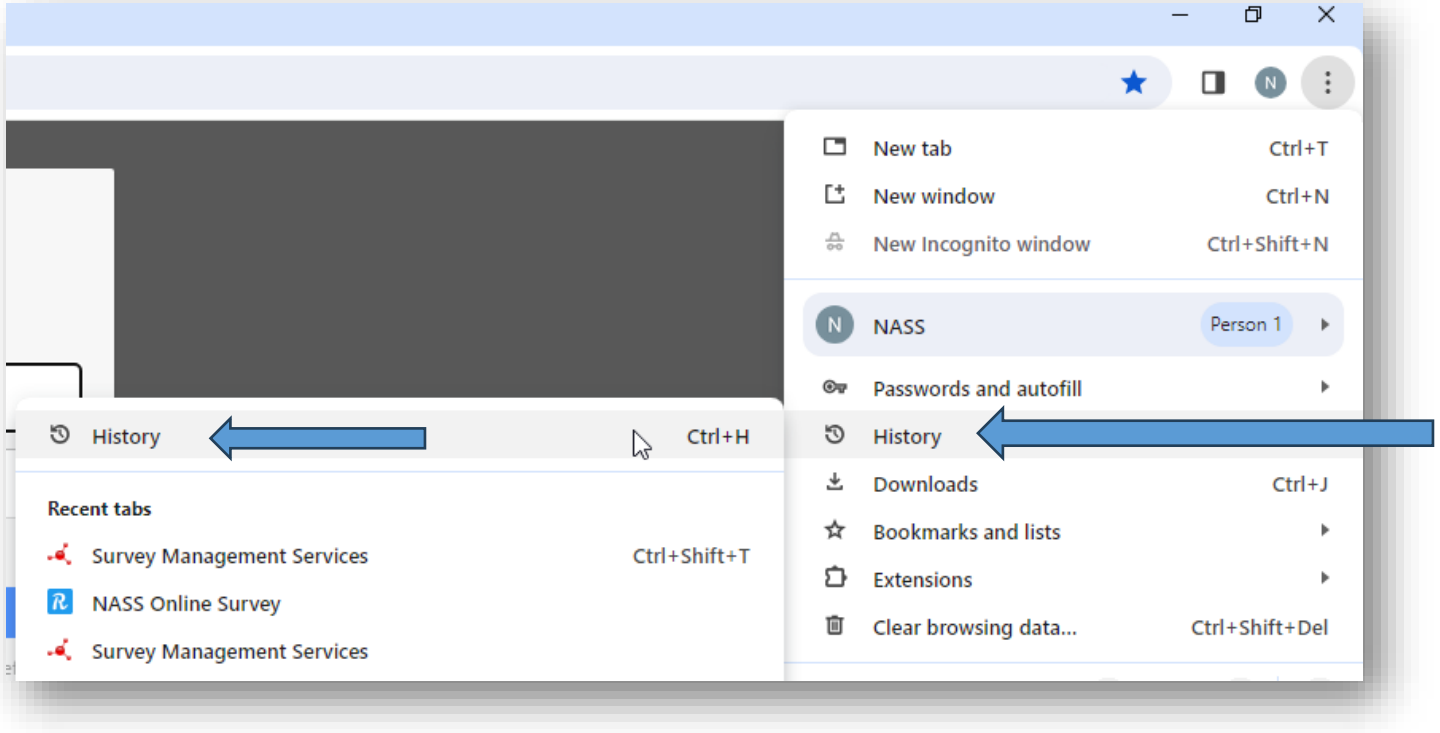


Here is a Step-by-step guide:

1. Launch Google Chrome on your computer.
2. In the top right corner, click the three dots.

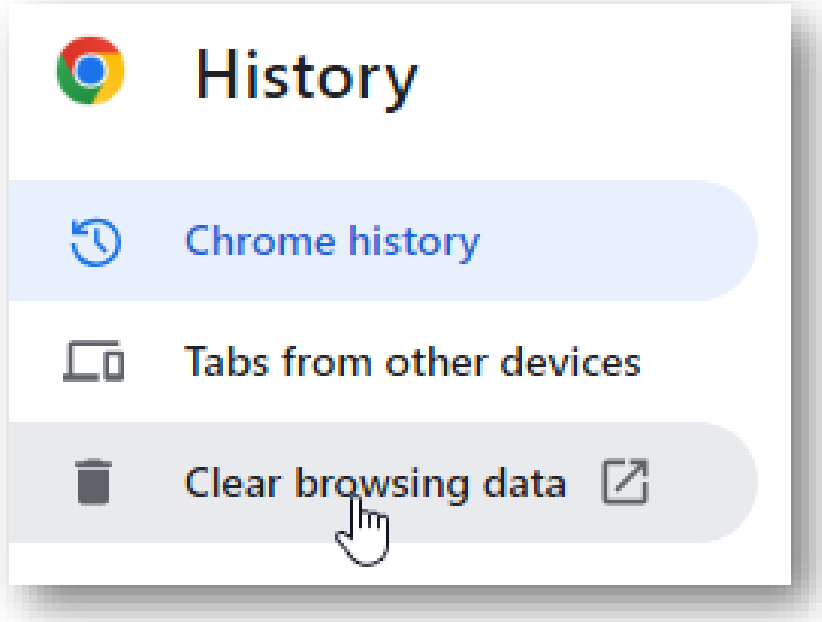
Accessing CAPI Call Pooler using CAPI URLs (Using Chrome)

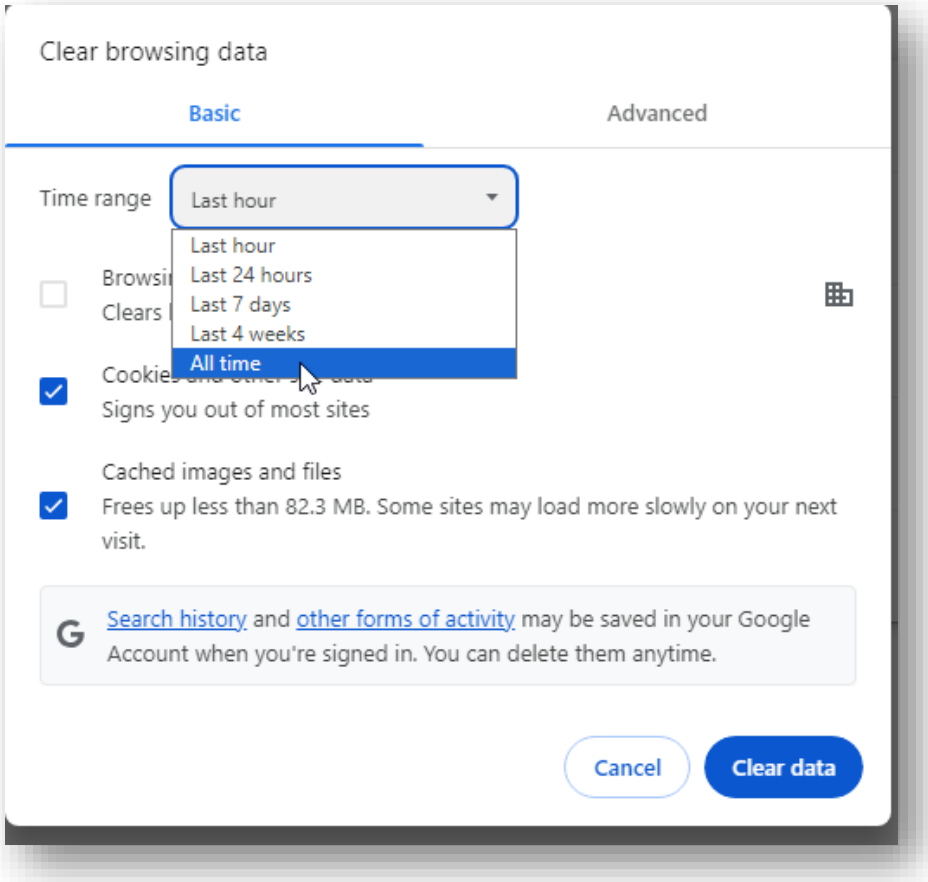
3. Select History, then slide your mouse over to the left select History again.



Accessing CAPI Call Pooler using CAPI URLs (Using Chrome)

4. Clear Browsing Data
5. Clear Data





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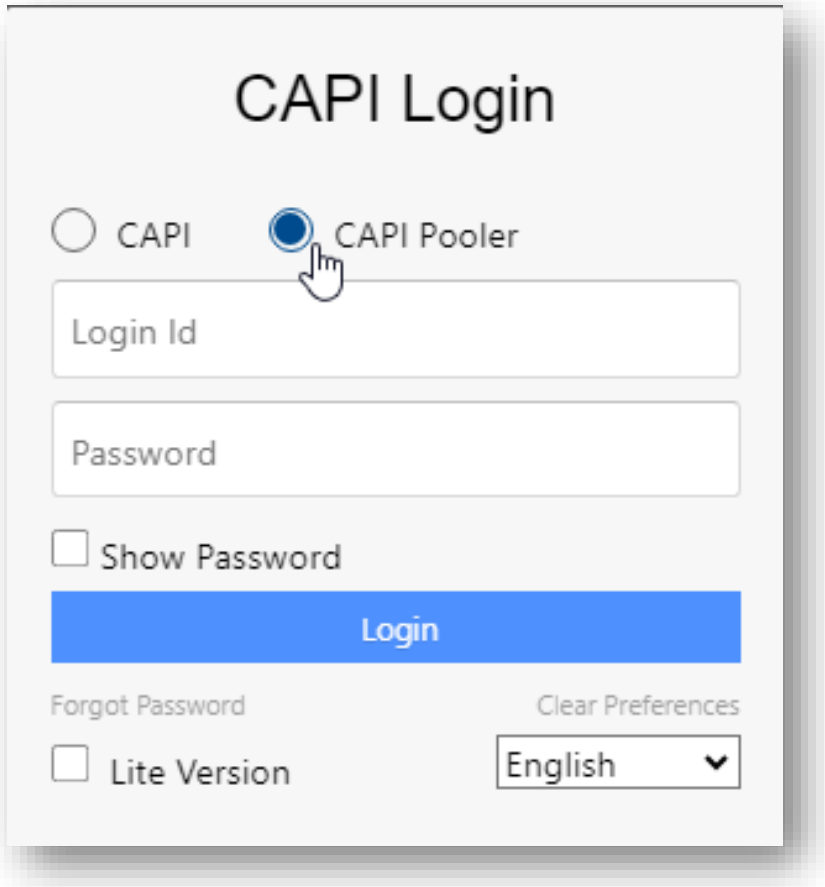
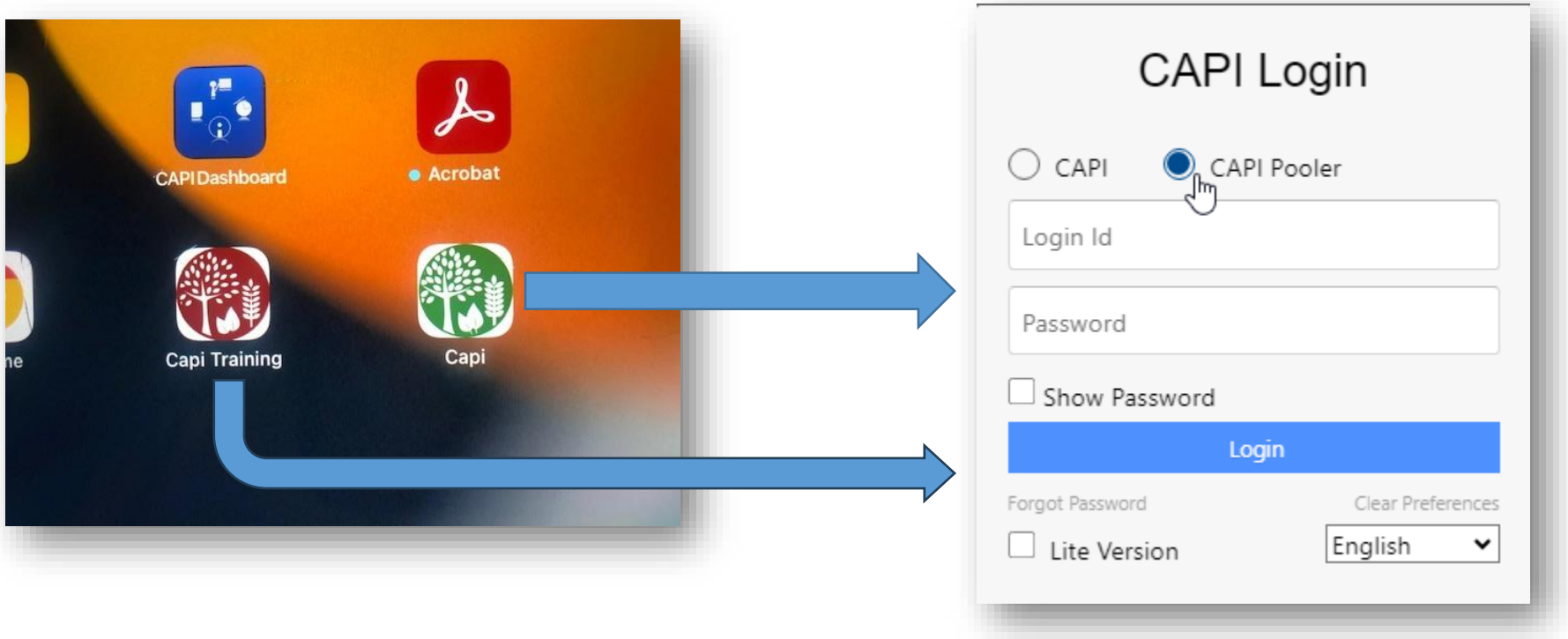


Accessing the Pooler using CAPI Apps on iPad

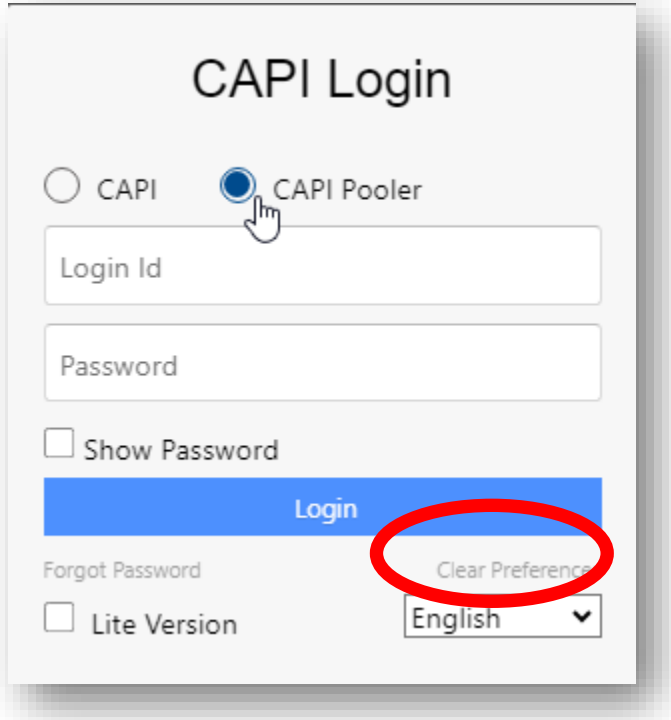
Open the CAPI App on the iPad as you would for regular CAPI:



Accessing the Pooler using CAPI Apps on iPad

It is good practice on the iPad to go here at least once to clear history (cache):

- Settings
- Safari
- Clear History and Website Data
- Then open the CAPI App on the iPad as you would for regular CAPI
- Then Clear Preferences



Protocol for Reporting Pooler Issues if They Arise

Enumerators should mention the following when reporting issues to their supervisor. These will flow through to the RFO staff, then to the Pooler Team:

- Enumerator's Name and 5-digit EnumID
- State they were calling in
- Survey they were calling on
- POID(s) affected if possible
- Brief description of the Issue
- Whether they were using the iPad App **or** the URL.
- If possible, a snip can be sent but no PII!

Demo (New Features)