A young boy in a classroom, wearing a grey and blue shirt, has his right hand raised. He is looking towards the right of the frame with a slight smile. In the background, another child is partially visible, holding a white object. The setting appears to be a classroom with a chalkboard in the distance.

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On Behalf of the HCS Study Team

Using Prepackaged Software to Schedule Field Interviewer Appointments

International Field Directors & Technologies

2015 Annual Conference

Introduction

- For a five-year observational study, we were tasked with recruiting families throughout the United States and collecting interview and anthropometric data from children and their primary caregiver(s).
- Families were recruited through schools, screened by our telephone center, and interviewed by a local Field Data Collector (FDC).
- Local FDCs were hired in each community, and Field Supervisors oversaw the FDCs remotely.

National Study

- 40 states
- 130 communities
- ~5,000 Household Interviews
- 200 Field Data Collectors
- 10 Field Supervisors (5 Battelle Full-Time staff and 5 Temporary Part-Time former FDCs)

Household Interview Requirements

- Participant Consent
- Medical Record Review Form
- Anthropometric Measurements
 - Child, Primary Adult, Secondary Adult
 - Height, Weight, Waist Circumference (*Child Only*)
- Computer Assisted Interview (CAI)
- ASA24 Questionnaire
- Accelerometer Distribution/Collection
- Incentives
- **Each interview took approximately two hours**

Interview Scheduling Requirements

- We wanted telephone interviewers (TIs) to schedule FDC appointments, so the FDCs could spend their time interviewing.
- TIs needed to be able to remotely schedule an appointment with an FDC who was local to the participant's community.
- We wanted to use an existing software package to help us schedule and manage field staff, due to competing priorities for programming staff.

Ideal Software

- Will allow 18-25 TIs to schedule appointments for home visits
- Allow managers to assign communities and schedules for FDCs
- Allow TIs to take into account FDCs communities and schedules
- Allow programmers to retrieve data in automated manner to feed into FDCs system
- Well-tested product that is used for multiple purposes

Software Choice

- We chose a product called Service CEO
 - <http://www.insightdirect.com/>
 - Office locations in Boston, San Francisco, Phoenix, and Los Angeles
- We used this software for a previous study (2006), so we were somewhat familiar with it.



Service CEO Advantages

- Can assign FDCs to work in specific communities/zones
- Can assign FDCs for specific interview types (standard/enhanced)
- Can assign equipment (accelerometers) as “appointments” so as not to overlap

Team Name	Active
Data3 Collector3 Accelerometer2	<input checked="" type="checkbox"/>
Data4 Collector4	<input checked="" type="checkbox"/>
Data4 Collector4 Acc 1	<input checked="" type="checkbox"/>
Data4 Collector4 Acc 2	<input checked="" type="checkbox"/>
Data5 Collector5	<input checked="" type="checkbox"/>

Step 2: Check all FDCs & Zones you wish to associate with this Team

Show only unassigned FDCs & Zones

FDCs & Zones | Household Types | Categories | Appointment Types | Substatus

FDCs

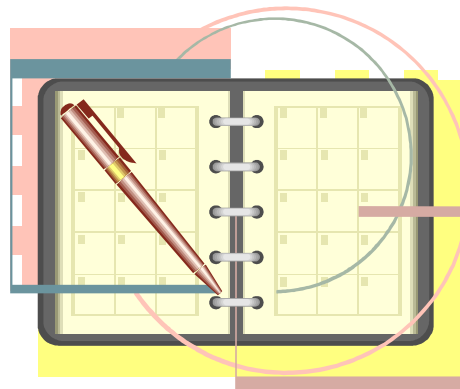
Field Data Collector
<input type="checkbox"/> Data2Collector2 Accelerometer2
<input type="checkbox"/> Data3 Collector3
<input type="checkbox"/> Data3Collector3 Accelerometer1
<input type="checkbox"/> Data3Collector3 Accelerometer2
<input checked="" type="checkbox"/> Data4 Collector4
<input type="checkbox"/> Data4 Collector4 Acc 1
<input type="checkbox"/> Data4 Collector4 Acc 2
<input type="checkbox"/> Data5 Collector5
<input type="checkbox"/> Data5 Collector5 Acc 1

Zones

Zone
<input type="checkbox"/> 955
<input type="checkbox"/> 956
<input type="checkbox"/> 957
<input type="checkbox"/> 958
<input type="checkbox"/> 959
<input checked="" type="checkbox"/> 960
<input checked="" type="checkbox"/> 961
<input checked="" type="checkbox"/> 962
<input type="checkbox"/> 963

Service CEO Advantages, cont.

- Can specify FDCs schedule based on individual availability
 - By week
 - By day



Default Work Day Instructions

1 To add hours, first click on a start time within a day and drag to the desired end time.

2 Select a status from the drop-down list. You can adjust the time by dragging the top/bottom of the bars.

Time Code:

Start Time:

End Time:

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7:00 AM							
8:00 AM	Available (Available, Unpaid)	Available (Available, Unpaid)	Available (Available, Unpaid)	Available (Available, Unpaid)	Available (Available, Unpaid)		
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM						Available (Available, Unpaid)	
4:00 PM							
5:00 PM							
6:00 PM							
7:00 PM							
8:00 PM							
9:00 PM							
10:00 PM							

Override Instructions

- 1 Select date(s) to view, modify, or remove work hour overrides.
- 2 To add hours, first click on a start time within a day and drag to the desired end time.
- 3 Select a status from the drop-down list. You can adjust the time by dragging the top/bottom of the bars.

Time Code:

Time Off (Unavailable, Unpaid)

Start Time:

End Time:

All Day

◀ May 2015 ▶

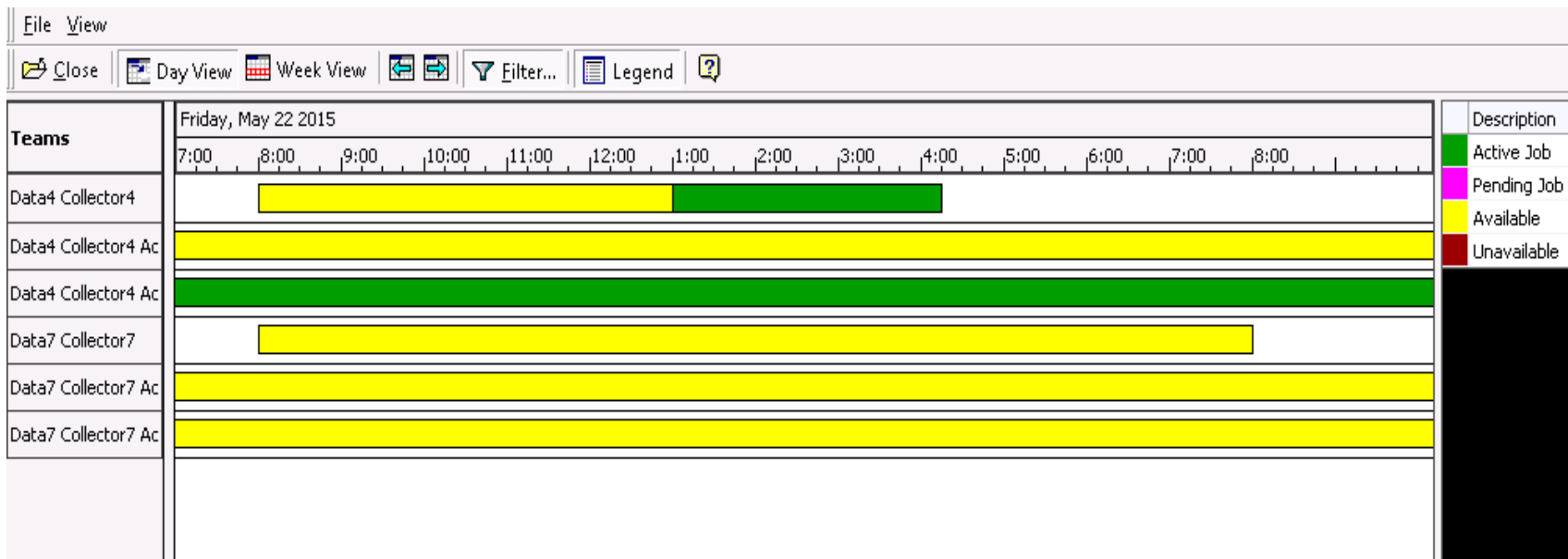
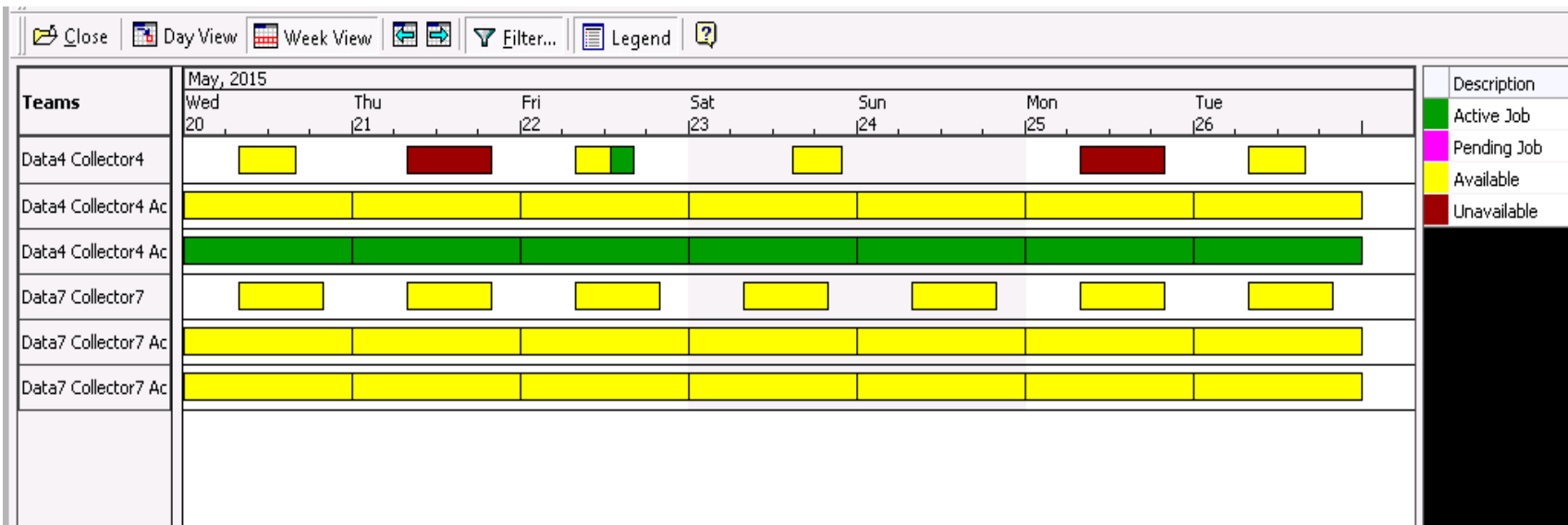
Sun	Mon	Tue	Wed	Thr	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

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6 :00
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:30

Time Off (Unavailable, Unpaid)

Service CEO Advantages, cont.

- TIs can see when FDCs are available
 - Only FDCs who are able to work in the community of the participant are listed
 - Shows available time, scheduled time, and unavailable time
 - Viewable by day and by week



Service CEO Advantages, cont.

- Cases could be easily moved from one FDC to another by supervisor, and existing schedule and communities could be overwritten
- Software could be shared (used) by users in multiple telephone centers at the same time

Service CEO Challenges

- Learning curve



- Software slowness
- Too many features for our purposes
- Software didn't store historical data as well as we would have liked

Service CEO Challenges, cont.

- Scheduling appointments for Spanish speakers
- Schedule/availability issues if FDC:
 - Had no routine weekly schedule
 - Had a future-dated availability change
- Appointment conflict warning messages difficult to understand

Conclusions

Overall, this product served our purposes and we would probably use it again.

Thank You for Your Time

Questions?

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