

DialVision

Chapter 3: DialVision Functions

The DialVision Call screen

The DialVision Call screen shown below is displayed to the caller just before the interview with the Respondent is about to begin and again when the interview has been terminated and the Survey instrument returns the caller to this screen. In either situation, from this screen the caller can attach a 'disposition' or 'outcome' to the Respondent's case.

The most common call 'dispositions' are available to the caller on the left side of the screen in the middle of the column. The red buttons, **'Hang Up'** and **'Done'**, allows the caller to terminate the telephone connection and wrap up the current Respondent's case. The yellow buttons, just below the red ones, allow the caller to immediately attach a frequently used 'disposition' to the call.

Note: The yellow disposition buttons describe the telephone connection outcome, rather than the results of the interaction with the Respondent.

Address
Phone 1: (XXX) XXX-7322

Email:
Prospect: 10:06 AM Eastern
Employer:
Spouse Employer:

Dataset: NOAA
Campaign: ALDS
List: Sample List
Resume Script: NOAA CHTS SCRIPT

NOAA SURVEYS
Project Director: Kathleen Carr
1-800-341-3660
EMAIL CHTS & ALDS: noaa@chr.osu.edu
PHONE CHTS & ALDS: 1-866-563-6904
WEB SITES: www.noaa.gov www.chrr.osu.edu

Household ID: 6144427322
Region of Residence: Northeast
State of Residence: Ohio
County of Residence: Franklin

CHRR TECH SUPPORT:
1-866-456-0506
noaattech@chr.osu
noaaahelp@chr.osu
TOTAL INTERVIEWS
TOTAL REMAINING

Calling: COLUMBUS, OH
Last Outcome:

Hang Up Done

Ans Machine Busy Signal
Dialing Error Disconnected
Fax Machine No Answer
Recall

Favorites
Call Back Last Question
Call History Caller Notes
Rebuttals Quick Facts
Outcome ALDS SURVEY
PARTIAL MAPS
Manager

Perhaps you can assist me/ Hello,
I'm calling to conduct a survey for the National Marine Fisheries Service of the U.S. Department of Commerce.
INTERVIEWER: For HAWAII please read :
Perhaps you can assist me/ Hello,
I'm calling to conduct a survey for the State of Hawaii's Division of Aquatic Resources and the U.S. National Marine Fisheries Service.
INTERVIEWER: For all states

SPEAKING TO ADULT
ADULT UNAVAILABLE SET
CALLBACK

Prospect History Financial Info Outcome

Caller: Alla

Disposing a call or choosing an outcome

As mentioned above, there are two ways to describe the results of a telephone call:

1. The physical disposition of the call.
2. The outcome of a conversation with a contacted person.

The first way to quickly dispose of a call is to click **'Hang Up'**, then choose from the list of commonly used outcomes from the yellow buttons just below the hang up button. The call will immediately be disposed.

The second way is to click **'Hang Up'**, then click **'Done'**. A list of all the outcomes available will appear as shown below. Highlight the outcome (i.e. Recall) that is applicable to your call then click **'Save'**.

This second option includes all the possible dispositions of the telephone connection displayed in the yellow buttons, as well as, 'outcomes' due to an interaction with the individual who answered the phone call.

The screenshot displays a web browser window with the URL <https://www.moonfireasp.com/DialVision/SetDialer.asp?uld=89072A42-E6AC-4C6D-8154-23C4C50A52C6>. The interface is divided into several sections:

- Header:** Includes fields for Email, Prospect (10:06 AM Eastern), Dataset (NOAA), Campaign (ALDS), List (Sample List), and Resume Script (NOAA CHTS SCRIPT).
- Navigation:** Buttons for Outcome, Call Back, Follow Up, and Caller Notes.
- Select Outcome:** A central dialog box with a list of outcomes including Ans Machine, Busy Signal, CallBack, Complete, Deceased, Dialing Error, Disconnected, DISPO No Fishing in HH, DISPO No Permanent Residence, DISPO Wrong county, DISPO Zero 12 months Anglers in HH, DISPO Zero 2 month Anglers in HH, Fax Machine, Language Barrier, No Answer, Op Intercept, Privacy Manager ON, Refusal, Reschedule, Respondent not available during study, Terminate resistant, and Too Ill or Hearing Impaired. A 'Save' button is located below the list.
- Call Record:** Shows 'Idle...' status, 'Calling: COLUMBUS, OH', and 'Last Outcome:' with buttons for Hang Up and Done. Below are yellow buttons for various outcomes: Ans Machine, Busy Signal, Dialing Error, Disconnected, Fax Machine, No Answer, and Recall.
- Call Information:** Total Dollars Surveys: \$0.00 and Call Back Date & Time.
- Footer:** Buttons for Prospect, History, Financial, Info, and Outcome.

On the above screen you will also note two other tabs next to the Outcomes tab: **'Call Back'** and **'Caller Notes'**. The labels of these two tabs are also displayed as buttons under the Favorites list. Often these features are used in combination with the disposition or outcome of a call and may be readily accessed upon selection of an outcome.

The Favorites list

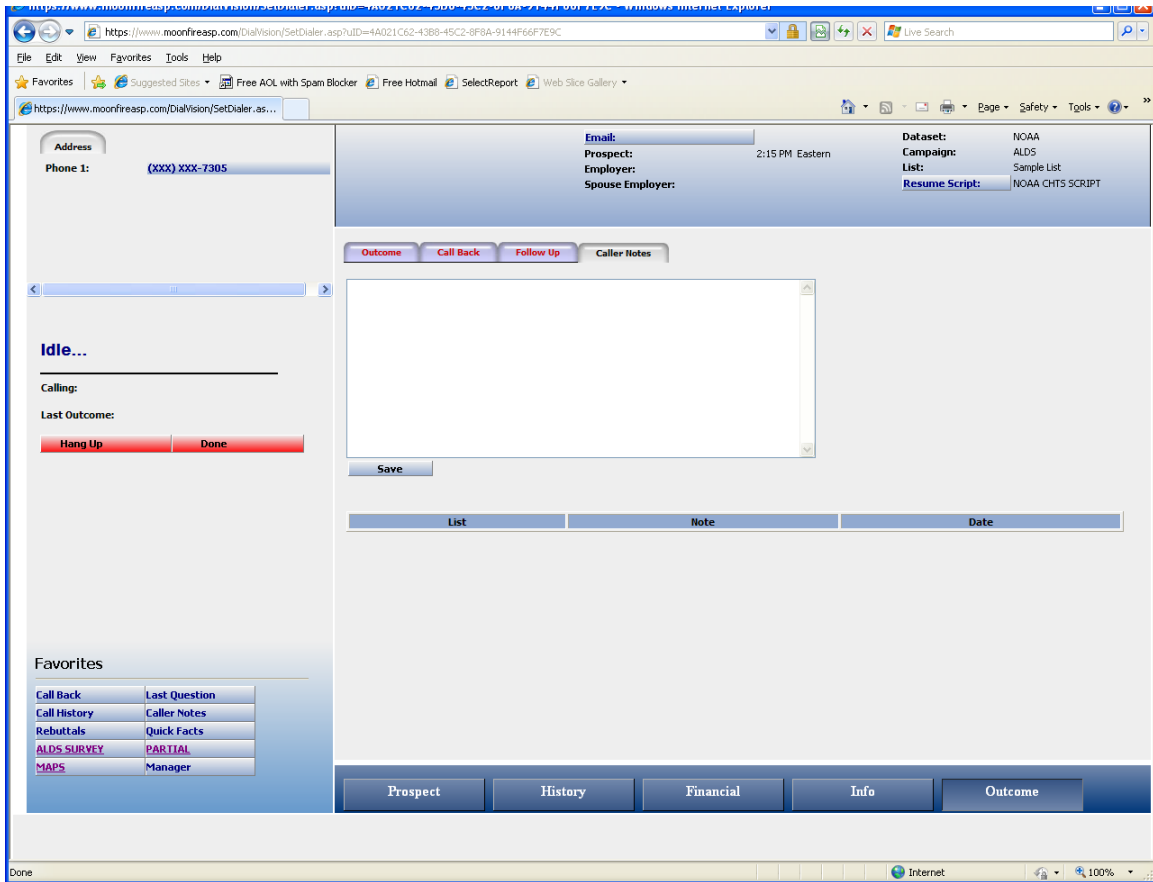
In the lower right corner of the DialVision call screen there is a list of buttons called **Favorites**. From this list the caller can quickly navigate to any of DialVision's functional screens that display demographic information about the respondent, as well as, document the telephone contact with the respondent's household. The caller can also launch the Survey software from this menu. When one of these buttons is chosen, tabs may appear in the middle section of the screen that bear a relation with the button selected. In addition to these **Favorites**, several tabs appear across the bottom of the screen. What appears here often depends on the favorite button selected. During training the caller should familiarize herself with the layouts of these screens.

The **Favorites** buttons will be discussed below and the various tabs will be noted only when they appear along with the favorite button selected.

Caller Notes tab and button

At the end of a call the caller will be required to choose an outcome describing the call. When the Outcome list appears on the screen, the '**Caller Notes**' and '**Call Back**' tabs will appear in the middle of the screen next to the '**Outcome**' tab. Depending on the outcome of a call, a caller may want to complement the outcome with an explanation describing a variety of aspects of the interview situation, circumstances of the interview, state of the telephone connection, etc. The '**Caller Notes**' tab that appears with the '**Outcome**' tab allows a caller to conveniently make any notes about a respondent or a call that another interviewer should be aware of. Each time a short note is recorded, DialVision will stamp the time and date, as well as the interviewer's name, listing the most recent comments first.

Before beginning a call, while preparing for the interview, it is a good idea to check the '**Caller Notes**' before contacting a case in the event that another interviewer has made some notes about the case. The '**Caller Notes**' screen is displayed below in which the caller may view any notes left and/or leave instructions or comments for the next interviewer. When the notes have been entered, click '**Save**' to record the notes. If previous notes exist, the Previous Notes field below the text box will automatically display the previous callers' notes so the interviewer can quickly read them.



Call Back tab and button

If an outcome is a 'call back', the caller may want to add detail to this outcome. The caller can access the Call Back screen either with the **'Call Back'** tab when choosing an Outcome or the **'Call Back'** button under the Favorites list. A variety of information is displayed on this screen: Previous callbacks are displayed, as well as, input fields that the caller can use to add new call back information.

You will note that there is no prospect name in the Prospect Name field. The survey may be a Random Digit Dial survey, which means that we do not have names for our respondents - only phone numbers of households. Otherwise, we will have the contact information of the respondent; therefore, the prospect name field on the callback screen is filled in. If respondents give interviewers the name of a person to call back and speak with, the interviewer can put that information in the caller notes. However, we typically do not urge the interviewers to get a name with callbacks but to simply ask, whom should I ask for when I call back? This way, a respondent can choose to give a name if they want, say something like 'the woman of the house' or decline to give a name.

Note: You may want to add the above fact to you repertoire of rebuttals to emphasize that this survey is anonymous!

The screenshot shows a web application interface for call management. The browser address bar displays the URL: <https://www.moonfreasp.com/DialVision/SetDiater.asp?uID=2C3385CC-8AB1-4C99-8B7E-6ED5A2E0F072>. The interface is divided into several sections:

- Left Sidebar:** Contains an 'Address' section with 'Phone 1: (614) 442 - 7375', a 'Favorites' list with buttons for 'Call Back', 'Last Question', 'Call History', 'Caller Notes', 'Rebuttals', 'Quick Facts', 'Outcome', 'ALDS SURVEY', 'PARTIAL', 'MAPS', and 'Manager', and a 'Last Outcome' section with 'Hang Up' and 'Done' buttons.
- Main Content Area:**
 - Top right: 'Email:' field, 'Prospect:' (2:19 PM Eastern), 'Employer:', 'Spouse Employer:', 'Dataset:' (NOAA), 'Campaign:' (ALDS), 'List:' (Sample List), and 'Resume Script:' (NOAA ALDS SCRIPT).
 - Navigation tabs: 'Outcome', 'Call Back', 'Follow Up', and 'Caller Notes'.
 - Form fields: 'Code:' (CallBack), 'Date:' (10/16/2009), 'Time:' (2:40 PM), 'Hours:', and 'Days:'.
 - Calendar: A calendar for October 2009 with the 16th highlighted.
 - Call Details: 'Current Time:' (Prospect: 2:41 PM, Agent: 2:41 PM) and 'Call Back Time:' (Prospect: 2:40 PM, Agent: 2:40 PM).
 - Buttons: 'Save' and 'Delete'.
 - Table: 'Other Call Backs, Reschedules, and Appointments Assigned to You' with columns: Prospect Name, Outcome, Prospect Time Zone, Prospect Date/Time, and Caller Date/Time.
- Bottom Navigation Bar:** Contains buttons for 'Prospect', 'History', 'Financial', 'Info', and 'Outcome'.

Call History tab and button

Another button of interest in the Favorites list is the **'Call History'** button. The Call History screen is a log of every system outcome placed on that call. It may be helpful for an interviewer to look at that screen before a call to gather past information such as whether an answering machine message has ever been left for example. The history information is updated by the system every time a call is placed. So, while an interviewer doesn't actually create a new 'row' of history information manually, once an outcome has been set the case and the next case accessed, a new row of information is automatically created.

Address

Phone 1: (614) 442 - 7375

Idle...

Calling:

Last Outcome: Recall

Hang Up Done

Favorites

Call Back Last Question

Call History Caller Notes

Rebuttals Quick Facts

Outcome ALDS SURVEY

PARTIAL MAPS

Manager

Prospect History Financial Info Outcome

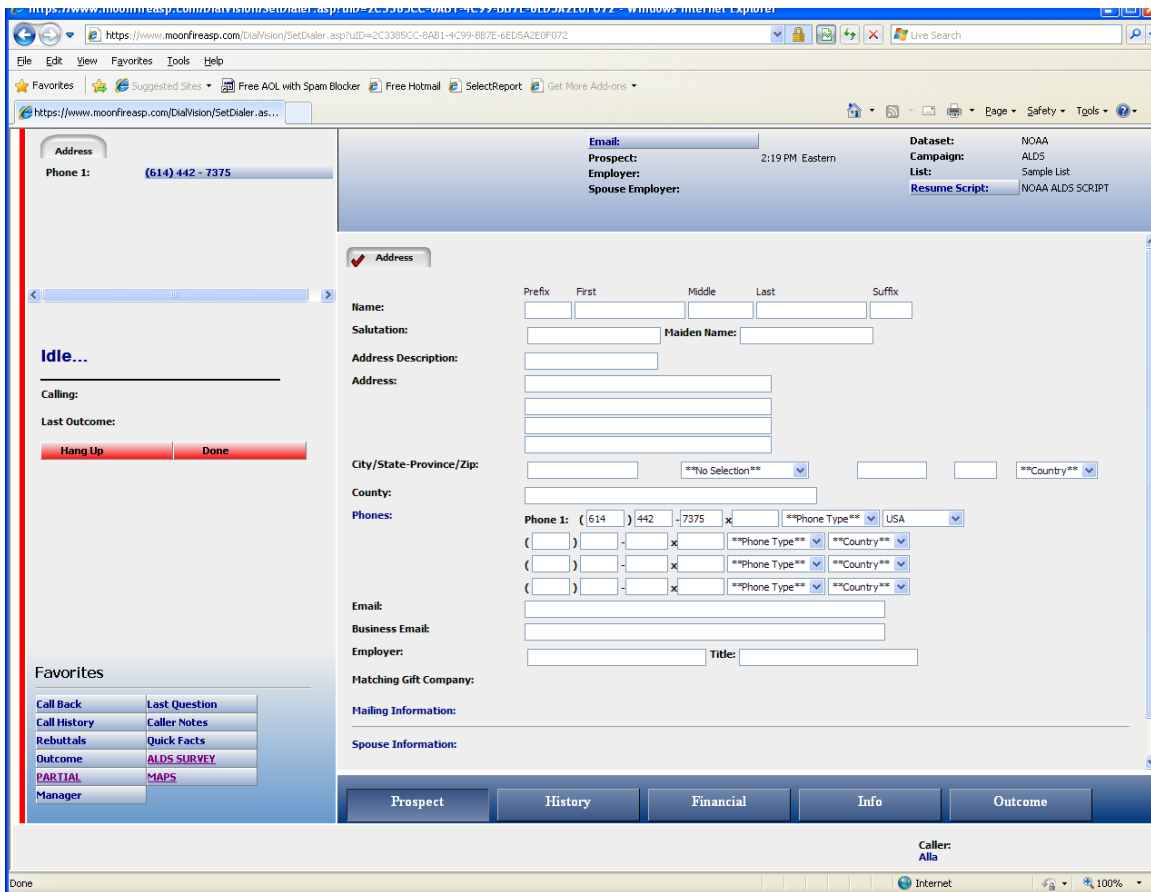
Caller: Alla

Done

Internet 100%

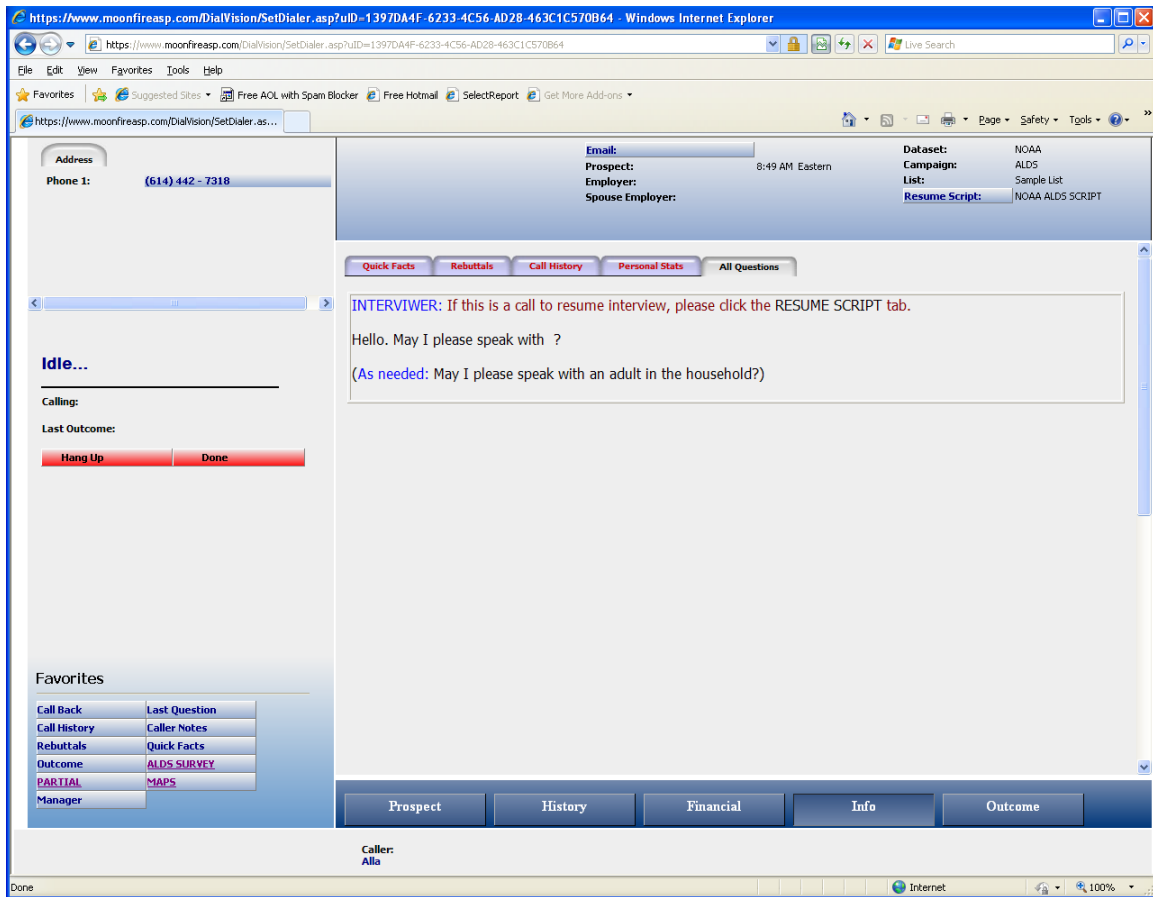
Address button

The **'Address'** button allows the caller to update demographic information for the respondent. For this campaign you will only be able to add phone numbers. When you click on this tab, you will see the information that is currently in the database as the primary location for the respondent. If it needs to be edited or information added, click in the "Phones" row that needs to be updated and type in the information. When you have finished making the changes or additions click **'Save'**.



Questions button

The script (Introduction) is preloaded into DialVision so that the interviewer can move through that script using the buttons on the right side of the introduction ('speaking to head or partner', 'not the head or partner', 'declined'). The Questions button will show all of the questions or segments of the introduction and consent that the interviewer has already asked. It thereby permits the interviewer to simply click on the segment or portion of the consent that the interviewer wants to go back to. In the event that a respondent changed his or her mind or if an interviewer discovers he or she is talking to the wrong person and needs to re-locate the script, the button displays all introductory questions and allows the interview to click on the question to go back to and relocate the dialogue.

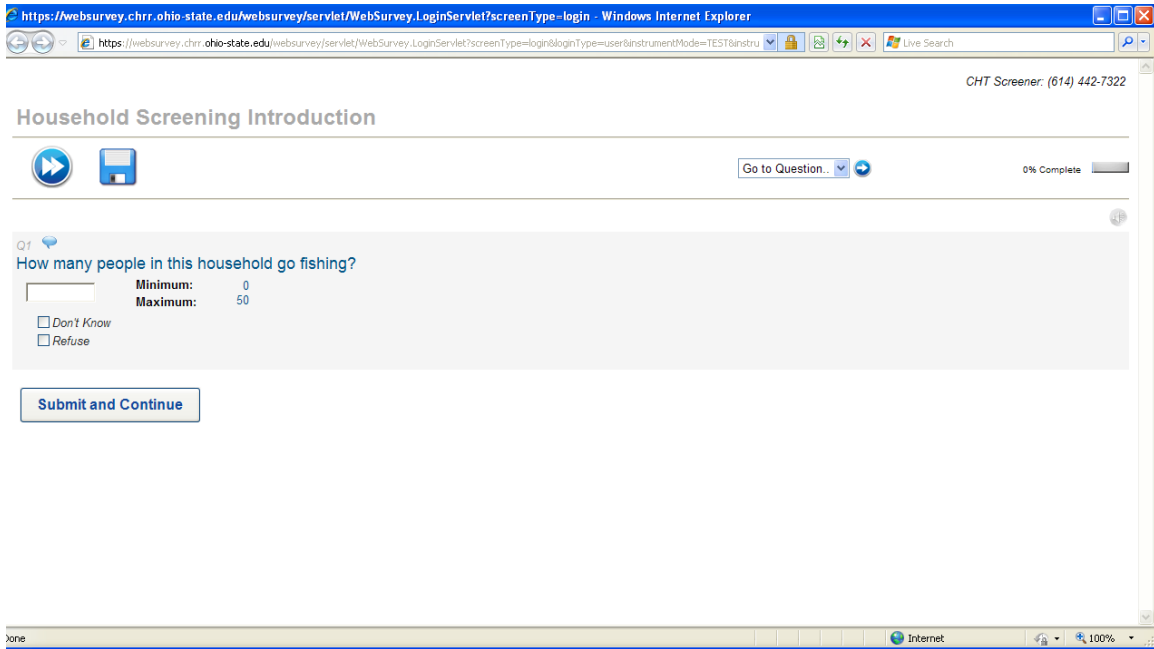


Last Question button

This button simply takes the interviewer back to the last question they asked in the script and allows them to input a new answer to that portion of the script. Repeatedly clicking this button will scroll back to succeeding previous questions. A faster way to go back to a specific question is to use the **'Questions'** button, locate the specific question and click on it.

Survey Button

The Survey button links the caller to the actual, web-based questionnaire. The caller should access the questionnaire only when the person has agreed to take the survey. Once you have dialed a number and have a respondent on the line ready to do the interview, click on the **'Survey'** button, to access to the first screen of the questionnaire. The Survey will appear in its own second window and the DialVision window will remain open in the background.



Go to: [Quiz for DialVision: Chapter 3: DialVision Functions](#)
[Chapter 4: Managing Cases in DialVision](#)