

DialVision

Chapter 4: Managing Cases in DialVision

Distribution of Cases

Cases are distributed automatically to the next available interviewer as they become available. Since the outcomes you select could change the order of the cases in the queue, it is very important that you take great care on how you select them.

Managing work time

You should talk to your Supervisor about what is expected of the time that you will spend on this study. The supervisor will let you know how many hours per day he/she expects you to be in DialVision accessing the questionnaire, updating your outcomes or contact information, and conducting interviews. Be sure to adhere to that expectation and let your supervisor know as soon as possible if you encounter any problems.

Since DialVision may have cases in the queue waiting for contact, it is important that you are ready to work cases at the time that you log on. Logging on before you are actually ready to work can hold up the process of completing interviews.

If you decide to take a break from interviewing, be sure to [log out](#) of DialVision properly. Anytime you are logged in to DialVision, you are on system time and in the queue to receive calls.

Be reminded that you will be making contact with respondents in different time zones throughout the country. The [Call Back tab](#) will let you know what time zone the respondent is in compared with your own time so be aware of this when scheduling appointments. Administrators will select an automatic shut off so that cases in time zones where it is very early or very late will not be released until a designated time.

Accessing the Questionnaire

When you have logged into DialVision and have reached a respondent, you should select the "**Survey**" tab at the bottom left hand side of your screen. Once you click on the "**Survey**" tab, you will be linked to the web version of the questionnaire and can begin the interview. It may take a few seconds for the questionnaire to appear so be patient and only click on the survey button once.

Documenting Efforts

You may need to record call notes. There is a specific "**Call Notes**" tab along the left side of your screen in DialVision. Record your note for the case in the box provided, and then click "**Save**". After you save your comment, you will see that the comment is stamped with the date, time and caller. Each time a new comment is added and saved; it will appear on the screen below and cannot be edited.

NOTE: When you are on preview mode it is important to review the latest call notes for the case before you dial. These comments are provided as a way for interviewers to communicate with each other about the status of each particular case.

Remember that if you cannot conduct an interview on your first attempt, you are encouraged to make an appointment for the case by setting a call back within the field period.

The Address tab in DialVision will provide you with the current respondent information and phone number. When we first start interviewing this information will be limited to a phone number. If you are setting a

callback or trying to send the Respondent information about the project, you are encouraged to ask for information like name and address.

Assigning Disposition / Outcome Codes

DialVision will require that you enter an outcome (disposition code) for each phone call or case you handle. This will inform other interviewers and supervisors of what has happened on a case when it comes to them. The table provided below describes the outcome and when it is to be used. We will discuss each disposition code and its use at length during training.

DISPOSITION (OUTCOME)	WHEN TO USE
NO ANSWER	Phone rings and no one answers phone.
BUSY SIGNAL	Busy signal.
OP INTERCEPT	Number has been changed (do not call new number).
DIALING ERROR	R's phone number cannot be reached as dialed.
DISCONNECTED	R's phone number is not in service.
DECEASED	R has passed on and no other angler in the HH
BUSINESS	Business phone number.
CELL PHONE	Interviewer told 'this is cell phone'. STOP! Stop interviewing even if in the middle of interview.
ANSWERING MACHINE/VOICEMAIL	Call answered by machine.
FAX MACHINE/COMPUTER	Fax dial tone or computer tone.
CALL TOLL FREE LINE	At R's request / referred to call the toll FREE hotline for more information about the project.
CALLBACK	Made appointment to call R back.
RECALL	R asks interviewer to be contacted at later time, NO specific date or time given.
INTERVIEW BREAKOFF	R Survey questionnaire not complete and no Callback date or time has been set.
REFUSAL - Reason(s)	Identify the nature/reason of R's refusal.
Definite/Final/Hostile	R sternly refused to participate (Survey not started).
Do Not Call	R sternly requested to never call again.
GKR-Gatekeeper Refusal	Call answered by other member of the HH and refused on behalf of the R. Person who answered the phone refused to allow interviewer to speak with head of household or spouse.
Soft Refusal	R refused to participate, not stern and is workable.
LANGUAGE BARRIER	The respondent does not speak ENGLISH, so a translator is required. (Reasons provided)
COMPLETE	Telephone, every section completed including locator and IW remarks.
R REQ (INFO)	R request a letter before participation (enter correct address in address screen).
DISPO NO FISHING IN HH	Within county, no one does fishing in the HH.
DISPO NO PERMANENT RESIDENCE	HH is in the right county but is a temporary residence.
DISPO WRONG COUNTY	HH contacted is outside the counties approved for sampling.
DISPO ZERO 12 MONTH ANGLER	No fishing activity in the last 12 months at the time of survey.
DISPO ZERO 2 MONTH ANGLER	No fishing activity in the last 2 months at the time of survey.
DISPO TERMINATE RESISTANT	Survey started, R decided to stop and gave final decision to not call again. (Unworkable)
PRIVACY MANAGER ON	R's phone set to restrict unidentified phone numbers.
RE-SCHEDULE	R broke off the interview and agreed to be called back to complete.

RESPONDENT NOT AVAILABLE DURING STUDY	R is not in the HH during the study, no available person to release information on behalf of R.
TOO ILL OR HEARING IMPAIRED	R is too weak to stay on a phone conversation or with hearing problem.
DISPO Business phone	During interview, R identifies the number as a business number
DISPO Terminate suspend	R refuses to continue during interview

Post shift (For the Field Interviewer)

Post shift is a term that describes the time and the process after an outcome has been set for a case. It is where the system cleans the cases and reorganizes the dial logic based on outcomes and selection criteria. It cleans up any mess for the dialing pool. For example, if a case is complete, it purges it; if a case is set to the 'cell phone' or 'business' options it sets it aside; if a case is set to CallBack, it reschedules the case to the time and date; if a case is set to 'Recall'; it puts it back in the queue; etc.

As you call respondents throughout the day, you will be setting cases to different dispositions or outcomes. This means that cases may be removed from the calling pool based on the outcomes you choose. It is, therefore, of the utmost importance that you select outcomes carefully, keeping in mind what happens to a case at the end of the day.

Moving on to the next case

After you have completed a case and/or assigned a call disposition, you should click the "**Done**" tab. You will be asked if you are finished with the current prospect. If you click "**cancel**" you will be brought back into the case. If you click "**yes**", you will be asked if you are ready to take the next case. If you are ready click "**yes**" and the next case will appear. If you click "**no**" you will be properly logged out.

Inbound Lookup

There are situations in DialVision where it will be necessary for you to manually pull up a case using Inbound Lookup you can do this by entering the 10 digit Case Identification code (CaseID). The CaseID or Host ID is the same as the respondent's telephone number.

It is important that you know the respondent's name (if available) or CaseID to search by in the inbound look up screen. At the inbound look up screen, you will enter one of these pieces of information to bring up a respondent's case. Once you activate the search you will be able to select the respondent's name or number from the list that comes up and enter the respondent's case.

Ending your Day: Logging Out

The proper way to log out of DialVision at the end of your day (or when you take a break) is to click the [Done tab](#) at the end of a case. You will be asked 'if you are finished with the current prospect'. Click "**Yes**" and then click "**No**" when asked if you are ready for the next case to appear. If you do not log out in the proper way, the system will not let you back in. At the blue [DialVision login screen](#), type "logoff" (without the quotes) in the Username field and your *username* in the Password field. If you have any trouble, contact your Supervisor who can also log you out. Just remember that you will continue to be assigned cases until you properly log out, so it is imperative that you log out properly when you have finished work!

Attention: Interviewer, you have now learned to exit a case properly by selecting an outcome for the case and log out of DialVision. There are three things you should NEVER do when logging out:

1. Never exit DialVision and a case by clicking on the 'X' button on the upper right of your screen.
2. Never click the Refresh button.
3. Never select CTRL + N on the keyboard.

If you do any of these three things while on a case, it may go into the incomplete transactions folder. If you suspect that this has happened please contact you immediate supervisor.

Go to: [Quiz for DialVision: Chapter 4: Managing Cases in DialVision](#)
[Chapter 5: Troubleshooting](#)