

CLSA CATI Software Requirements (DRAFT)

Definitions

Interview - calling a participant, putting them through a survey and recording their answers

Participant - literally, a participant (confirmed, potential, former or refused) in the study

Survey - a group of stages, organized into a logical path from start to finish

Stage - a script that is either "per call" (is used with every call to a participant for the interview) or "per interview" (used until it is completed once)

Sample - a logical collection of participants that can be assigned to a survey and site

Site - a physical call centre location - used for limiting a user's actions to a given site

Role - a logical grouping of access permissions that can be assigned to a user

Call - dialing a participant's phone number, connecting (or not), performing (or not) an interview (or part of), ending the call and recording results

Participant Status - describes the participant's involvement in the study

Consent Status - describes the participant's has consent to be part of the study (verbally and/or written)

Call Result - records if a call connected with a participant or not - and if not, why

History - records any contact with a participant or changes to the participant's information

Contact Info - a record and details of an address and/or phone number for a participant - or their alternate contact person(s)

Queue - the schedule of future calls, with associated priorities

Shift - a time window, associated with a site, that represents a period of work/making calls

Note - a brief record of details regarding a participant, call, interview or other object in the system

Help - a brief set of instructions regarding a specific function or element of the CATI system - may include a link to more detailed information

Appointment - a specific time at which a participant is expecting to be called for an interview

Assignment - when an operator is ready to make calls, the system assigns one from the queue - locking it to the operator until it is released

Participant Restriction - designates (by province, postal code, area code, etc.) that a cross section of participants will not be called until the restriction is removed

Report - a display of data/information regarding the operation/statistics/status of the CATI system

Data Export - a dump of results/answers from a give stage/survey/etc. in a designated format (csv, excel, spss, sas, r, xml, sql, etc.)

User - a CLSA (or associated organization) staff member given access to the CATI system, in some role

Operator - a role that designates a user as someone who will be calling/interviewing participants

Refusal Converter - a type of operator that will also be assigned "soft refusal" participants, in hopes of recruiting them into the study

Viewer - a user that has access to view specific reports and or data exports

NCC Clerk - a user that inputs/updates information regarding participants and their appointments

Site Supervisor - a user that monitors/manages operations and operators at a given site

NCC Admin - a user that monitors/manages operations and users of the system

Tech - a user that monitors/manages the CATI system itself

Access Permission - designates a user role's access to a given function or element of the CATI system

User Activities

All users

- log in with username/password
- have access to operations according to their role(s) and site(s)
- can change their password
- can read help
- have their updates/access to participant info tracked for audit purposes

Operator

- is assigned a single participant at any point in time
- can only view details regarding the currently assigned participant
- initiates calls to participants

- can read notes regarding participants and previous calls
- reads through scripts/surveys with participants
- records participant responses
- makes notes regarding calls and participants
- schedules appointments/callbacks
- updates participant details and contact information
- has time tracked (logged in, on/off call, on break, etc.)
- can call a participant at another available contact number
- can call back a participant if they are disconnected
- can end a call at anytime if needed (Hang Up button)
- has call results and statuses entered automatically by the application - when possible

Site Supervisor

- can create/manage shifts
- can create/manage operator and supervisor accounts
- can create/manage appointments/callbacks and shift calls in the queue
- can view reports
- can edit/update participant info
- can manage sample restrictions by area code, postal code, province, etc.
- can assign operators to specific surveys
- can update/enter participant responses outside of a call
- makes/edits notes regarding calls and participants

NCC Clerk

- can read notes regarding participants and previous calls
- makes notes regarding participants
- schedules appointments/callbacks
- updates participant details, contact information and consent data

NCC Admin

- can perform all Site Supervisor functions
- can create/manage shifts
- can create/manage accounts

- can create/manage appointments/callbacks and shift calls in the queue
- can view reports
- can edit/update participant info
- can manage sample restrictions by area code, postal code, province, etc.
- can import participants/sample
- can assign participants/sample to sites/surveys
- can assign surveys to sites

Data Viewer

- can view/download data in various formats

Report Viewer

- can view/download reports in various formats

Tech

- can perform all NCC Admin functions
- can suspend system operations
- can view technical system status reports

User Interface Mock-up

