General Westat Procedural Guide
For voxco Surveys

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About Voxco

Voxco is a flexible software package used by the TRC to program, support, and administer both CATI and web surveys.

As a Data Collector, you will use Voxco to conduct interviews.

For most projects, Voxco is used to…
- hold sample information (e.g. phone numbers and Respondent information),
- conduct the survey and store Respondent survey responses,
- deliver cases to Data Collectors for calling through its built-in scheduler, and
- store case call results.

Accessing Voxco

- Click the Launch Voxco link on the VCC Agent screen once you are logged into Five9 telephony, our current calling system. This will allow access to your survey programmed in Voxco software.
Logging into Voxco

- Enter your Voxco credentials:
  - Username: WINS number (e.g. 1591674)
  - Password: westat1 (default password; yours may be different)

- Select the project you want to work and then click Accept.
  - If you have been assigned to work a specific group of cases, enter that Group number before clicking Accept.
Working with Voxco

Voxco Screens

Most screens are divided into four sections:
1) Screen name, Navigation Pane, and Special buttons
2) Question / Instructions / Probe text
3) Response codes, Radio Buttons, and Response options
4) Next button and Answer field
Other types of Voxco screens include…

- Grid questions

![Grid questions example](image1)

- Dropdown answer choices

![Dropdown answer choices example](image2)

- Address information

![Address information example](image3)

All Voxco screens have the top section (Screen name, Navigation pane, and Special buttons), middle section (divided or undivided), and bottom section (Next button).

*Take note that the Answer field will NOT always be found in the bottom section.*
Coding Responses

- Use your mouse to click the **radio button** next to the desired response OR type the appropriate code into the **text box** at the bottom of the screen.

- Click **Next** at the bottom of the screen, or press **Enter** to move to the next screen.
Modifying Previous Responses

On occasion, you may select the wrong response or continue with the survey and find that the Respondent wants to change their response to a previous question.

The Back button within the Navigation pane should be used to navigate to a previous screen.

Instructions for Modifying a Previous Response

- Press Esc on your keyboard to illuminate or unlock the Navigation pane.  
  Note that clicking Esc here dulls or locks the rest of the screen.
- Press the Back button on the Navigation pane until you reach the previous screen requiring a change.
- Press Esc again to lock the Navigation pane, and correct the recorded answer.  
  Note that clicking Esc on the screen where you need to modify an answer will illuminate or unlock the rest of that screen.
- Press Enter or click Next at the bottom of the screen until you reach the next unanswered question.
Comments, Interrupt, and Messages

These buttons are standard Voxco buttons. Buttons are added or removed to fit individual project needs. Any changes from this standard form will be discussed in specific project trainings.

Data Comments

- Used to convey information to only the Data Manager, so he/she can modify or add an answer in the database file. 
  *During review, a Data Manager can add option choices and make coding decisions you cannot.*

- Comments are most frequently made when *none of response options match* the answer and when the system’s *hard edit check* doesn’t allow re-entry of the original answer.

- Do not leave extraneous comments. Only provide information that enables the Data Manager to enter a correct answer for a programmed question. 
  *However, comments must be explicit, not vague, containing enough details so that the Data Manager can determine an answer.*

- Never alter a comment you did not create.

- Comment Format:
  - Date and Westat assigned initials (e.g. 5/20/XX MRJ0)
  - Question name or reference to question is needed
  - Accurate answer with any needed justification or explanation of the situation

*Remember, a DATA COMMENT should only be used if you cannot code a response yourself.*
Interrupt

- Clicking the Interrupt button takes you to a menu of options available for your study. Below are common Interrupt options:
  - **Resume Interview**: allows the user to quickly resume the interview from the Interrupt screen when entered in error.
  - **Change Time Zone**: allows the user to change the time zone. *This is an important function that helps us call at appropriate times.*
  - **Mailout**: allows the user to collect the Respondent’s address so we can mail them additional information about a study.
  - **View Information Screen**: allows the user to view information about the case.
  - **Add Phone Number**: allows the user to add a phone number to the case at any place in the interview.
    
    *Currently, only 1 number can be kept active in Voxco. Adding a number will finalize the original number attached to the case.*

Message to DC

- Used to convey information about a case to other Data Collectors. The information should help the next Data Collector complete the case.
- **Message Format**:
  - Date and Westat assigned initials (e.g. 5/20/XX MRJO)
  - Brief description of pertinent information

Data Collectors are expected to read all **Messages** before dialing a case. A screen will prompt you to do this prior to the **Autodial** screen.
Setting Appointments

Setting appointments represents an important part of working cases. This section will explain the different parts of the Voxco appointment screen and how to code a Call Back.

Understanding the Appointment Screen

1. **Confirm Time Zone** – This lists the Respondent’s local time zone. Make sure to confirm the time zone with the respondent if it appears on this screen.
   - Voxco converts all Call Back times to the Respondent’s local time zone. This means that if a Respondent tells you they want to be called back at 12pm, you can record 12pm without worrying if they are in the same time zone as you.

2. **Time Conversion Chart** – Time must be reported in 24:00 format (military time). Use this chart to help you convert the standard 12:00 format to 24:00.
   - Examples: 5pm → 17:00; 5:30pm → 17:30; 1pm → 13:00; 1:45pm → 13:45

3. **Hours of Operation** – The project’s standard hours of operation.

4. **Last Date to Interview** – For projects with a finite calling window, the last date we will call to conduct an interview will be listed here.

5. **Holidays** – This area will display any times and days that a project is not working due to a holiday.

6. **Calendar** – Use this window to select the time and date of the Call Back.
   - ALWAYS select the **Time** before you select the **Date**. If you forget to set the time, the scheduler will not deliver it appropriately.

7. **Calendar Icon** – Use this icon to bring up the Calendar.
How to Set an Appointment

1. Click the Calendar Icon. *(reference number 7 above)*
2. Select the appointment **Time**; then select the appointment **Date**. *(reference number 6 above)*
3. Check the **Answer field** to the right of the **Next** button to verify the information was entered correctly.
4. Click **Next**.

*Note that you should input whatever time the Respondent tells you. Voxco will automatically set the correct time according to the Respondent’s local time zone.*

Understanding the Appointment Type

The way in which Data Collectors (DC’s) set appointments in Voxco is the same for both **General / Not Firm** appointments and **Firm** appointments. The difference between the two appointment types occurs behind the scenes. **Firm** appointments have a higher priority and will, therefore, be delivered to DCs before a **General** appointment of the same time.
Going on Break

Break specifics will be discussed in individual project trainings. Below are the general guidelines for taking breaks in Voxco.

- Less than 10 minutes – No action required
- More than 10 minutes – Make sure you are not in a case (your screen should look like the screenshot below). Then, click the Close session button to log out of Voxco.

It is important to log out of Voxco if you are going to be on break for more than the timeout period (standardly set to 10 minutes). If Voxco times out, it will create a ghost connection which may prevent you from working one or more shifts without pay.

Go to Result Screen

You should never exit a case without providing a result code unless the case has been finalized by the system (e.g. Complete, Ineligible, Answering Machine, Maximum Calls, etc.). Below are the two methods for reaching the result code screen:

- Select the Go To Result option on your current screen.  
  Note that this is not an option on every screen. If not, see method 2 below.
- Activate the Navigation pane by pressing Esc. Then click the Quit button and follow the on-screen prompts.
Logging Out of Voxco

It is very important that you log out of Voxco correctly. Incorrectly exiting Voxco may result in a **ghost** connection. **Ghost** connections are not easy to resolve and may prevent you from working one or more shifts without pay.

- From the **New Call** screen, click **Close Session**

- Then, click the **X** to close the browser