Web Survey Creator

Mixed Mode Surveys

Table of Contents

MIXED MODE SURVEYS 4
WELCOME TO CATI! 5
SETTING UP YOUR CATI PROCESS – THE BASICS 6
Overview of Key Aspects of CATI Survey Setup 7
CATI RESPONDENTS 10
Types of Respondent Data 10
Importing Respondent Data – An Example 11
CHANGING SYSTEM-WIDE CATI SETTINGS 17
Accessing CATI Distribution Settings from My CATI 17
Setting up CATI Users 20
Setting User Filters 23
Setting Time Zone Rules 26
Setting up CATI Stations 27
Setting up CATI Statuses 28
SETTING UP INTERVIEWER SCREEN VIEWING 32
..... 33
Installing Screen Viewer Software on a Workstation 34
Setting up a Workstation for Screen Viewing 38
Viewing a Workstation through WSC 39
THE CATI INTERVIEWER MODULE 41
Key Features of the Interviewer Module 41
THE MIXED-MODE WORKFLOW 49
A Basic CATI Workflow 50
Making an Appointment 52
Sending a Link to a Survey via Email 56
HOW DOES CATI FIND THE "NEXT CONTACT"? 57
Getting the pool of "Valid" Respondents to Call 58
Ordering the pool of "Valid" Respondents 60
MIXED MODE APPENDIX: LISTING OF TIME ZONE CODES 61

Mixed Mode Surveys

Computer-assisted telephone interviewing (CATI) existed long before the rise of Web-based surveys (CAWI). Even as the use of Web surveys has risen rapidly, it has become clear that the future of interviewing would be a mix of CATI and CAWI - often referred to as "mixed mode".

Web Survey Creator has a CATI module that adds CATI capabilities to be used for CATI-only jobs, or in association with Web-based surveys ("mixed mode" jobs).

Welcome to CATI!

Web Survey Creator with CATI has been developed to directly target what we perceive to be the key challenges facing companies engaged in CATI:

- Continued use of aging technology to perform CATI
- Paying expensive software licensing & maintaining expensive infrastructure
- Lack of flexibility - software is tied to the desktop in the office linked to an internal server

Gone are the days when a CATI business could be run efficiently with office-bound computers running desktop software. Web Survey Creator supports modern Web standards, and can be used from any Web browser - either in your office, or from a remote location. You can expand or contract your team at a moment's notice.

Our hosted version of Web Survey Creator takes care of everything for you - Managers, Team Leaders and Interviewers can simply log in from a Web browser. This is great for small to medium firms who want to be freed from the management of their CATI software and hardware infrastructure.

Larger organizations who are used to having more control over their infrastructure, and would like to self-host Web Survey Creator, can do so using our On-Premise version. Features of this version include:

- Unlimited CATI Interviewers, Team Leaders & Managers
- Unlimited Interviews & Web Surveys
- Custom Domains
- Dedicated Server & Database

How you run your CATI operation is up to you:

- Run everything in your office in a traditional CATI call center
- Run a mixture of office and off-site interviewers
- Completely decentralize - our CATI management tools ensure you still have your "finger on the pulse" of your CATI processes without the office overheads

In this chapter we will look at how the WSC CATI module can be set up to be used on its own, or as part of a mixed mode survey process.

Setting up your CATI Process – The Basics

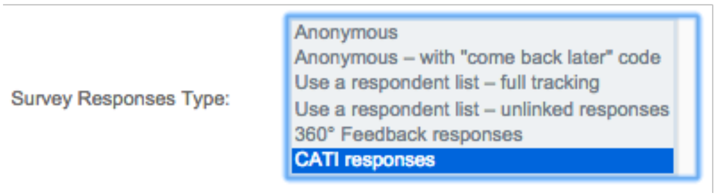
Setting up a CATI process in WSC is very straightforward and will be very familiar to users who have already created Web surveys in the product. It is beneficial to understand the similarities and differences between CATI jobs and Web Survey jobs.

Similarities	Differences
The same survey design is used for both	CATI jobs MUST have respondents, and they must at a minimum have a telephone number.
The general logic and flow is the same – flow control, data piping, scripting etc.	A custom introduction is read out prior to conducting the survey. This is never seen in the Web version of the survey.
Quotas are set up once, and work in the same way for both Web and CATI survey responses.	"Interviewers" are a specific type of user who have access to the CATI module only.

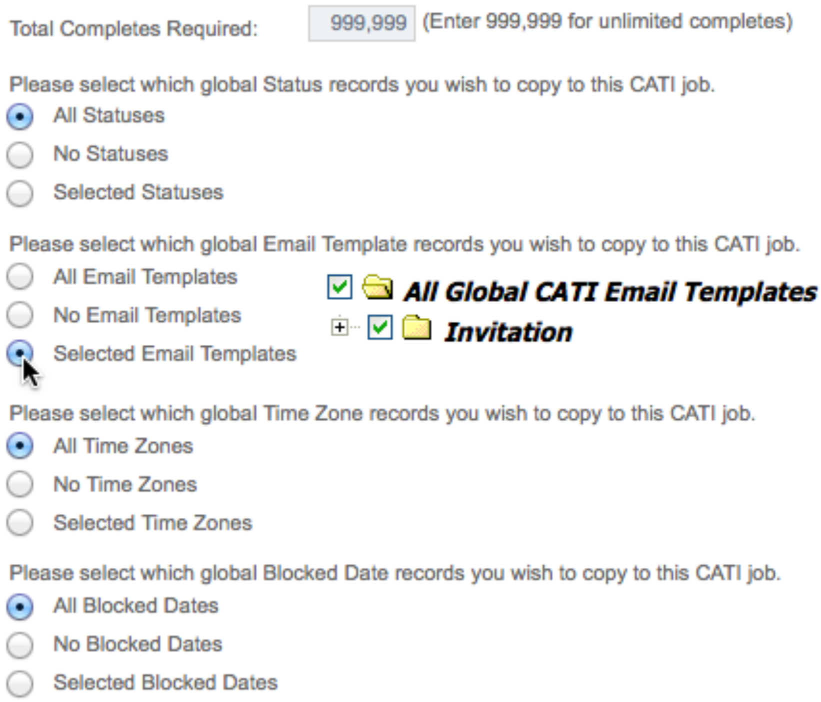
Overview of Key Aspects of CATI Survey Setup

The key steps for setting up a CATI process in Web Survey Creator are as follows:

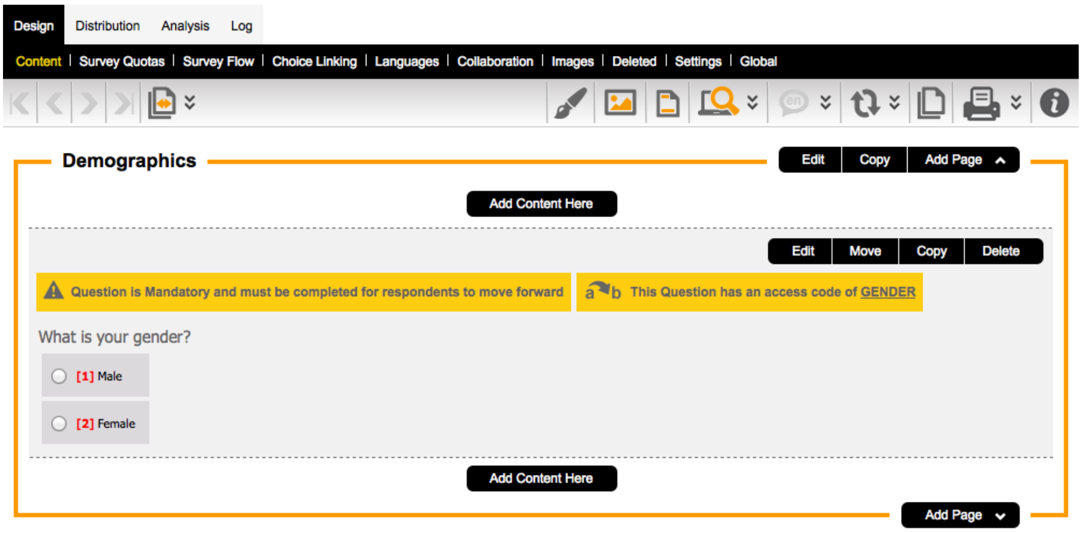
1. Create a new survey, and set the survey responses type to "CATI Responses"



2. Choose which of the global settings for Call statuses, Email templates and Time zones to copy into the new survey.



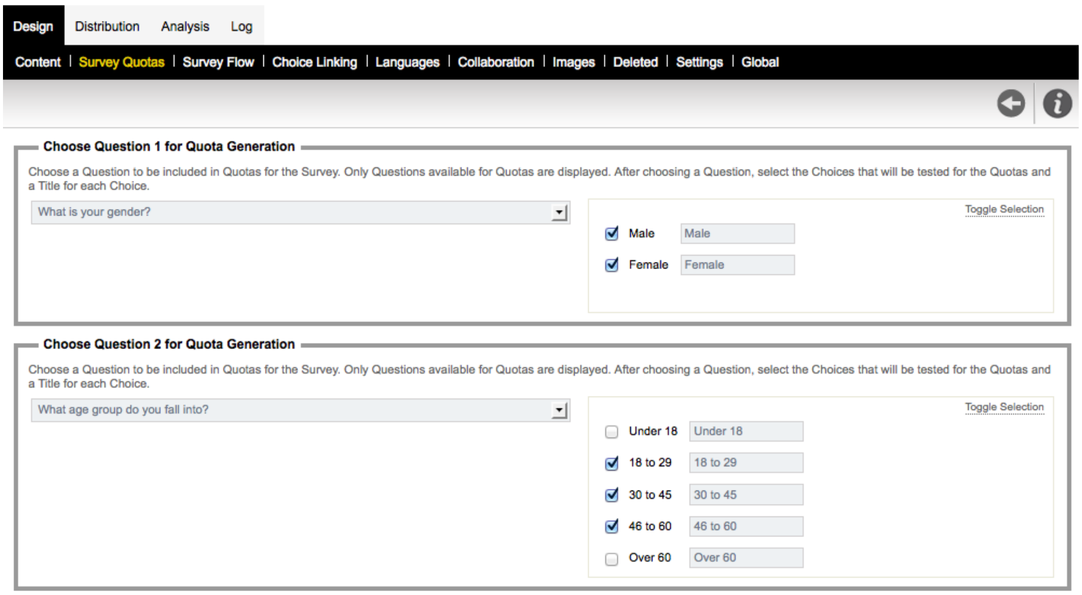
3. Create the survey content (this content will be used for both the CATI and the CAWI surveys)



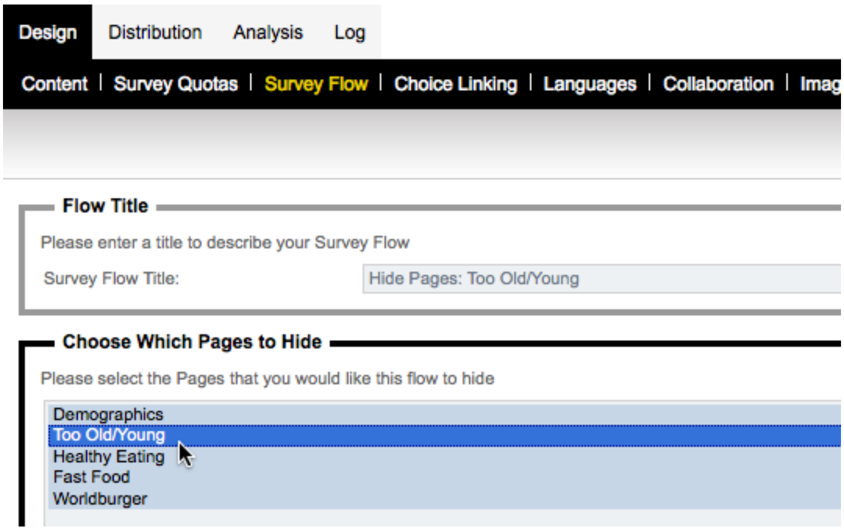
When creating survey content, consider details that are important for a properly constructed CATI survey:

1. Use codes on questions that you want to import data into (for example, if you have gender data in the respondent import data, ensure the gender question has a code so that imported data will be connected to that question)
2. Set up CATI specific content using <cationly> and <catinever> tags in survey content.

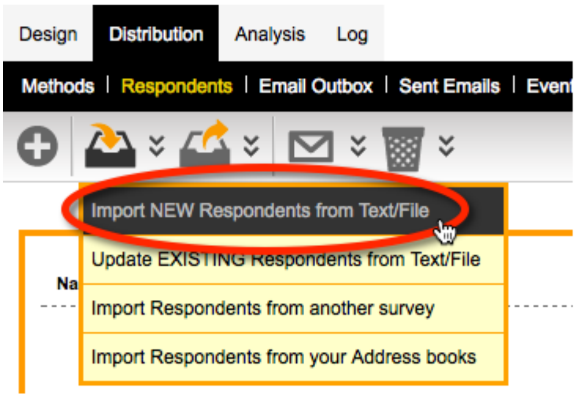
4. Set up the Survey Quotas. CATI and CAWI will share these quotas. For CATI quotas are very important, because calls will be served up based upon how full quotas are (the more empty the quota, the more likely someone who meets that quota will be chosen as the next person to call)



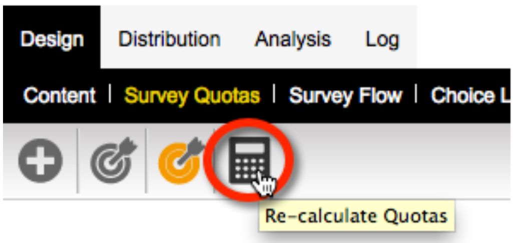
5. Set up survey flows, including flows for terminate pages



6. Import respondents that will be called as part of the CATI process



7. If the additional import detail includes data that is used in quotas, you can pre-calculate quotas for all your respondents.



Once these details have been set up, this CATI project is ready to use. A well set up project with good respondent data will have quotas and respondent tags (with non-survey data that may be of use to you) all attached to respondents. For example, a respondent could look something like the following:

CATI Respondents

Much of the setup that CATI needs has already been discussed in this manual, since CATI surveys are set up exactly the same as Web Surveys. In particular survey design, terminate pages, quotas and survey flow work in exactly the same way for both types of data collection.

Respondents are a little different. Respondents can be used for both CATI and CAWI so again there are many similarities to what we already know for Web Surveys. To get the full benefit of respondents in CATI, however, it is worth looking at "best practices" when setting up and using respondents.

Types of Respondent Data

The key types of respondent data used in a CATI project are as follows:

Telephone number	A single telephone number is the minimal amount of information needed for CATI. Without a telephone number, a call can't be made. The respondent system supports up to 2 telephone numbers, referred to as "phone1" and "phone2" in the import.
Name (incl. Title)	Name is good to have to identify respondents. Would only be excluded if you are calling a series of numbers with no idea who they belong to. Title would normally be blank, but for certain respondents – like doctors – title would be important.
Email Address	While not needed if you intend to call all respondents, "mixed mode" surveys require an Email address so that respondents can be Emailed a link to the survey for completion.
Time zone	If all respondents are in the same time zone as the interviewers, this is not needed (respondent time zones will be defaulted to the user's time zone as part of the import if it is not in the import data). Time zones on respondents are used for appointment times and other time-based rules (like when respondents may be called). Time zones are entered as codes, for example: AU-NSW AU-QLD AU-WA
Language	Usually there is a single language spoken by both the interviewers and the respondents, and therefore language is unnecessary. If multiple languages are being used however, a code for the language spoken by the respondent can be entered. Examples of language codes are: en jp
SMSID	This is a sample management ID. It is provided for people who what to add respondents with an ID that is used by an external system. Generally not needed to be used.
Survey Data	An example of this would be answering a question in the survey about gender by importing the data for each respondent. **Importing data that is relevant for quotas makes it possible for the system to more efficiently serve up the most appropriate respondents to call based on current quota completion levels. Respondents can also be filtered based upon quotas in the CATI system.**

<table>
<tr>
<td>Respondent Tags</td>
<td>Data that you want to track on a respondent, but is not related to a survey question, can be stored in respondent tags. Respondent tags have the format TAG: VALUE. Examples of respondent tags are:

PROFESSION: White-Collar
INCOME: $30,000-$49,999

Respondents can be filtered based upon tags, and tags are shown directly on respondents in the CATI system:


</td>
</tr>
</table>

Every respondent needs to include one or more of the following (ie. they can't all be blank) - Email address, Phone 1 or SMSID.

All respondents must be able to be uniquely identified in the system. This identification is based on a combination of Email address, Phone 1 or SMSID, together with the respondent's name.

Therefore, the same phone number can appear more than once, as long as there is something else that uniquely identifies the respondents that have the duplicate phone number. For example, you could import Joe Bloggs and Mary Bloggs, both of whom share their home phone number.

Importing Respondent Data – An Example

The process to import respondents into WSC is very straightforward *if* you set up your data correctly. An example of such data is shown in the spreadsheet below.

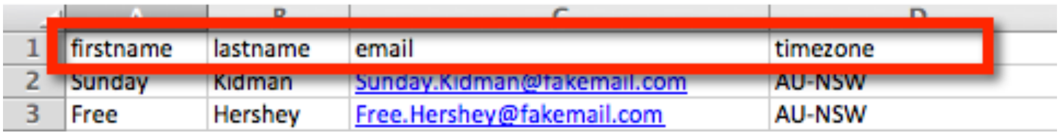
	A	B	C	D	E	F	G	H	I	J
1	firstname	lastname	email	timezone	language	phone1	AGE	GENDER	PROFESSION	INCOME
2	Sunday	Kidman	Sunday.Kidman@fakemail.com	AU-NSW	en	+61234981463	4	2	White-Collar	$100,000 and over
3	Free	Hershey	Free.Hershey@fakemail.com	AU-NSW	en	+61234998617	1	1	White-Collar	$100,000 and over
4	Greed	McGrew	Greed.McGrew@fakemail.com	AU-NSW	en	+61234922591	4	2	White-Collar	$100,000 and over
5	Moxie	Jillette	Moxie.Jillette@fakemail.com	AU-QLD	en	+61754913237	4	2	White-Collar	$100,000 and over
6	Sparrow	Madden	Sparrow.Madden@fakemail.com	AU-WA	en	+61842350431	1	2	White-Collar	$100,000 and over
7	Leper	Priest	Leper.Priest@fakemail.com	AU-WA	en	+61842353039	4	1	White-Collar	$100,000 and over
8	Mustard M.	Mustard	Mustard M..Mustard@fakemail.com	AU-WA	en	+61865060966	4	1	White-Collar	$100,000 and over
9	Seraphina	Affleck	Seraphina.Affleck@fakemail.com	AU-NSW	en	+61285588714	5	2	White-Collar	$30,000-$49,999
10	Apple	Paltrow	Apple.Paltrow@fakemail.com	AU-NSW	en	+61285519818	3	2	White-Collar	$30,000-$49,999
11	Destry	Spielberg	Destry.Spielberg@fakemail.com	AU-NSW	en	+61234930510	1	2	White-Collar	$30,000-$49,999
12	Audio	Sossamon	Audio.Sossamon@fakemail.com	AU-NSW	en	+61282978312	3	2	White-Collar	$30,000-$49,999

RespondentList.csv

Normal View | Ready | Sum=0

Using Valid Heading Labels

This spreadsheet has valid heading labels in the first row. The first row **MUST** be used for headings – the import uses these headings to determine what data is included in the import.



Columns can be set up in any order, as long as they are properly labeled, and as long as either **email** or **phone1** fields are included (for CATI projects, **phone1** is mandatory). Valid standard labels are:

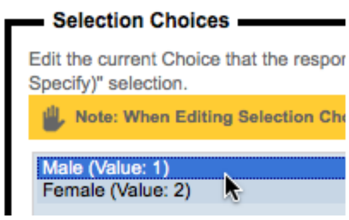
- Email
- title
- firstname
- lastname
- language
- phone1
- phone2
- timezone
- smsid

In addition to these standard labels, additional labels can be added for survey data and respondent tags.

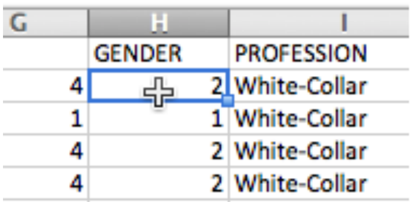
To add survey data:

1. Set up a question in the survey with a question access code

2. If the question is a choice question, ensure choices have values attached

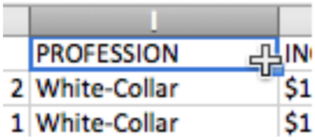


3. In the import file, use the Access Code for the column heading, and place the data in the column

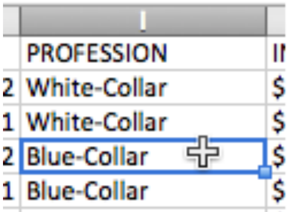


To add a respondent tag:

1. Use a heading in the import file that is NOT the same as any Access Code. This will become the respondent tag code.



2. Enter items in the column that represent the values for the tag – note that all data entered will be stored in the system simply as a text field.



Preparing the data for Import

Data can be imported in one of two formats:

1. Comma delimited text (useful when you have a basic text file with your respondent details in it)
2. As an Excel file (the most common method, since most lists of people are already in this format)

Importing Respondents from a Text File

If we had our example data in a text format, it would look as follows:

```
firstname,lastname,email,timezone,language,phone1,AGE,GENDER,PROFESSION,INCOME
Sunday,Kidman,Sunday.Kidman@fakemail.com,AU-NSW,en,+61234949503,4,2,White-Collar,"$100,000 and over"
Free,Hershey,Free.Hershey@fakemail.com,AU-NSW,en,+61234913444,1,1,White-Collar,"$100,000 and over"
```

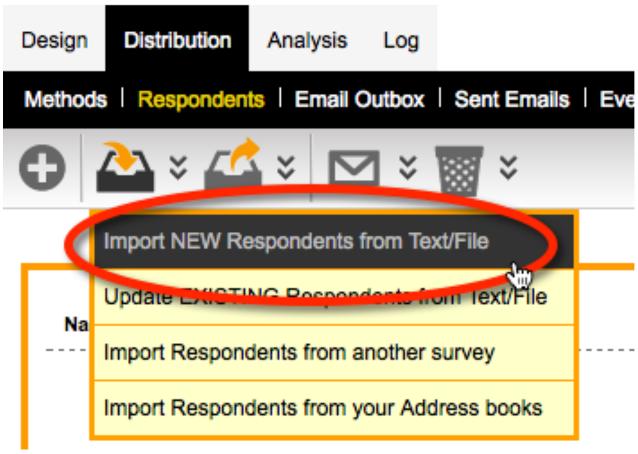
Important Tip

Commas are used for separating values, so if you have actual data that includes a comma – like **100,000 and over** – the data needs to be placed on quotation marks to ensure it is imported correctly (i.e. "100,000 and over").

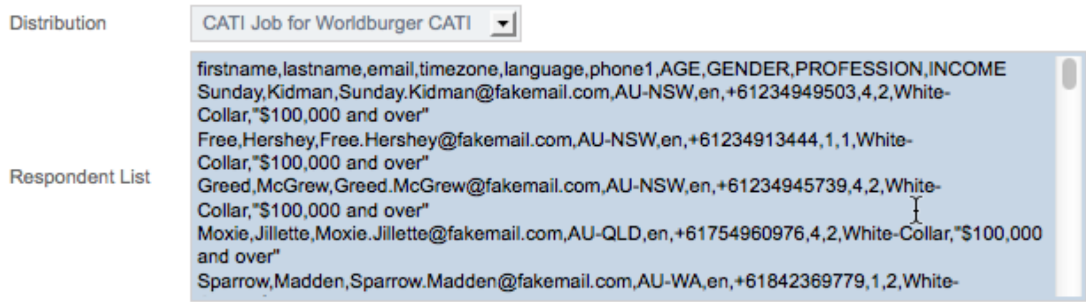
To import respondents from a text file into Web Survey Creator:

1. Select **Respondents** from the **Distribution tab**

2. Choose **Import NEW Respondents from Text/File** from the **Import Respondents** toolbar



3. Paste in the text data



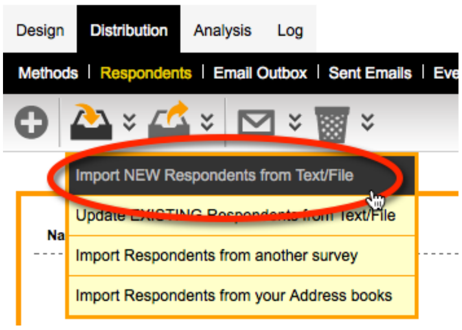
4. Press the **Import Respondents** button to import the respondents

<u>Importing Respondents from an Excel File</u>

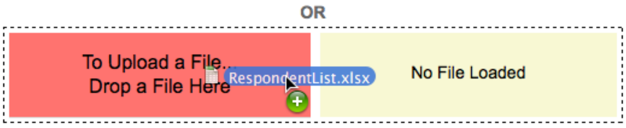
To import respondents from a text file into Web Survey Creator:

1. Select **Respondents** from the **Distribution tab**

2. Choose **Import NEW Respondents from Text/File** from the **Import Respondents** toolbar



3. Drag the file onto the upload control

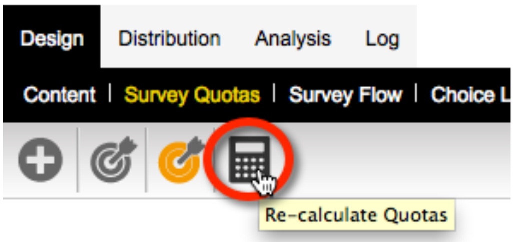


4. Press the **Import Respondents** button to import the respondents

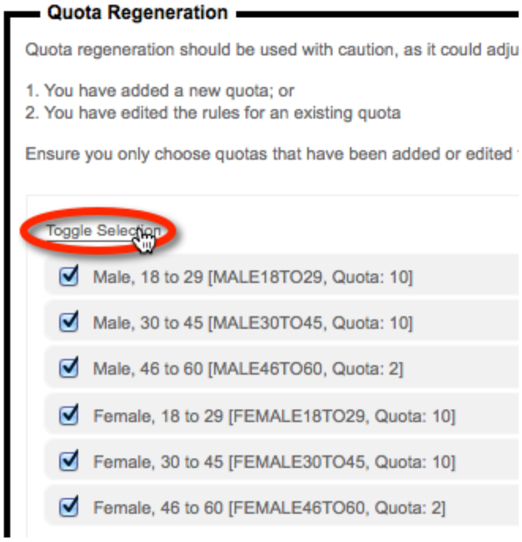
<u>**Calculating Quotas**</u>

If survey data is imported, and that data is used in quotas, the quotas need to be recalculated to update them for the new data:

1. Choose the **Recalculate Quotas** toolbar button under **Survey Quotas**

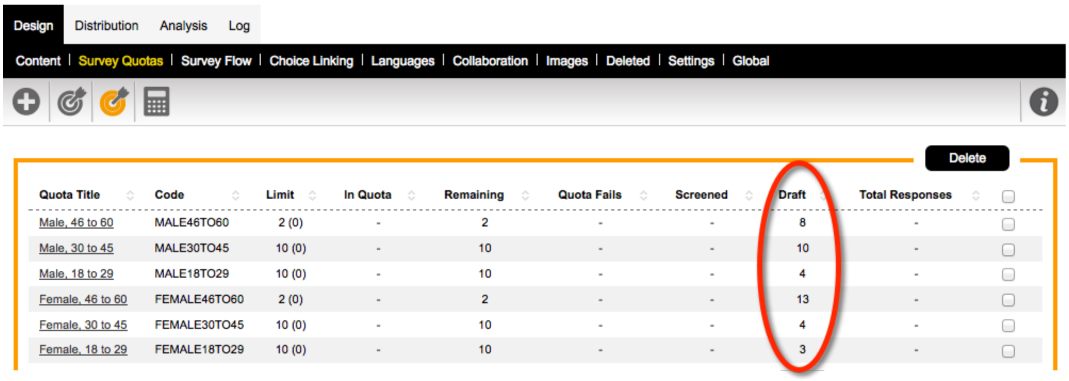


2. Click **Toggle Selection** to choose all quotas to process



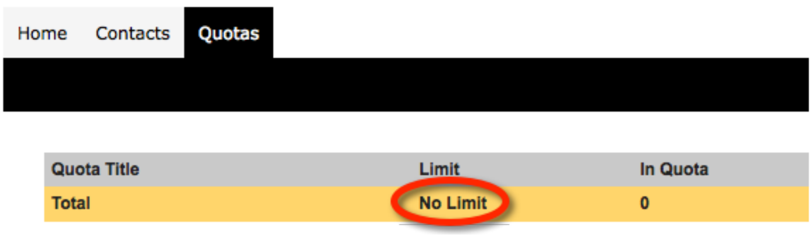
3. Click **Re-calculate Quotas** button to recalculate the quotas.

4. Looking at the "Draft" responses that appear under the quotas after recalculation is complete can show what the results of the quota calculations were. Here we see that there appear to be 4 Females that are 18 to 29 available for us to call:



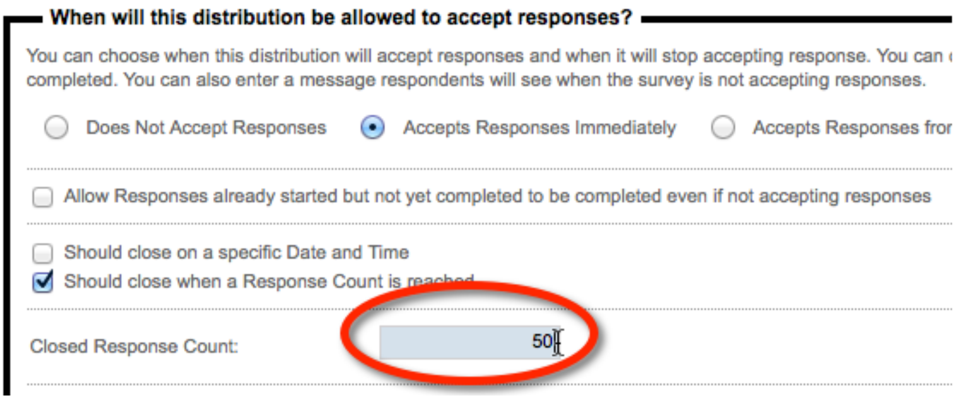
Quota Title	Code	Limit	In Quota	Remaining	Quota Fails	Screened	Draft	Total Responses
Male, 46 to 60	MALE46TO60	2 (0)	-	2	-	-	8	-
Male, 30 to 45	MALE30TO45	10 (0)	-	10	-	-	10	-
Male, 18 to 29	MALE18TO29	10 (0)	-	10	-	-	4	-
Female, 46 to 60	FEMALE46TO60	2 (0)	-	2	-	-	13	-
Female, 30 to 45	FEMALE30TO45	10 (0)	-	10	-	-	4	-
Female, 18 to 29	FEMALE18TO29	10 (0)	-	10	-	-	3	-

5. The "overall total" of respondents that need to be found for the CATI survey is set when a new CATI job is set up. This number will be shown in the Quota statistics for the job in the CATI module.



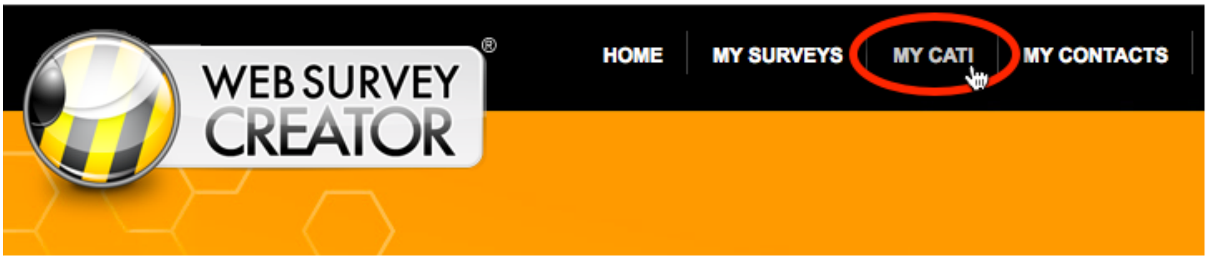
Quota Title	Limit	In Quota
Total	No Limit	0

If this number needs to be changed after the survey has been created (for example, after quotas have been added or changed), we need to edit the CATI distribution directly, and enter a **Close Response Count**. While this is not a mandatory step during the creation of quotas, it is something that may need to be changed from time to time.



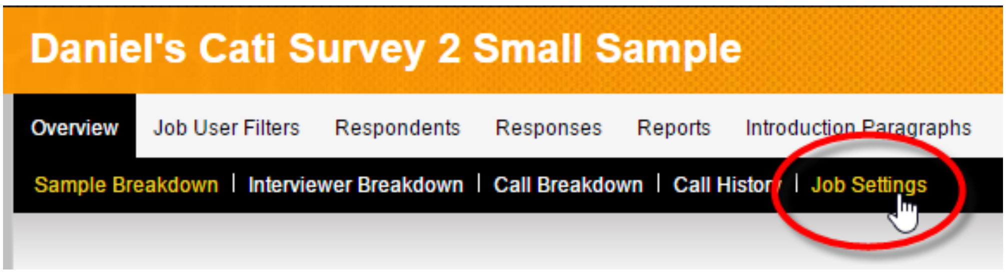
Changing System-wide CATI Settings

The CATI system in Web Survey Creator can be used "out-of-the-box" without having to worry about basic settings. There are, however, a number of settings that can be changed at a system-wide level for CATI if needed. All these changes can be performed by CATI administrators from the **My CATI** top menu (which is visible only to CATI Administrators).



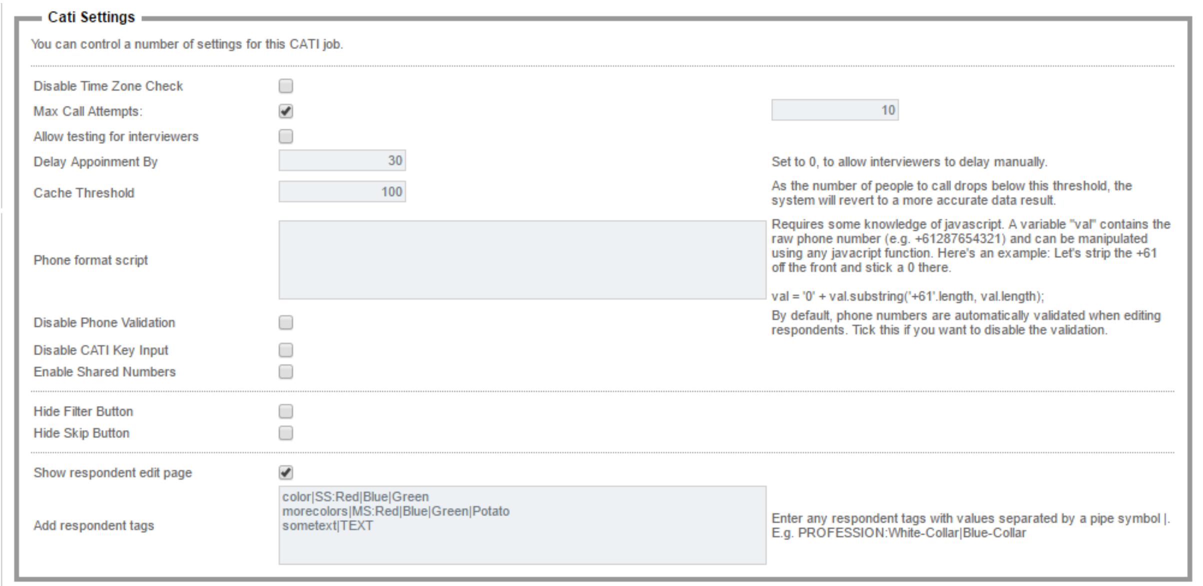
Accessing CATI Distribution Settings from My CATI

There are a number of distribution settings specific to CATI, which can only be accessed via the distribution settings. To make this easier, there is now a link from the Overview tab of a CATI job that takes you straight there and back.



Disable Time Zone Check – when ticked, this means that respondents that are imported will immediately be available to call. Note, while this might be convenient when managed correctly, it does void any timezone rules you have in place.

Max Call Attempts – This is the maximum allowed call attempts for an individual respondent that can be done over the life of the job. Once this limit has been reached, the respondent will be marked as Limit Reached and no more calls can be made.



Allow testing for interviewers – enables testing mode which creates real data that effects stats, but are marked as tests so they can be filtered out and deleted easily. Mainly for training for a new survey or something.

Delay Appointment By – default is 30 minutes, applied when interviewer presses “delay” on an existing appointment.

Disable phone validation – this will turn off the in-house validation that is applied to phone numbers so you won’t need country codes or area codes. Applies at the import level as well as adding contacts individually.

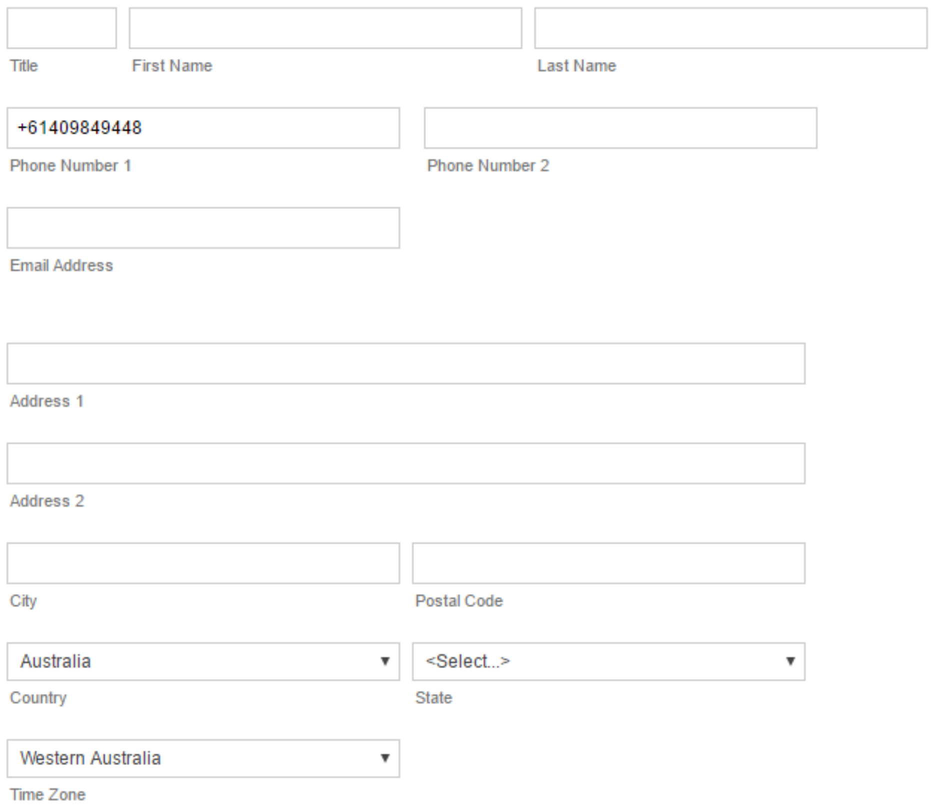
Disable CATI Key Input – this will turn off the key input so that TAB won’t go next, and you can’t press numbers to answer questions.

Enable Shared Numbers – where the same number is used for multiple contacts, links will be made available within each contact to access the other contacts.

Hide Filter/Skip buttons – removes the functionality from the interviewer role.

Show Respondent edit page – Alternative to the contact view – the edit page allows the interviewer to update the contacts details without bringing up a dialog. The details are saved when leaving this screen, either by closing contact or by starting survey.

The respondent edit page:



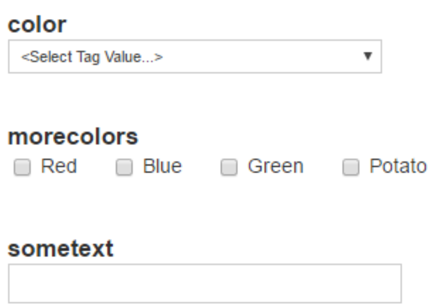
Add respondent tags – Add any respondent tags you want interviewers to be able to update when using the above respondent edit page feature. Tags are displayed as single choice, multiple choice and text based. The format is as follows:

TAGNAME|SS:value1|value2|value3

TAGNAME |MS:value1|value2|value3

TAGNAME |TEXT

Where TAGNAME is the name of the tag. Note for text, it does not need any values.

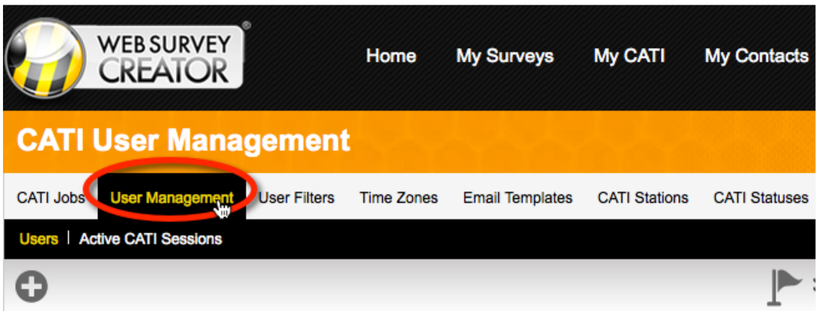


Setting up CATI Users

There are two distinct types of user access in Web Survey Creator:

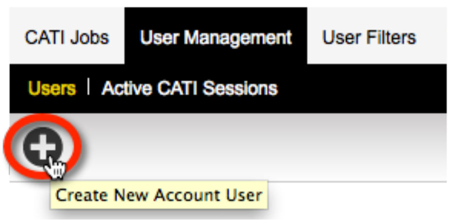
Content Designers & Managers	Anyone who has access to the main Web Survey Creator application falls into this category. This refers to all access *other* than CATI related access in the system. Some of the key work performed by content designers includes: • Create survey content • Setup survey rules (flows, data piping etc.) • Create distributions • Create respondent lists • Distribute Web Surveys
CATI Administrators & Interviewers	Anyone who has anything to do with the CATI process falls into this category. Work performed by these people includes: • Management of CATI settings through the MY CATI menu • Access to the CATI Web application • Interviewing through the CATI Web application • Management of interviewers in the CATI Web application

The exact access an individual would have within these two categories is set on their user record. The creating and editing of user records can be performed from the **User Management** tab under the **MY CATI** menu.



Adding a User

A user can be added by pressing the **New User** toolbar button.

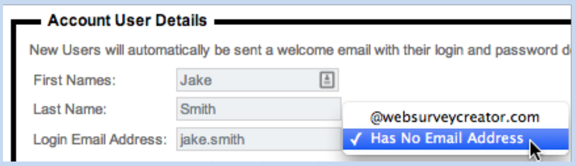


The user details that can be entered are as follows:

Name & Email	Basic user details that identify them. The Email address will be used as the user login.
User Role	Defines the level of access a user has to both the WSC main application (for survey design etc.) and to the CATI Web application (for interviewing respondents etc.)
Time zone	Knowing the time zone of the users is important when CATI is being used, because key information like when an appointment to call back a person should be made must consider the time zones of both the caller (ie. the user) and the respondent.

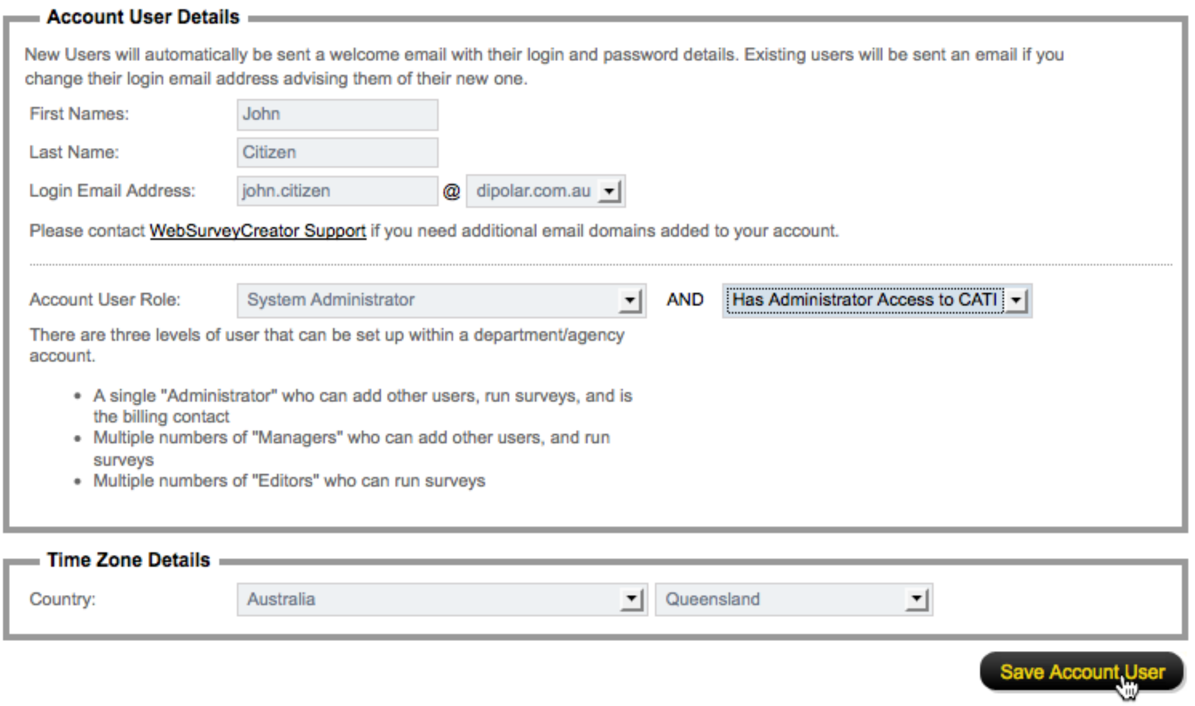
What if a user does not have an Email address?

As a general rule, all users need an Email address. There is one circumstance, however when an Email address is not available or needed – for casual or transient CATI staff that need to be able to log into the CATI system, but they have no company or other Email address. For these people, there is a "Has No Email Address" option when setting them up.



These people can <u>only</u> be given a CATI role (i.e. Their content role is set to "No Survey Access"), and log in with their user name (e.g. "jake.smith") rather than a full Email address.

The **User Add** window looks as follows:



The levels available for the user roles are as follows:

Content Role	CATI Role
<Choose Account User Role...> System Administrator Manager (can edit surveys and manage users) Editor (can edit surveys) No Survey Access	Has No CATI Access Has Administrator Access to CATI Is CATI Team Leader Is Senior CATI Interviewer Is CATI Interviewer

Any mixture of roles can be chosen for a particular user. Examples of roles that could be set up are:

For an Administrator	**System Administrator** and **Has Administrator Access to CATI**
For a CATI Interviewer	**No Survey Access** and **Is CATI Interviewer**
For a Web Survey Designer	**Editor** and **Has No CATI Access**

What is the difference between a CATI Interviewer and a Senior CATI Interviewer?

While most of the access levels are self-explanatory – separating management of the system, from using the system – these two levels are not quite so obvious. A CATI Interviewer is the lowest form of access for CATI. These people can do little more than request the next person to call for a particular CATI Job. They cannot browse contacts. By default they cannot filter contacts either.

Senior Interviewers are given more flexibility. This means that in addition to just getting the next contact, they can see a browse of prospective contacts, use filters, and choose anyone from that list to call.

Setting User Filters

The filtering system within WSC's CATI module is very powerful. It allows an interviewer to restrict who will be served up when the **Next Contact** button is pressed, and who will be shown in the browse of contacts to call under the **Contacts** tab. A filter can be based upon respondent tags, quotas and time zones. An example of a filter is as follows:

Some of the most common frequently asked questions about filters are as follows:

1. *How can I restrict an interviewer so that they will always use a particular filter (e.g. they <u>must</u> call women who are 18-29)?*
2. *Basic interviewers have no access to filtering by default. Is it possible to give them access to a limited number of filters?*
3. *Is there a quick way to customize what filters interviewers can see for a job en masse?*

The answers to all these questions can be found in WSC's User Filter system. This system allows you to set filter access on interviewers of all types on a job-by-job basis.

<u>Allowing Respondent Tags to be used in Filters</u>

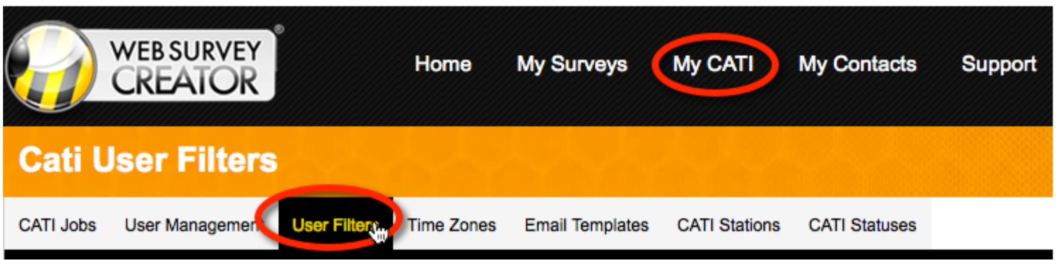
Respondent tags are generally used for two purposes:

1. To categorize a respondent in some way – for example, whether a respondent's profession is "White Collar" or "Blue Collar"
2. To store a piece of specific information on a person – like their address

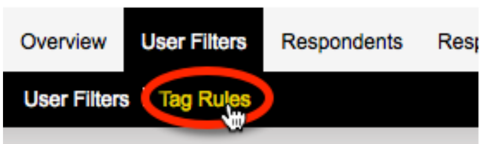
The first type of tag is something you would like to be able to filter on, since we may want to work with different categories of respondent. The second type of tag, however, would be useless in a filter, since every respondent would have a different value – for 1000 respondents, you would have 1000 addresses to choose from for the filter. This clearly would not make sense.

To distinguish which tags you want to be able to filter on, you have to add these tags into the "Tag Rules" as follows:

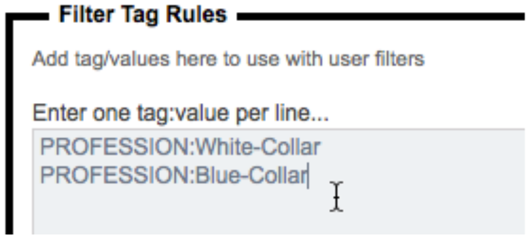
1. Choose the **User Filters** tab from under **MY CATI**



2. Click the **Tag Rules** submenu



3. Enter each tag and value



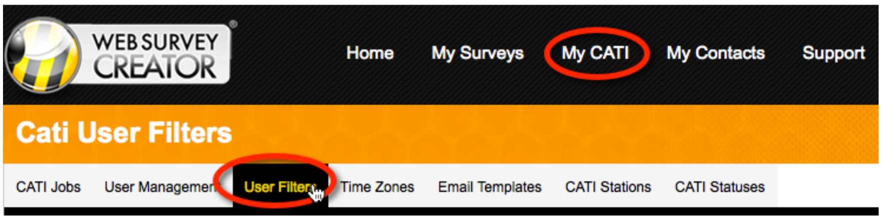
4. Press the **Update Tag Rules** button

Once tag rules have been set up, they can be used when creating user filters.

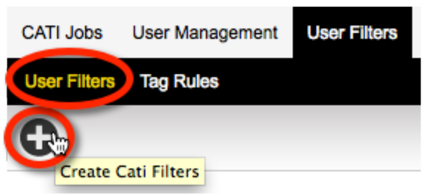
Creating User Filters

The steps to setting up user filters are as follows:

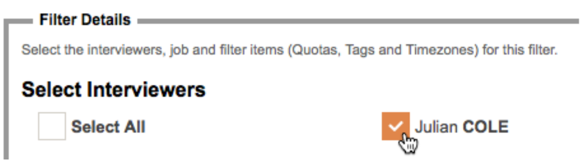
1. Choose the **User Filters** tab from under **MY CATI**



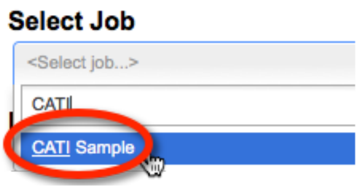
2. Click the **New CATI filter** toolbar button under the **User Filters** submenu.



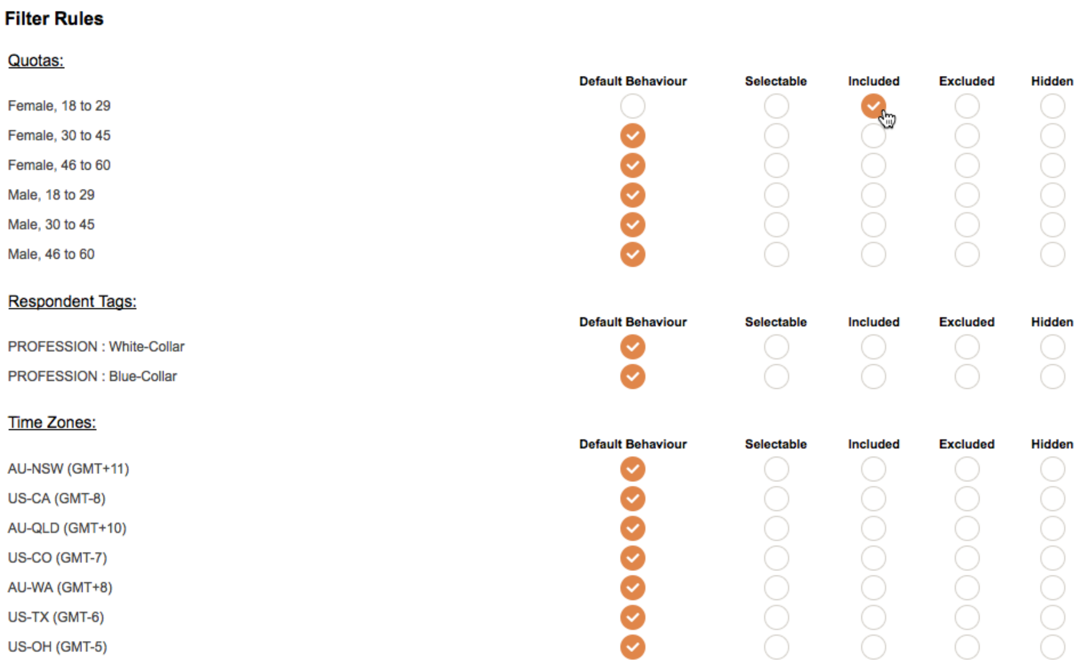
3. Choose the interviewers to set filters for



4. Choose a CATI job to apply filters to



5. Choose the rules for each filter element.



6. Click the **Save Filter** button

Filter Rule Settings

When setting a filter rule, you have the following choices on an individual filter element:

Default Behaviour	This option basically says "provide filter capabilities based on a person's access level". So, for CATI interviewers, this means don't provide this filter (since by default they can not use filters). For Senior CATI interviewers and above however, filters are visible (i.e. selectable) by default.
Selectable	This filter will be available in the filter window for use. This choice only really needs to be set for CATI interviewers – every other level of user will be able to select a filter element by default anyway.
Included	This filter element will always be used in every filter – so only respondents that have this filter element will be shown. Mandatory filter elements are denoted by a lock symbol in the CATI filter bar. 
Excluded	This filter element will always be used in every filter as an "exclusion" – so only respondents that do not have this filter element will be shown. Mandatory filter element exclusions are denoted by a lock symbol in the CATI filter bar, and a line through the element description.
Hidden	Filter element will not be visible, or available for use.

Setting Time Zone Rules

Time zones are a key element of the CATI system, because there are likely to be times when the current time for the interviewer and the respondent is different due to their location.

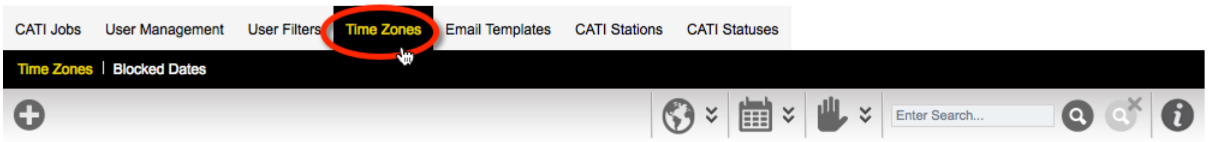
Statements such as "I'm happy for someone to call me at 2pm" from a respondent really mean "I'm happy for someone to call me at 2pm my time". The actual call may need to be made at 4pm by an interviewer.

Failure to respect time zone differences can lead to a number of problems:

- Appointment times may be wrong
- A person may be called before or after a reasonable hour (it may be 9am for an interviewer, but 6am for a respondent!)
- A respondent may be missed (for example, it is after business hours for the respondent when they are called)

<u>When is an appropriate time to call someone?</u>

It is common sense to say that calling someone at 2am in the morning is unacceptable. The exact rules, however, need to be quantified in CATI through the **Time Zones** tab.



By default, a global time zone rule exists:

Time Zone	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Start Time	Stop Time
Applies To All Time Zones	Yes	Yes	Yes	Yes	Yes	No	No	09:00 AM	12:00 PM
Applies To All Time Zones	Yes	Yes	Yes	Yes	Yes	Yes	No	01:00 PM	05:00 PM

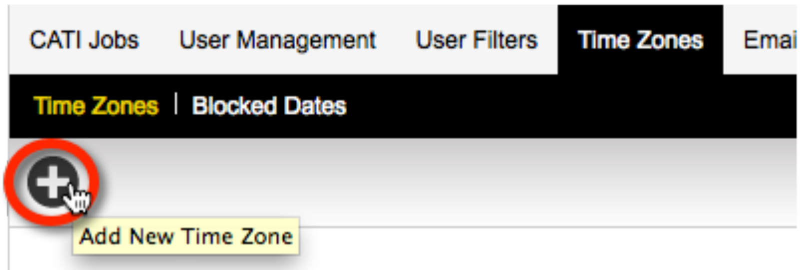
This rule says:

1. On Monday to Friday, people can be called between 9:00am and 12:00pm then from 1:00pm to 5:00pm
2. On Saturday, people can be called between 9:00am and 12:00pm

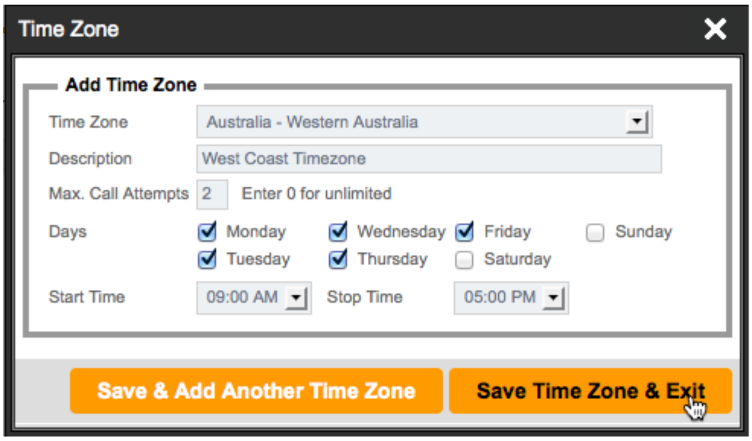
Because this applies to all time zones, it will apply to everyone. The rule will be applied taking a respondent's current time in their location into account.

<u>Setting specific rules for a time zone</u>

To set a specific time zone, click the **Add Time Zone** toolbar button.



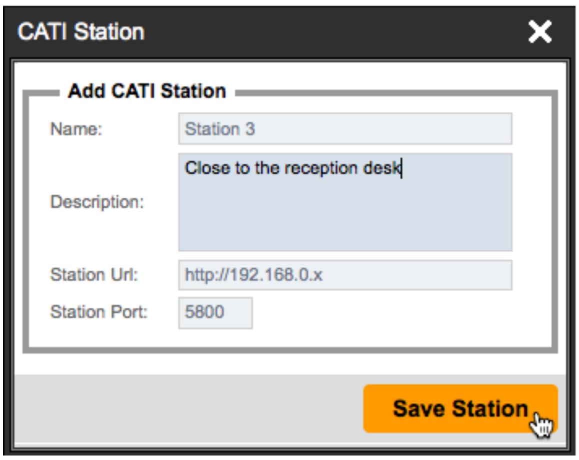
The time zone details can be entered into the **Time Zone** window.



Note that when you add details for a specific time zone, it **<u>replaces</u>** the default time zone details. The default is then ignored and only time zone rules for the specific time zone will be considered.

Setting up CATI Stations

Each CATI workstation that is used a call center needs to be set up through the **CATI Stations** tab.



The **Station URL** and **Station Port** are used to identify the workstation for the purposes of viewing the screen by a supervisor. See the next section about setting up interviewer screen viewing for full details about what to enter for each CATI station.

Setting up CATI Statuses

CATI statuses can be set up to allow you to configure your CATI system to work with your preferred workflow. The CATI system will log everything that occurs for a particular respondent using the CATI statuses that have been set up. Statuses are added to a respondent's call log in one of two ways:

1. System statuses are added automatically by the system at appropriate times (for example, an "Opened" system status is added every time an interviewer opens a respondent to make a call)
2. Interviewers can add statuses to the call log that indicate what they have done for the respondent – for example, if there is no answer, a "No Answer" status can be added for a respondent.

System Statuses

System statuses cannot be changed or deleted – they are used by the system to manage automated areas of the CATI process. Below is the list of the system statuses and details about when they are used.

OPENED	Every time an interviewer chooses a respondent, their details are shown onscreen, and they are immediately given an "Opened" status in their log. This can be used to see which interviewers have opened a particular respondent, and when.
CONTACTUPDATED	If an interviewer chooses to update the details that have been entered for a respondent, the fact they updated the details is tracked through the "Contact Updated" flag.
SKIPPED	Sometimes an interviewer may press "Next Contact" and get the next respondent, and for some reason they want to skip this respondent and move onto the next one. The system allows respondents to be skipped, but the fact they were skipped is tracked by giving them a "skipped" transaction in their log. By default, a "skipped" person will not appear in the interviewer's list of calls for 1 hour (they will still be visible to other interviewers).
APPOINTMENTCANCELLED	If an appointment was created, and subsequently cancelled, this transaction is generated to show when the cancellation was made, and by whom.
APPOINTMENTUPDATED	If an appointment was created, and subsequently changed to a new time and date, this transaction is generated to show when the update was made, and by whom.
APPOINTMENTDELAYED	Upcoming appointments are shown to the interviewer who needs to make the call just before the appointment is due. If the interviewer requests a delay of 15 minutes for the appointment, the appointment time will be shifted, and this transaction will be created.

CONTACTLIMITREACHED	This is a final status for respondents who should not be called again. There are two ways this status will be added to a respondent: 1. One of the other statuses has reached it's limit (for example, number of "no answers" has reached the maximum of 3). 2. The overall contact limit – total number of times a person can be contacted, regardless of the status – has been reached. We will see how these settings are set in the next section.
NOTATTEMPTED	If an interviewer opens a respondent, then immediately closes them, they are flagged as "Not Attempted". This is different from skipping, since the person remains in the queue of people to call. An interviewer may do this when they need to take a toilet break, for example. When they return, they are happy for the respondent to still be in the list of people for them to call.
LINKCLICKED	If an Email has been sent to a respondent, and they have clicked on the survey link, a "Link Clicked" status will appear in the person's log. This will make it easy for an interviewer to see that a person has at least started the survey.
SURVEYSTARTED	Once a respondent begins their survey online (either from an Email sent by an interviewer, or possibly from a separate invitation that has been sent to them) the "Survey Started" status is added to their log.
CONTACTREOPENED	If a contact has been closed by the system due to something other than a successful completion of a survey (for example, if CONTACTLIMITREACHED has occurred) there is the ability to reopen contacts so they can be called again. When they are reopened, a transaction is created with this status.
QUOTAOUT	If a person completes the survey on the Web, and they exceed the required quota for the survey, they will be flagged as a quota out.
SCREENOUT	If a person completes the survey on the Web, and they are not an appropriate type of for the survey, they will be flagged as a screen out.
COMPLETE	If a person successfully completes a survey on the Web, they will be flagged as a Complete.
TESTCONTACT	If an interviewer invokes a test run of the interview, a copy of a live contact is made for the test. The copied contact will have this transaction added to their log.
TESTMODESTARTED	This transaction is placed on a live contact that has been copied for a test of the process.

Custom Status Categories

All other CATI statuses can be set up to meet your requirements for your CATI workflow. The number and type of statuses is completely up to you. These statuses fall into the following categories:

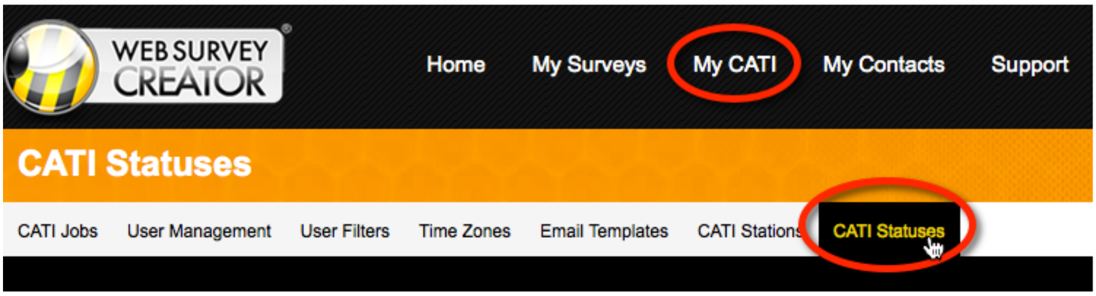
Incomplete	Statuses in this category all relate to things that have occurred without the call being completed (for example, "no answer")

Hard Refusal	If a respondent makes it clear they do not want to participate this is a "Hard Refusal". For example, if they say "I don't want to do it – don't call again". Statuses in this category will remove the respondent from the call list.
Soft Refusal	A soft refusal is not as emphatic at hard refusals – for example "I don't feel like doing this at the moment". Statuses in this category will delay calling back of the respondent based upon the delay set up in the individual status.
Appointment	Appointments can be set up to organise a call to a respondent at a later stage. Any statuses set up within the Appointment category will allow an appointment to be set.
Email	All statuses set up under the Email category will allow an interviewer to select any of the Email templates that have been set up to send to respondents.
Supervisor	Statuses under the supervisor category will cause a call to be flagged as requiring supervisor assistance. These calls are easy for a supervisor to find and deal with.
Final	Statuses that are final will close a respondent down – they will no longer be in the call list.

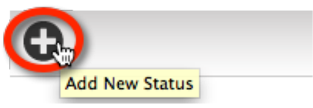
Setting up a Custom Status

The steps to set up a custom status are as follows:

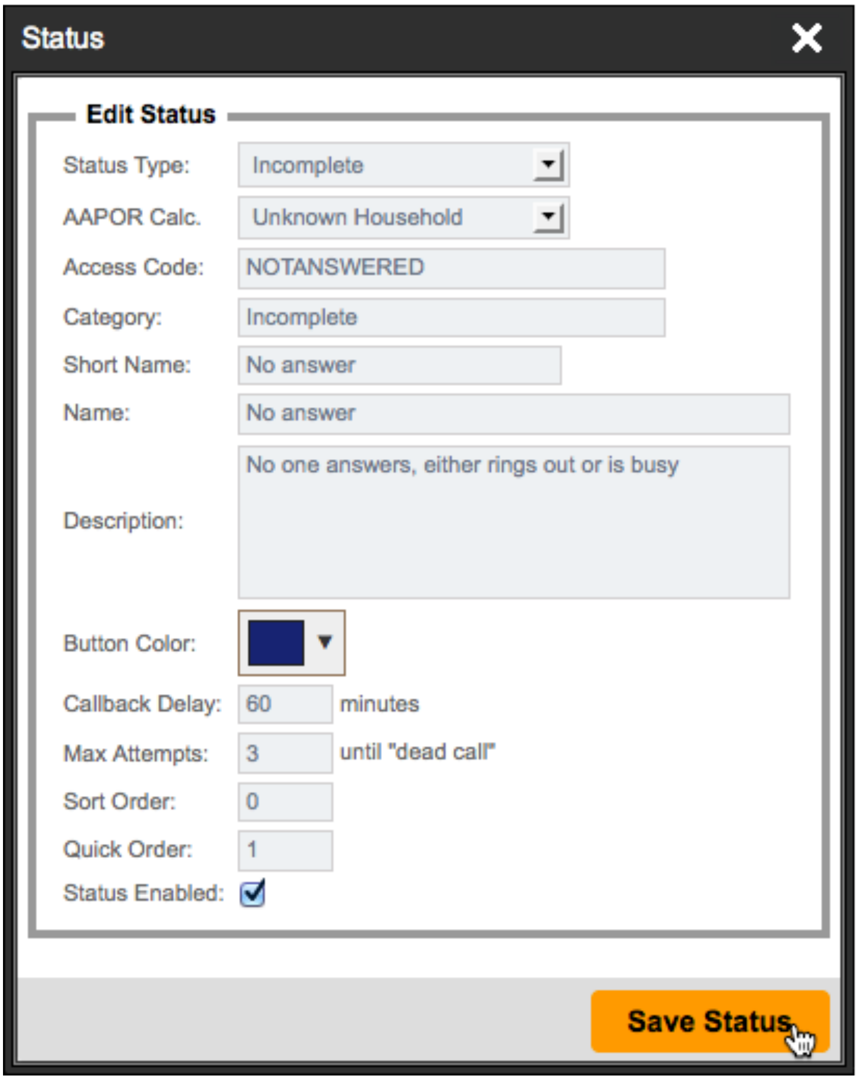
1. Click the **CATI Statuses tab** under **My CATI**



2. Click **Add New Status** on the toolbar

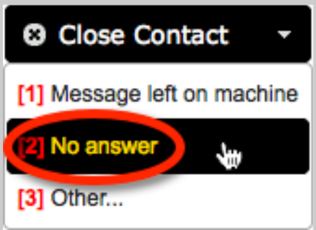


3. Enter the details for the status, and press the **Save Status button**. Descriptions for the details that can be entered are shown below.



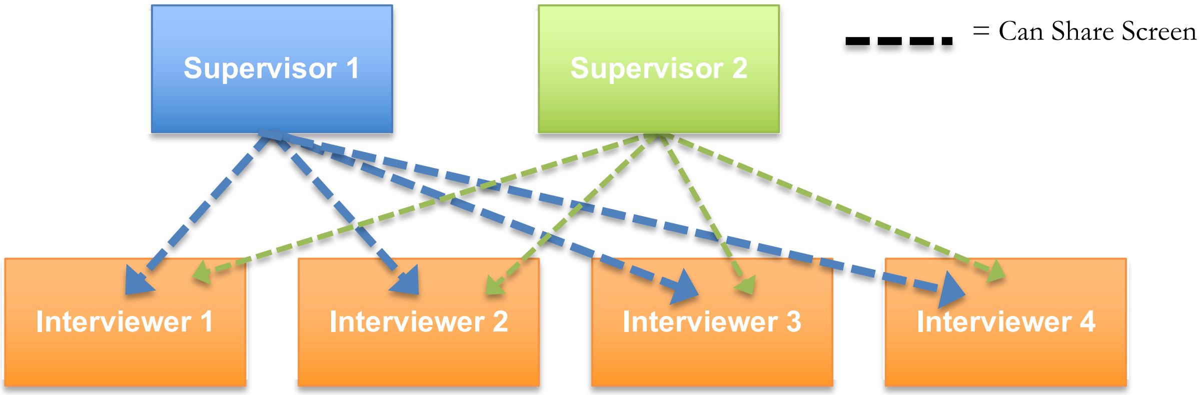
The most important aspect to setting up a status is understanding what each of the settings in the status details is used for. The table below describes these settings:

Status Type	The type of status defines what effect choosing this status will have on a respondent. For example, if the status type is "Final", when this status is chosen, a respondent is removed from the pool of people who may be called.
AAPOR Calc.	Outcome rates can be calculated following the formulas worked out by the American Association for Public Opinion Research (AAPOR) if statuses are placed into the correct calculation categories. For further information, see http://www.aapor.org/Response_Rates_An_Overview1.htm
Access Code	This code will be shown in the log for this status.
Category	You can categorise statuses however you like - these categories can then be used in filters.
Short Name	This is a short name for the status that can be used in areas where there is no space to show the full name
Name	This is the full name of the status

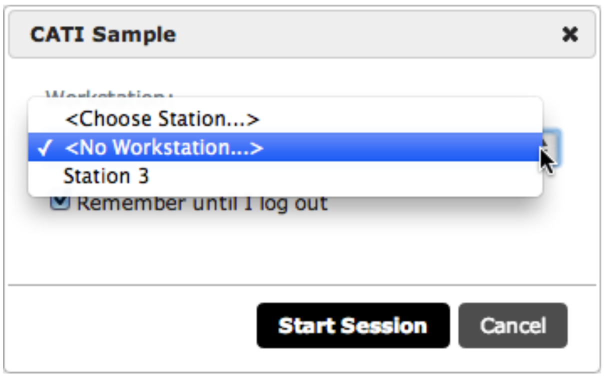
Description	This description is shown in the browse of statuses. It can help explain what the status is used for.
Button Color	When this status is used in a call log, it can be given a specific colour so that it can be distinguished easily from other statuses. For example, all final statuses may be set to red to indicate that they terminate all calls to the respondent.
Callback Delay	You may optionally choose to take a respondent out of the calling pool when this status is chosen. Entering a positive number of minutes in this field will indicate how long they will be excluded from the pool. An example would be setting a 60 minute delay when a person is called and there is no answer. The next time the person would appear as a contact for someone to call would be a minimum of 60 minutes after the no answer status was set on the respondent.
Max Attempts	If a non-zero amount is entered for this field, this will be the maximum number of times this status can be used on a respondent before they are immediately given a status **CONTACTLIMITREACHED** (and they are permanently excluded from the calling pool). An example would be setting this value to 3 for a "No Answer" status. This would mean that if a person is called 3 times with a result that there is no answer, their status would be changed as soon as the third "No Answer" status is added.
Sort Order	This is a numeric that can be optionally entered to affect what order this status is shown in listings, relative to other statuses.
Quick Order	The quick order sets the ordinal position for the status in the "Quick Menu" that appears when a contact is closed. Only the most used statuses would ever be set up with a quick order. 

Setting up Interviewer Screen Viewing

It is important for supervisors to be able to verify the performance of interviewers. Key to this process is the ability to view an interviewer's screen. The way this needs to operate can be represented as follows:



In reality, the screen sharing relates to viewing the screen on a workstation. In order to see an interviewer's screen, the supervisor needs to know which computer (workstation) an interviewer is using. This is why whenever an interviewer goes into a CATI job, they are asked to choose their workstation.



This means that workstations need to be set up. The exact details to be entered for each workstation are discussed in the next section.

Installing Screen Viewer Software on a Workstation

Each workstation that will be used for screen viewing must be set up. We support the UltraVNC screen sharing tool – it can be installed free of charge on as many workstations as you need.

UltraVNC is a great balance of performance and cost. It is free, yet provides everything needed for screen sharing. Note that is can only be installed on Windows computers.

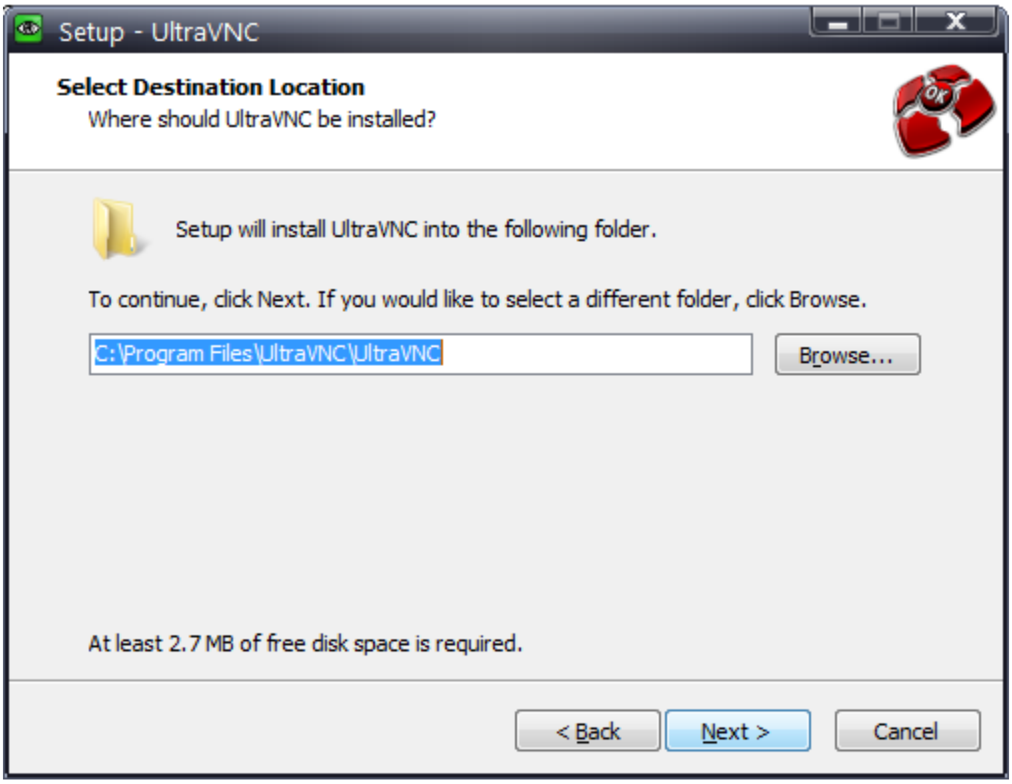
The steps in setting up workstations are as follows:

1. Run the VNC installation file. There are two different installations - ensure you run the appropriate version for your workstation.

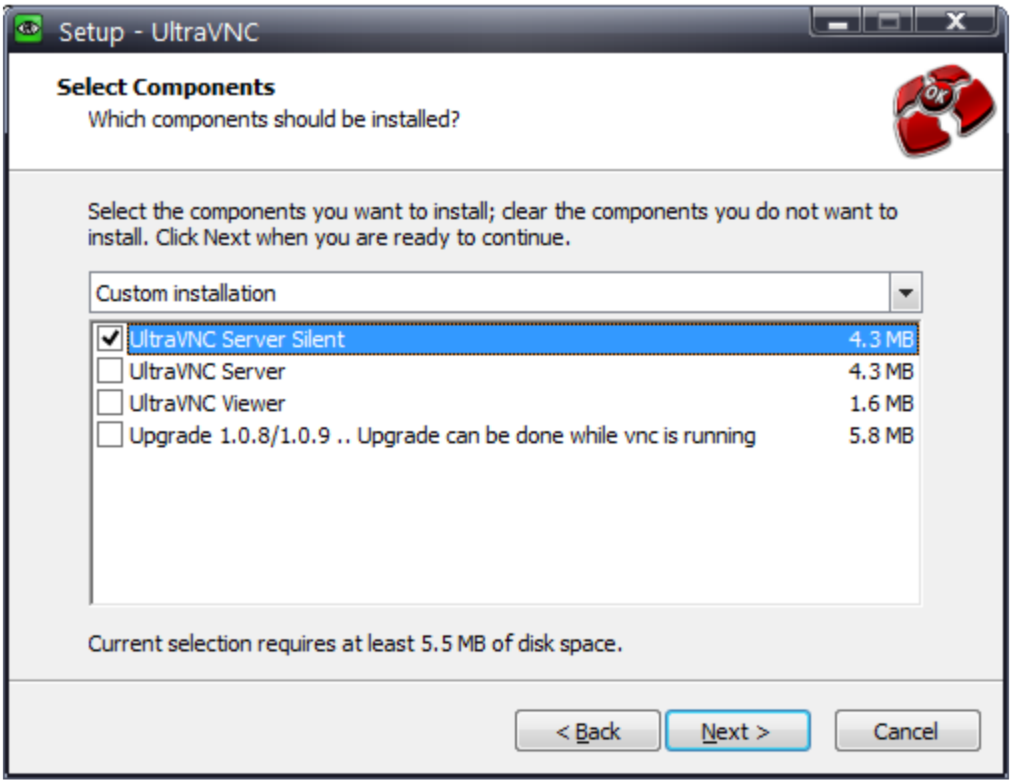
   Installation for 64-bit Windows
   http://www.websurveycreator.com/resources/UltraVNC_1_1_9_X64_Setup.exe

   Installation for 32-bit Windows
   http://www.websurveycreator.com/resources/UltraVNC_1_1_9_X86_Setup.exe

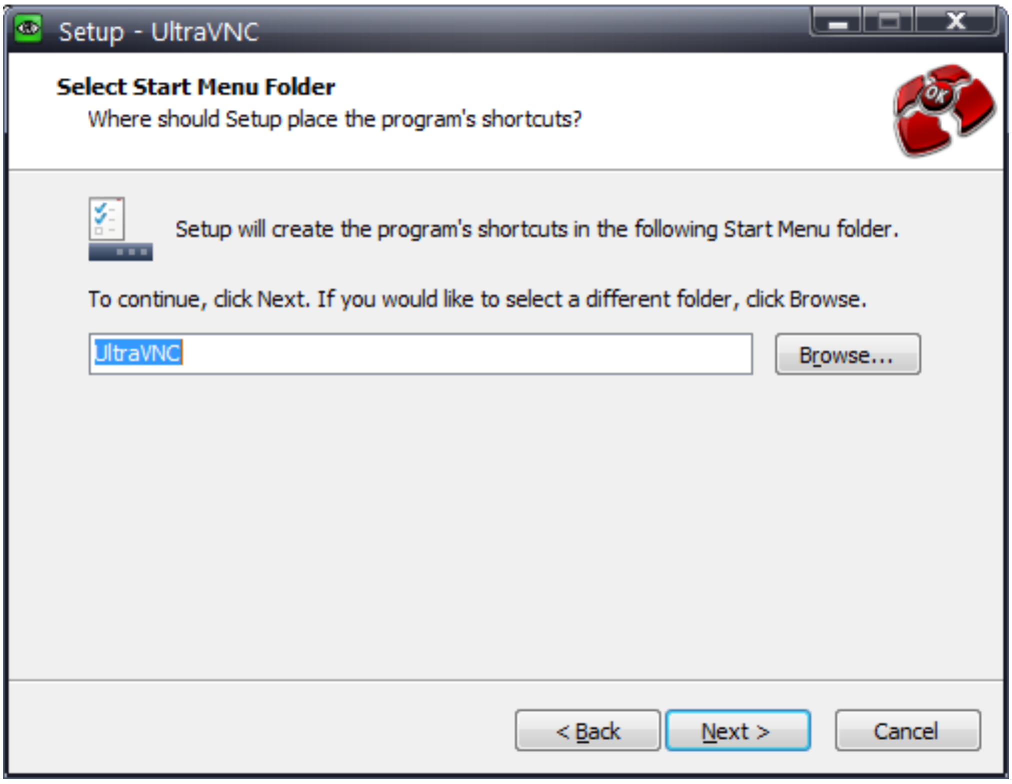
2. Enter the installation directory. In most cases the default directory is fine. Click **NEXT**



3. When asked for which components to install, select "UltraVNC Server Silent". Click **NEXT**

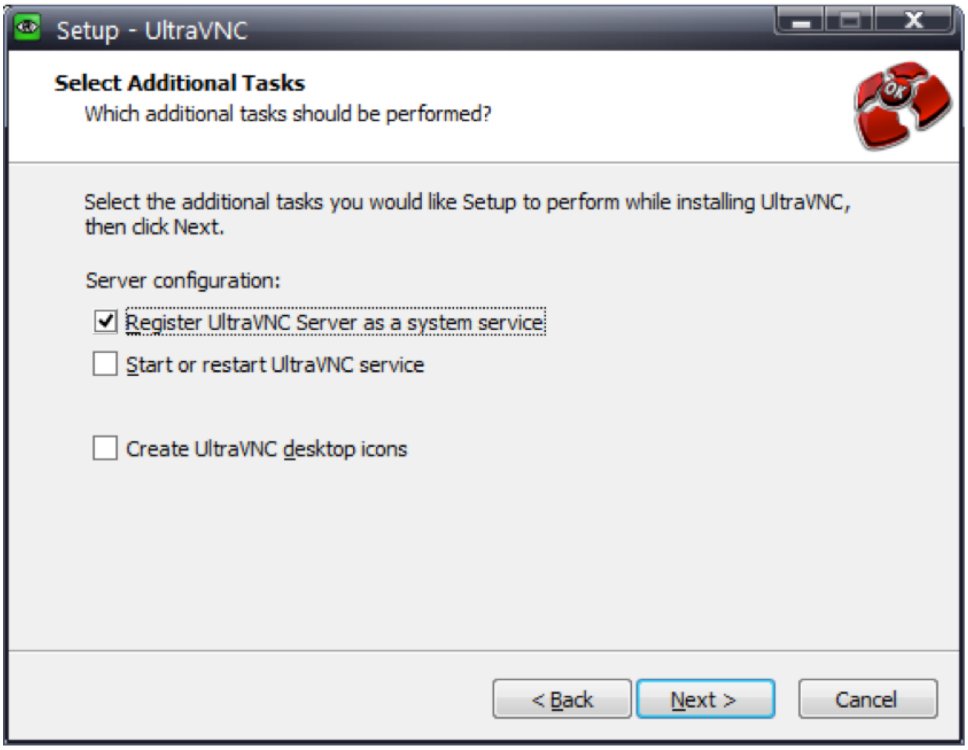


4. Enter the Start Menu shortcut folder. In most cases the default directory is fine. These shortcuts can be removed at a later stage. Click **NEXT**



5. You can choose to either install the software as a program that can be run, or as a service (which is run in the background). Ticking the system service checkbox, and installing it as a service,

means the software will run every time the machine is rebooted. Click **NEXT**



6. Click **INSTALL**
7. Click on the Start Menu, locate and run "**UltraVNC settings**"
8. Enter the following settings
    a. In the Network tab
        i. Tick **Enable incoming port**
        ii. Tick **Enable Java port**
        iii. Customise the **RFB Port** and **Http Port** if required however the standard ports will be fine in most installations. Ensure that your firewall has allowed traffic through these ports
    b. In the Input/File Transfer tab
        i. Tick **Disabled Viewer inputs**
    c. In the Misc/logging tab
        i. Tick **Disable Tray icon**
9. In the Task Bar you will find the UltraVNC icon. Right click and select Admin Properties
10. Enter the following settings
    a. In the Incoming Connections
        i. Tick **Accept Socket Connections**
        ii. Tick **Enable JavaViewer (Http Connect)**
        iii. Untick **Allow Loopback Connections**
    b. In Authentication
        i. Enter a VNC Password and a View-Only Password. **Note that these will be asked every time a workstation is viewed. Only Supervisors should be aware of the password you choose.**
    c. In File Transfer
        i. Untick **Enabled**
        ii. Untick **User impersonation**
    d. In Keyboard & Mouse
        i. Tick Disable Viewers inputs

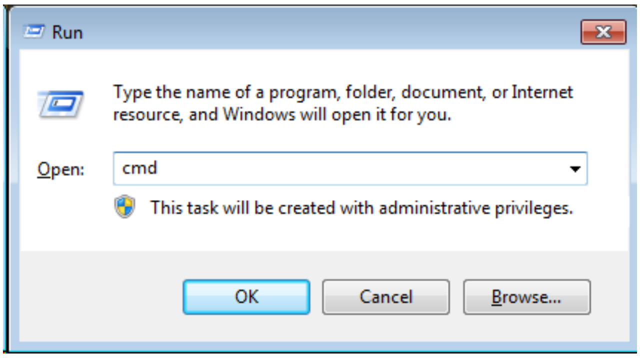
e. In Misc.
    i. Tick Disable **TrayIcon**
    ii. Tick **Forbid the user to close down WinVNC**

11. Click **OK**

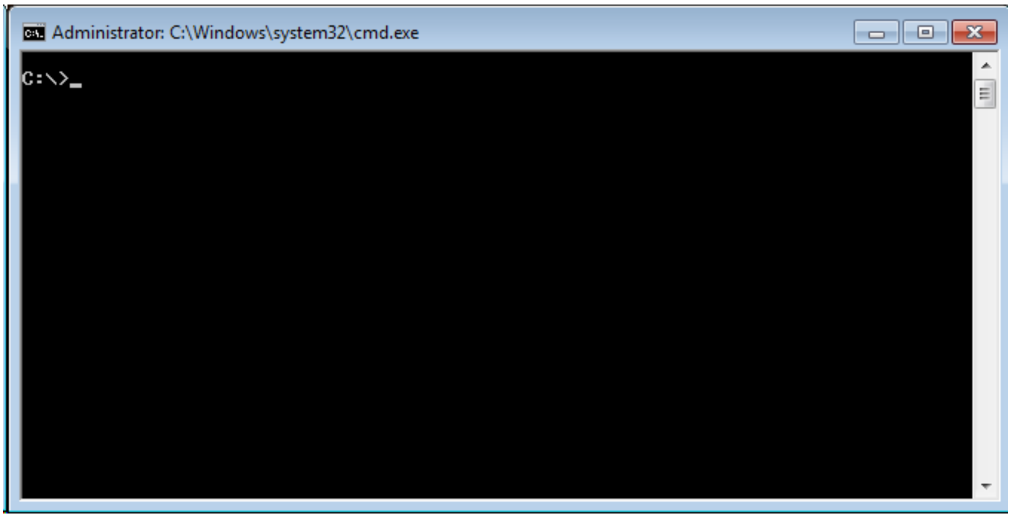
The next step is to find the workstation's IP address. To do this:

1. Click on the Start Menu and select **RUN**

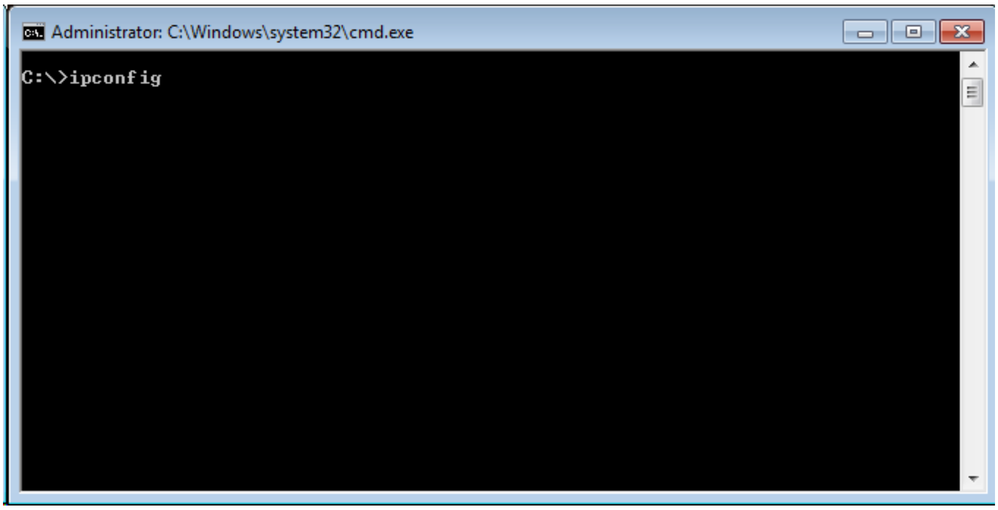
2. In the Open field type in "**CMD**" and click **OK**



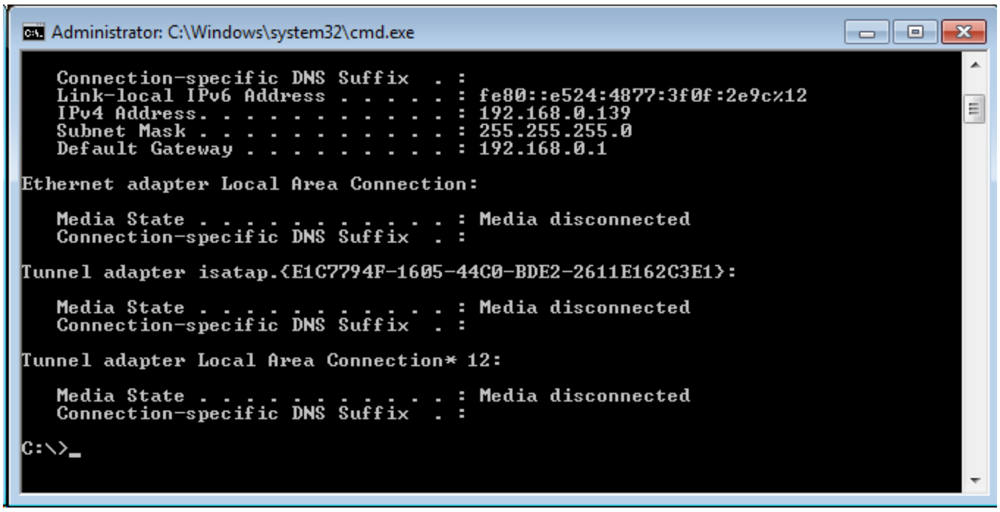
This will open a Command Prompt window



3. Type "**ipconfig**" and press **ENTER**



4. You will get a number of results. In most cases you will only have one active network connection so look for a reference to the IPv4 Address and note this down. This is your IP Address. In the example below the address is 192.168.0.139



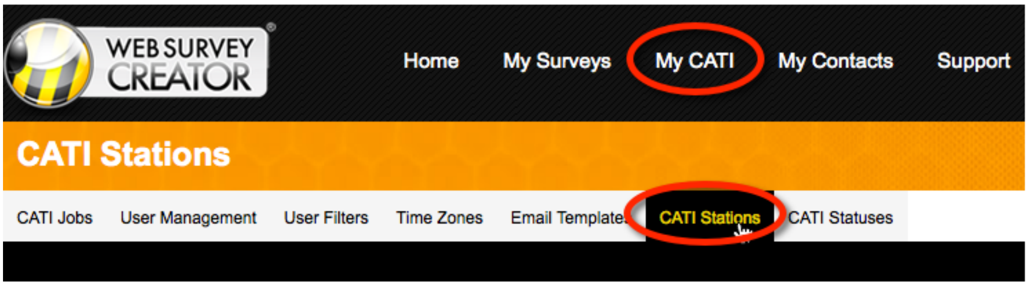
Testing the connection to the CATI workstation

1. Log onto another workstation which sits on the same network as the CATI workstation and open a web browser
2. In the address bar type in the CATI workstation's IP address and Port number. In the previous example we would enter 192.168.0.139:5800. Press **ENTER.**
3. You may be asked to install JAVA if it is not already installed. If this is the then please following the instructions provided by your browser.
4. Once the page has loaded you will be asked for a password. Enter the View-Only Password that you entered in step 10b(i).

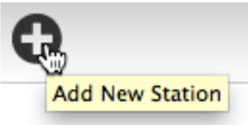
Setting up a Workstation for Screen Viewing

In the previous example, a workstation was set up that had an IP address of 192.168.0.139, and the default port of 5800 was used in the screen viewer software setup. The steps to set up this computer as a "Workstation" in WSC that supports screen viewing are as follows:

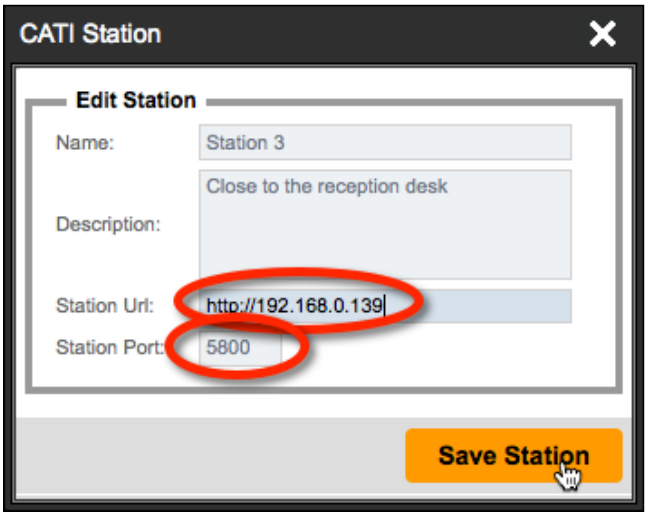
1. In WSC, click on **My CATI**, and go to the **CATI Stations tab**



2. Click **Add New Station** on the toolbar



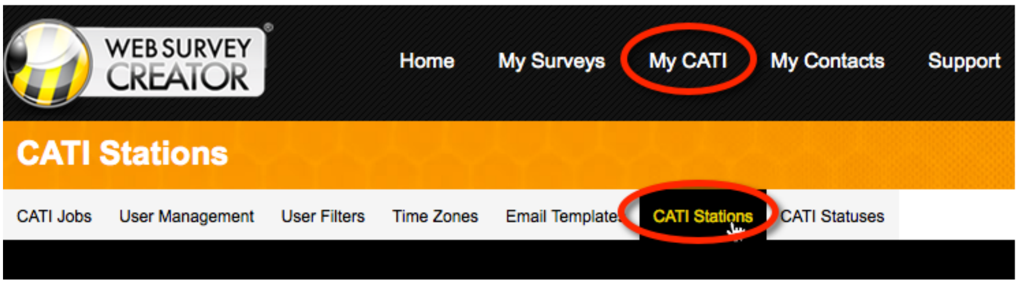
3. Enter the details for the Workstation. The key details that need to be entered are the IP Address for the Station URL and the Station Port.



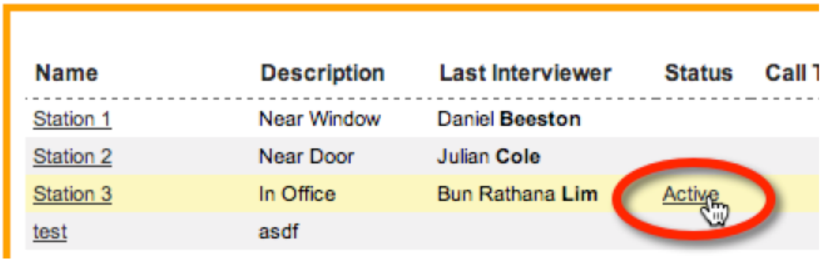
Viewing a Workstation through WSC

A supervisor can view a Workstation at any time through the following steps:

1. In WSC, click on **My CATI**, and go to the **CATI Stations tab**



2. Click on the **Active** link in the CATI station list to view the interviewer that is currently using a particular workstation.



3. You may be asked to install JAVA if it is not already installed. If this is the then please following the instructions provided by your browser.

4. Once the page has loaded you will be asked for a password. Enter the View-Only Password that you entered in step 10, b, i.

5. The Workstation screen will be shown

The CATI Interviewer Module

The people who make the calls for CATI – the interviewers – use a module outside of the main Web Survey Creator application. This means that they can have a login that is restricted to them performing their job as an interviewer, and also makes training simpler because they are presented with an interface that only includes features they need to be able to perform their jobs as interviewers.

The CATI module is available on the "cati subdomain" related to the Web Survey Creator site. For example, the main Web Survey Creator site, and associated subdomain Web Addresses in the following format ("mywscsite" would be replaced by the actual domain used for WSC):

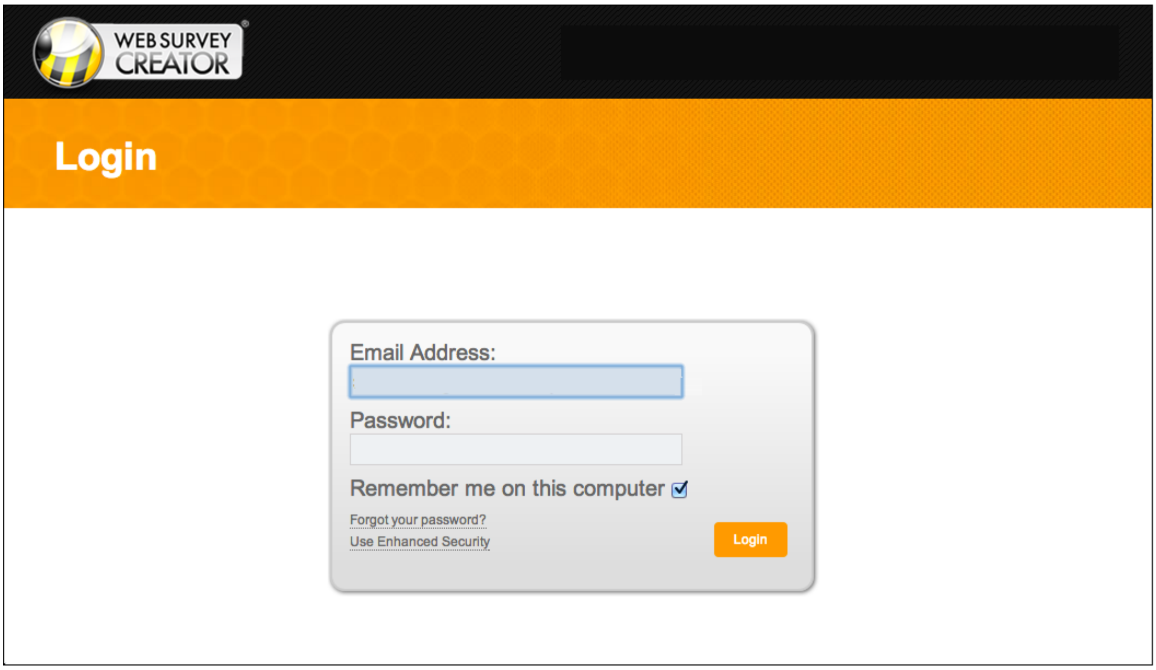
Main WSC Site	http://www.mywscsite.com
CATI Site	http://cati.mywscsite.com

Key Features of the Interviewer Module

Before looking at an example workflow for an Interviewer, it is useful to understand the key features available through the site.

Simple Site Login

When an interviewer goes to the CATI site, they are required to enter a login. Usually they will be set up with a login that will only allow them to access the CATI site, with no access to the main site.



Quick Job Access

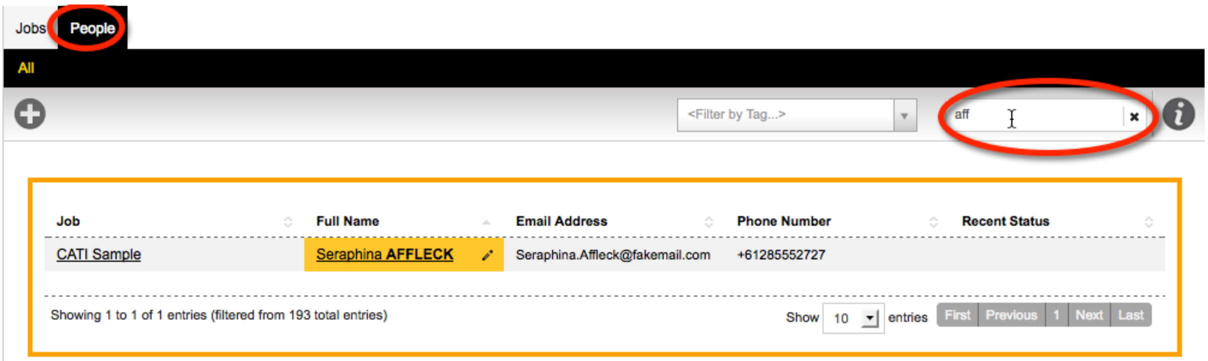
Each CATI job that the interviewer can access is shown once they log in on the **Jobs tab**. Key features of this tab are:

- The ability to enter a search to find a specific job
- Job ordering by any column

- The ability to choose how many jobs to show on a single page

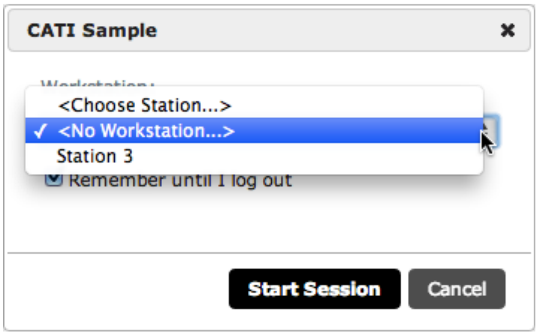
Quick Person Access

All the people (respondents) who are in currently live CATI jobs can be accessed from the **People tab**. The fast searching available in this tab is designed to make looking up a particular person quick and easy. This is particularly useful when a person calls in and you need to look them up without knowing what job they may currently be in.



Workstation tracking

When an interviewer starts a job, the workstation they are using can be chosen. This allows an administrator to track who is working where, and once the interviewer is logged into a workstation an administrator can watch their screen.

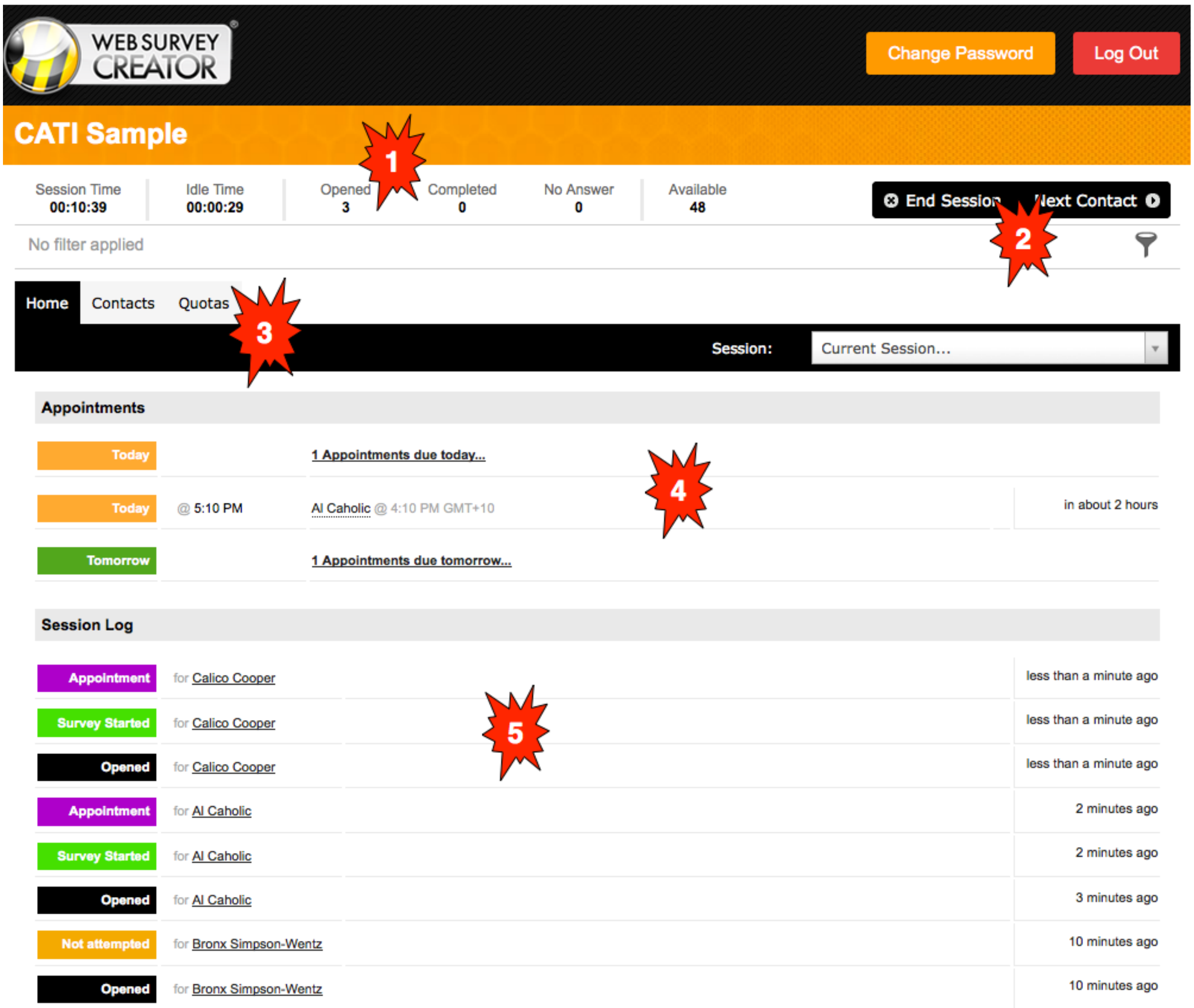


Administrators have the option of choosing **<No Workstation…>**. This allows an administrator to enter the CATI interviewer application, and use it without being forced to choose an actual workstation (since they may be running the application from somewhere other than one of the pre-defined workstation computers)

CATI Home

The interface for the main CATI screen – the CATI Home tab - is shown below. The key interface elements are:

1. Statistics for the current CATI session
2. Quick access to **End Session** button, and the ability to immediately start calling people with the **Next Contact** button
3. Access to a list of **Contacts** and **Quotas** from the tab selection bar
4. A listing of upcoming appointments
5. A complete listing of everything that has occurred in the current session

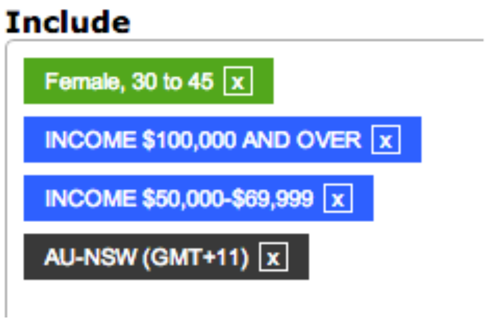


Advanced Filtering Capability

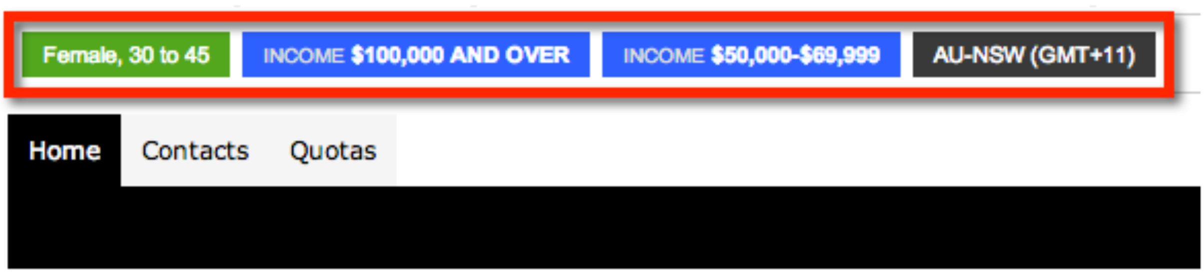
For interviewers with the appropriate level of access, the respondents that will be called can be filtered on through the filtering system.

A filter can be based upon any combination of:

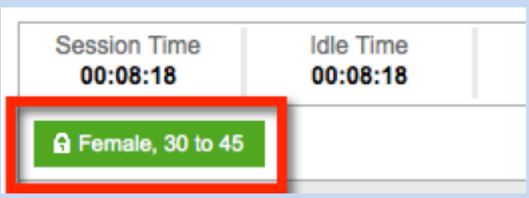
- Respondent Tags
- Quotas
- Time zones



The filters that are chosen are shown on the main CATI window.

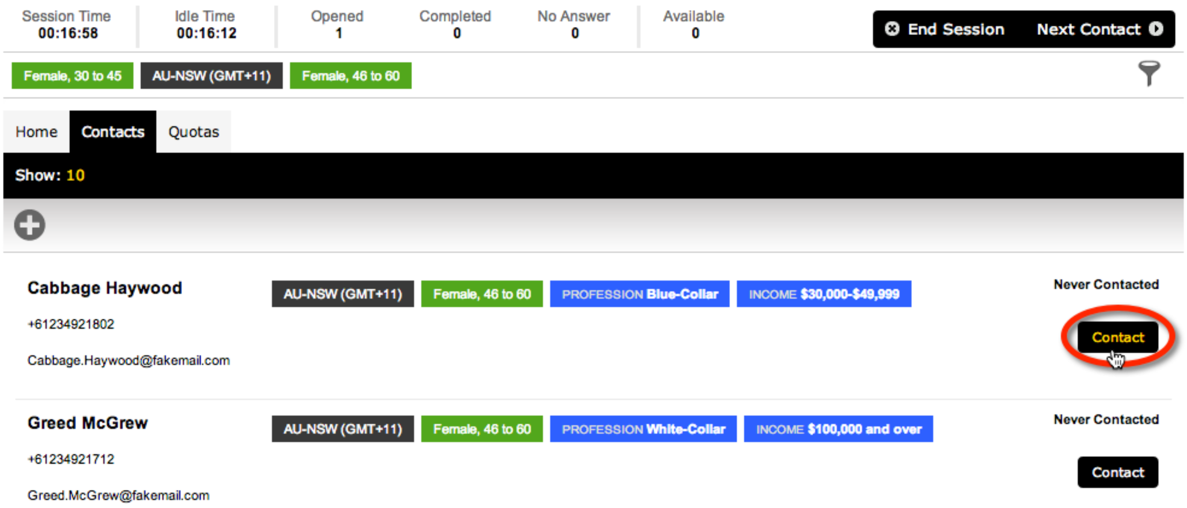


By default filtering can only be changed by Senior CATI interviewers and above. Administrators can lock in base filters for particular interviewers and jobs – thus ensuring interviewers focus on specific respondents. Base filters have a lock symbol next to them to indicate that they can not be removed by the interviewer.



Upcoming Contacts Browse

Senior CATI interviewers and above can view a list of the upcoming contacts in the call list by going to the **Contacts tab**. They can call a specific person on the list by pressing the appropriate **Contact button**, rather than pressing **Next Contact** and accepting whatever person the system wishes to serve up next.



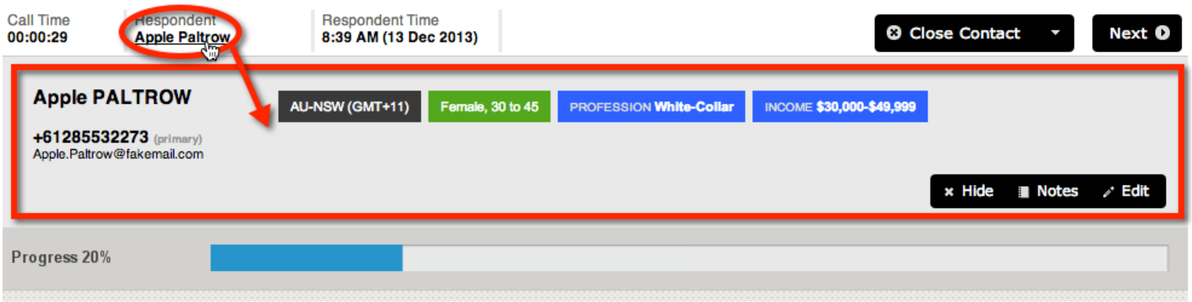
Quota Statistics

The current status of all quotas can be viewed under the **Quota tab**. This makes it easy to see which quotas are filling more quickly than others, and may be used when deciding what filters to use (eg. So that quotas that are more empty can be focused on).

Quota Title	Limit	In Quota	Remaining	Draft
Total	**No Limit**	**1**		**1**
Female, 18 to 29	10	-	10	-
Female, 30 to 45	10	-	10	-
Female, 46 to 60	2	1	1	-
Male, 18 to 29	10	-	10	1
Male, 30 to 45	10	-	10	-
Male, 46 to 60	2	-	2	-

Respondent "Quick View"

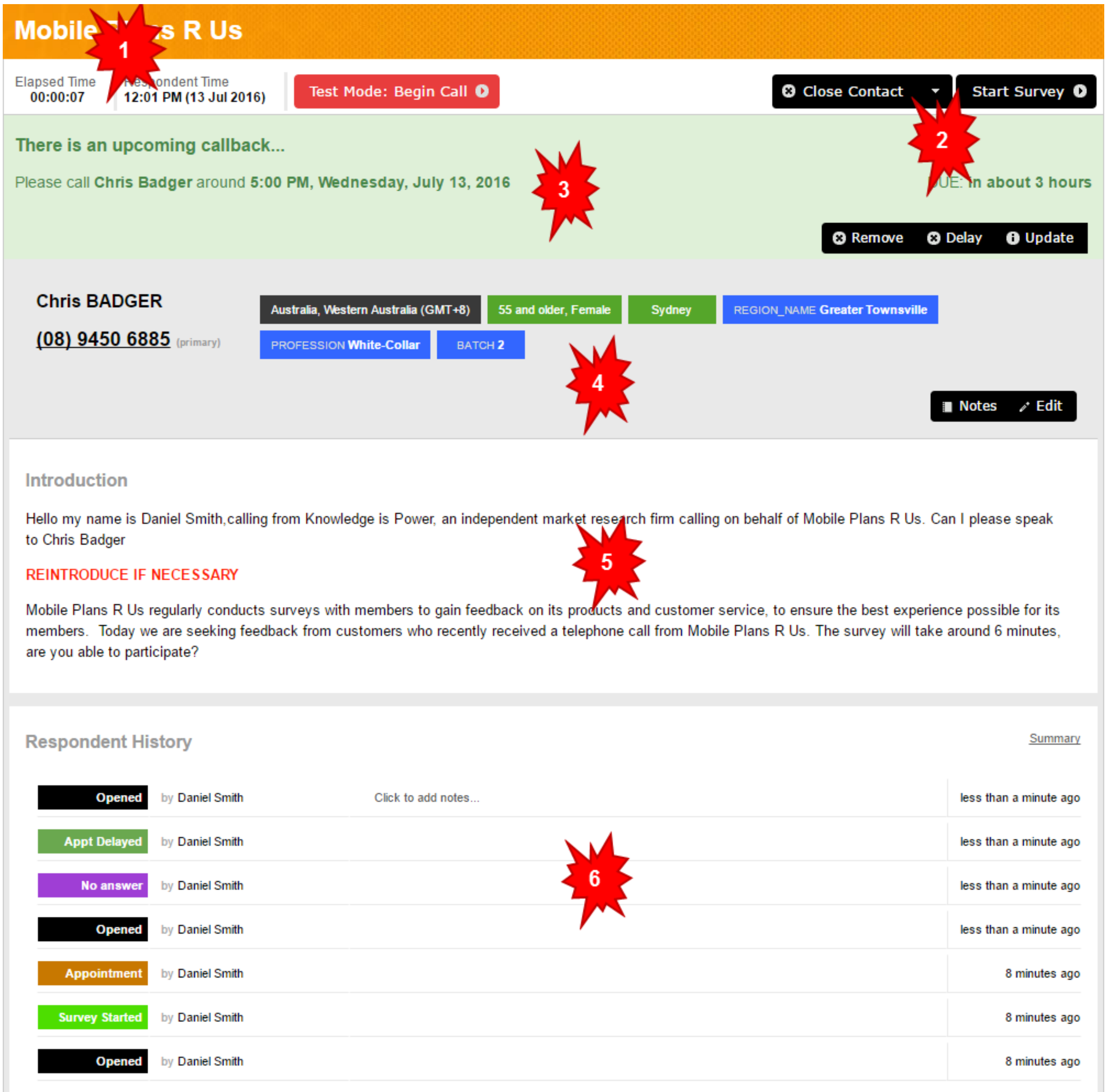
At any time during the interview process, full details for the respondent can be viewed by simply clicking on their name in the **Call Details Bar**.



<u>CATI Respondent View</u>

Before a survey is started, an interviewer will have the ability to read out an introduction paragraph, edit any contact details and review the contacts call history. The key interface elements are:

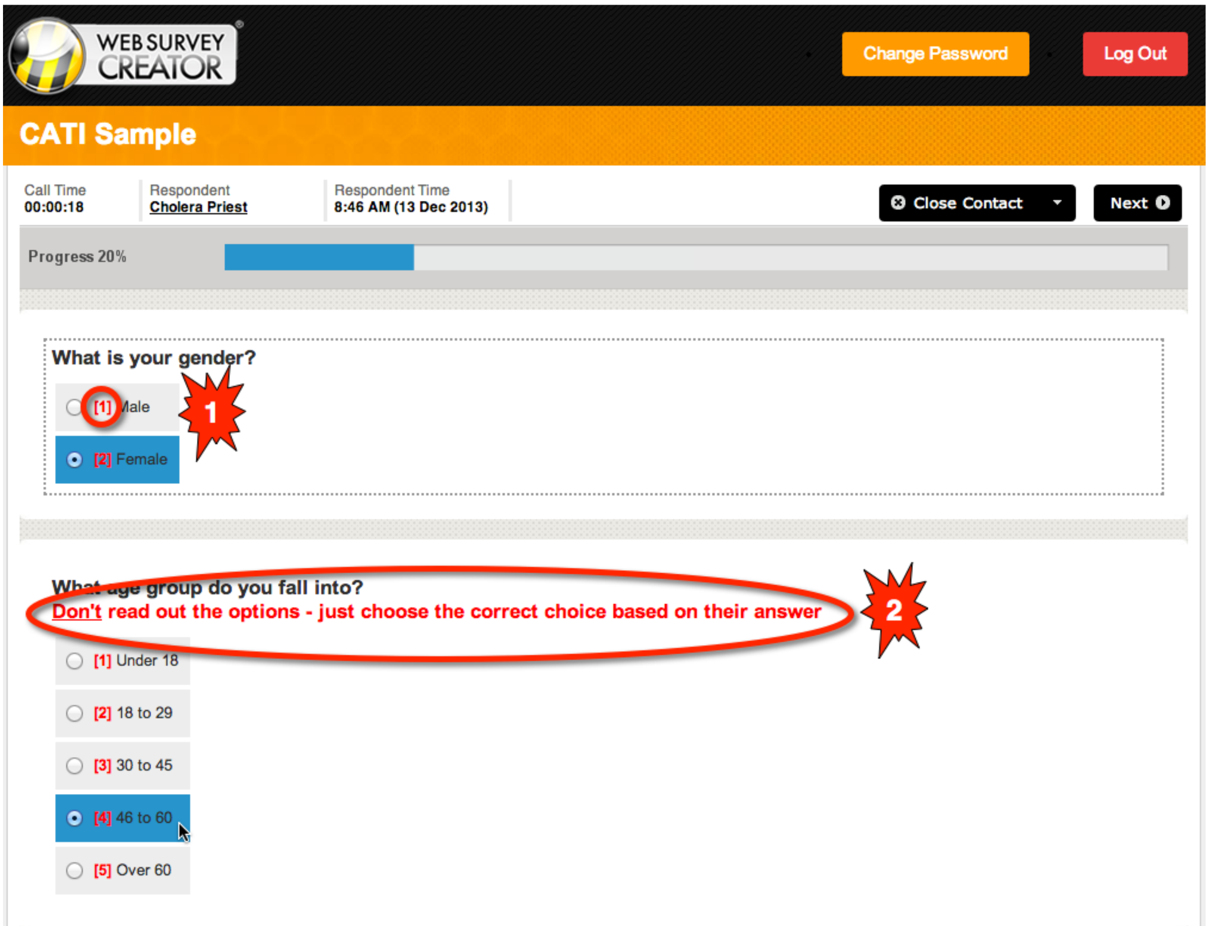
1. Overview information about this call
2. Functions to close the contact and start the survey
3. Details about the appointment (if applicable)
4. Details about the contact including their Time Zone, Quotas they fill and respondent tags with buttons to add notes and edit the contact
5. Introduction paragraph (optional) for the interviewer to read out before commencing the survey
6. Summary and detailed call history for this contact


Mobile
s R Us
1
Elapsed Time
00:00:07
ondent Time
12:01 PM (13 Jul 2016)
Test Mode: Begin Call
Close Contact
Start Survey
2
There is an upcoming callback...
Please call Chris Badger around 5:00 PM, Wednesday, July 13, 2016
3
UE: in about 3 hours
Remove
Delay
Update
Chris BADGER
(08) 9450 6885 (primary)
Australia, Western Australia (GMT+8)
55 and older, Female
Sydney
REGION_NAME Greater Townsville
PROFESSION White-Collar
BATCH 2
4
Notes
Edit
Introduction
Hello my name is Daniel Smith,calling from Knowledge is Power, an independent market research firm calling on behalf of Mobile Plans R Us. Can I please speak to Chris Badger
5
REINTRODUCE IF NECESSARY
Mobile Plans R Us regularly conducts surveys with members to gain feedback on its products and customer service, to ensure the best experience possible for its members. Today we are seeking feedback from customers who recently received a telephone call from Mobile Plans R Us. The survey will take around 6 minutes, are you able to participate?
Respondent History
Summary
Opened by Daniel Smith Click to add notes... less than a minute ago
Appt Delayed by Daniel Smith less than a minute ago
6
No answer by Daniel Smith less than a minute ago
Opened by Daniel Smith less than a minute ago
Appointment by Daniel Smith 8 minutes ago
Survey Started by Daniel Smith 8 minutes ago
Opened by Daniel Smith 8 minutes ago

Powerful Survey System

The survey system that powers the interviewer in the CATI module is the same system that is used for WSC Web Surveys. It has a number of features that are specifically designed to make the interview process easy and efficient:

1. All choice questions have hotkeys associated with them, allowing you to simply press a number on your keypad to answer a question
2. Additional CATI-Only text can be used throughout the survey to provide scripting that is not visible when a person on the Web does the survey.



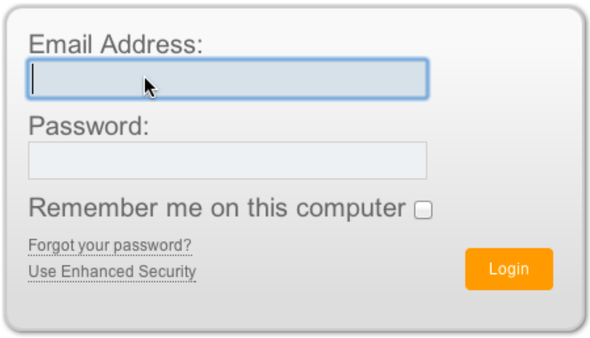
The entire interview process is designed so that it can be performed with a keyboard – that includes using your arrow keys to move between questions and pages, and pressing the tab key to move from one question to the next.

The Mixed-Mode Workflow

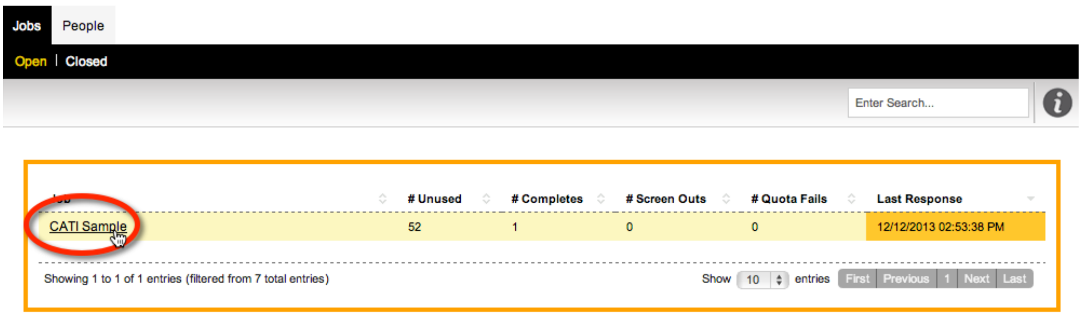
The easiest way to understand how to run mixed-mode processes in WSC is to see examples of common workflows. Regardless of the workflow, the first steps to using the Interviewer module are as follows:

1. Go to the WSC CATI site.

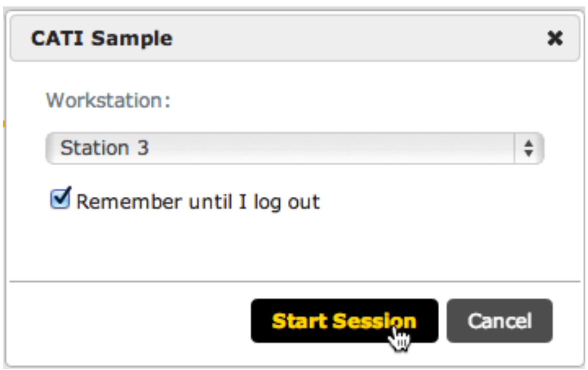
2. Log in to the site with the login and password that has been provided.



3. A list of the open CATI jobs will be shown. To begin a CATI process for a particular job, click on the job name in the browse.

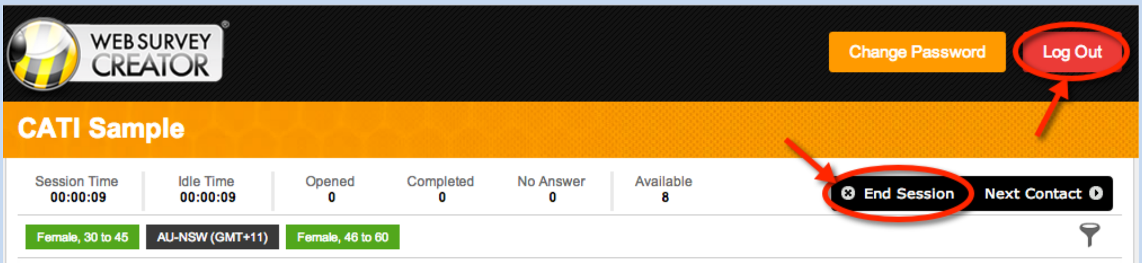


4. Next, choose the workstation call will be made from, and click **Start Session**.



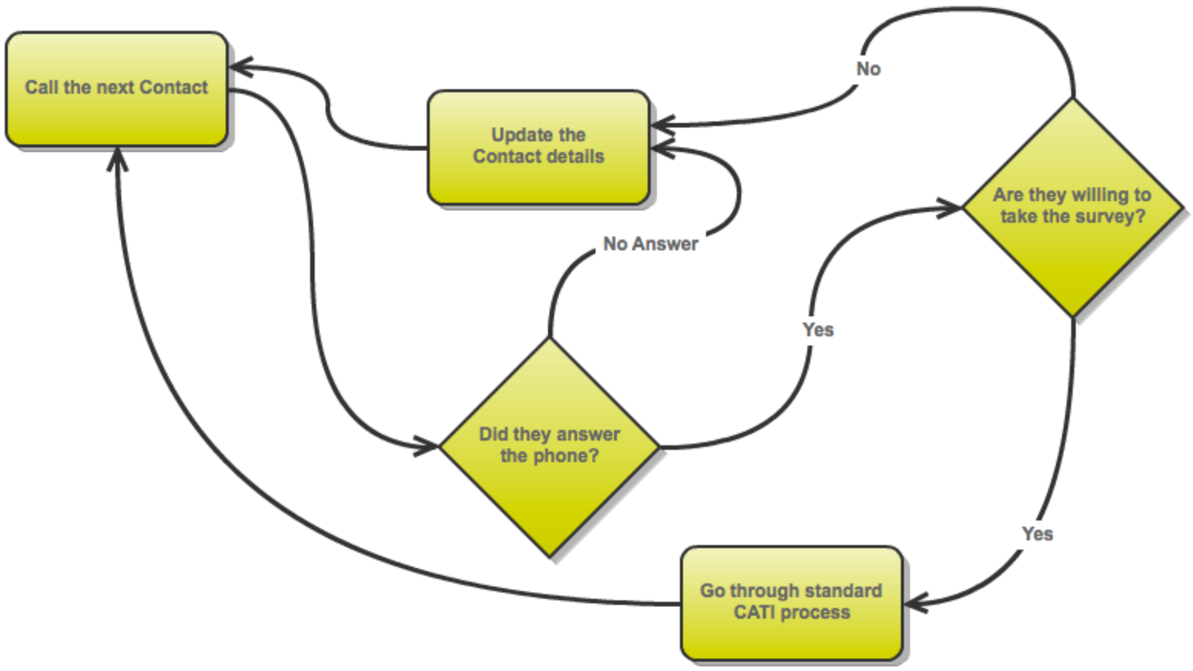
5. A **Session** is a block of time that the interviewer spends working in a particular job. Once they have started the session, the **CATI Home page** is shown. It is from this point that they begin one of the following workflows.

Once you are in a session, you are "on the clock". There are two ways to exit a session – logging out of the CATI module (which will return you to the login screen) or ending the session, which will take you to the Jobs Browse.



A Basic CATI Workflow

The simplest workflow for CATI is the standard workflow all CATI products deal with as follows:



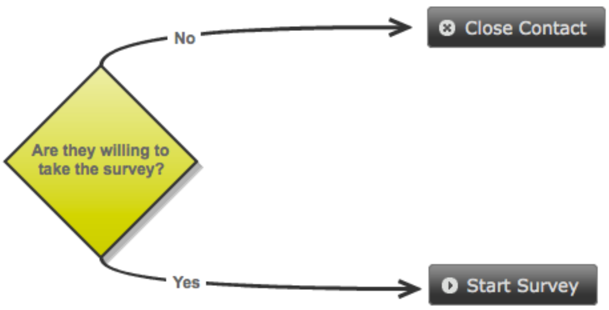
This process is handled by WSC in a straightforward manner. The key steps to the process are:

1. The interviewer commences the CATI process by clicking the **Next Contact** button.

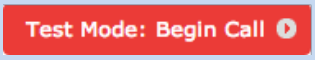
2. The details of the contact are shown onscreen – including their telephone number. At this point the number can be called in one of a number of ways depending on the setup of the system:
    a. The number can be dialed manually on a phone; or
    b. If integrated with Skype, clicking on the number will begin the call; or
    c. If an automated dialer is being used, the dialing process would commence immediately

3. The introduction to read to the respondent is shown on this screen as well, so that it can be immediately read.

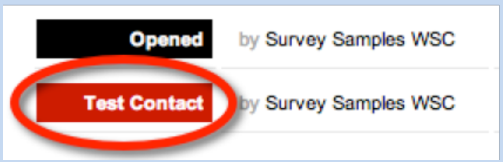
   It is at this point that one of 2 things will happen:



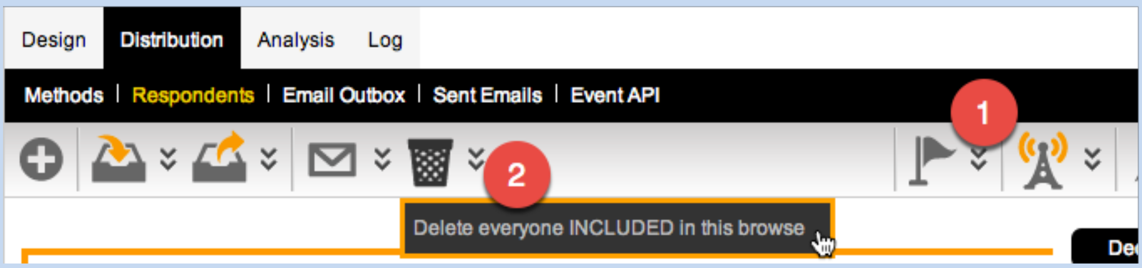
There are times when you want to simply test the CATI process, and not make a real call. If a job has been configured to allow test responses (this is a setting on the CATI distribution for the survey), a button can be pressed to begin a **Test Call**.



Choosing test mode will create a duplicate of the current contact, flag them as a test contact, and allow the interviewer to begin the call process.

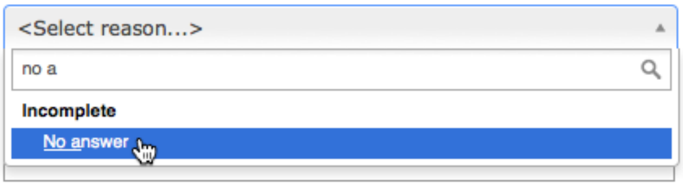


Test respondents behave exactly like real respondents – they appear in reports, affect quotas etc. – because the only way to accurately test the system is to run the full standard process. The key difference with these respondents is they can be found and removed easily by an administrator when the testing is finished. In the respondents browse, filter test respondents (1) then choose to delete them all (2).

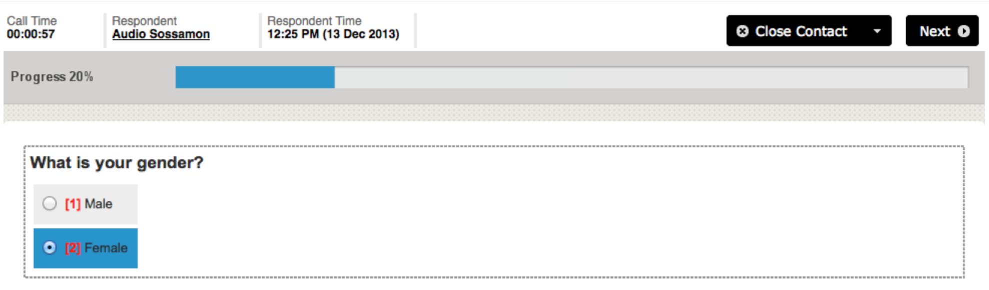


4. The next step depends upon the choice made in Step 3.

   a. If **Close Contact** is chosen, the interviewer will be able to choose from the list of predefined reasons for the ending of the call.

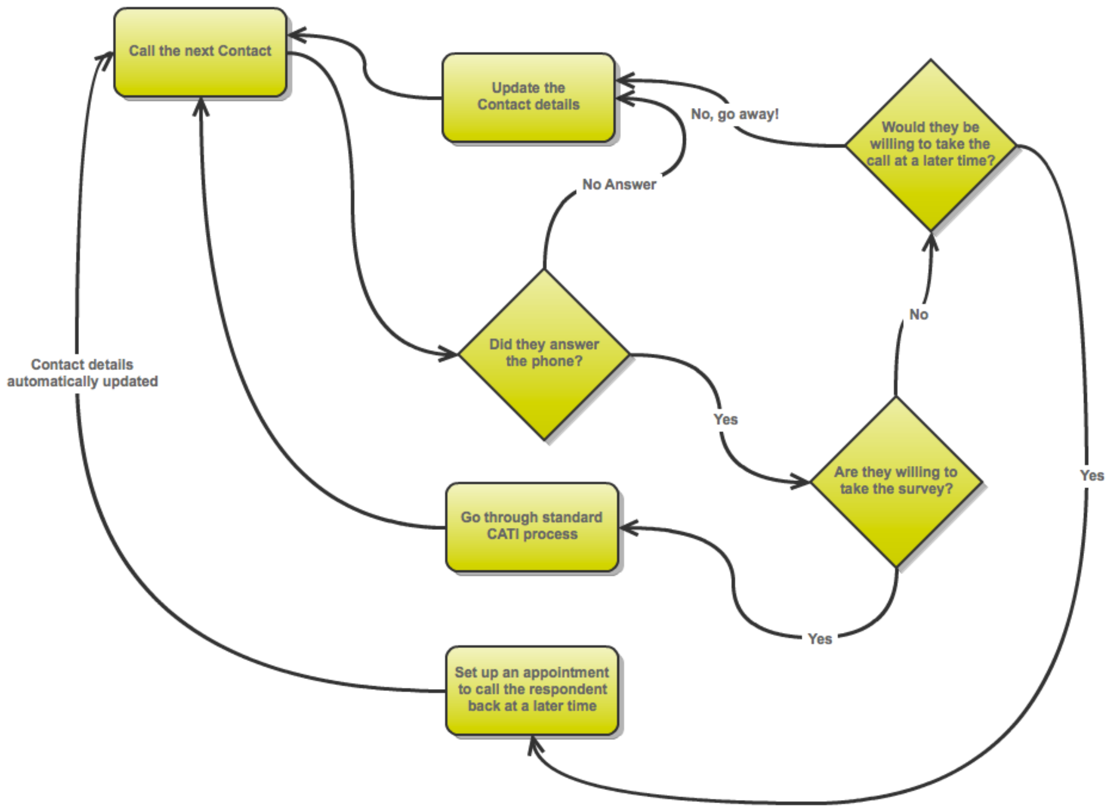


   b. If **Start Survey** is chosen, the survey will begin and can be completed for the respondent.



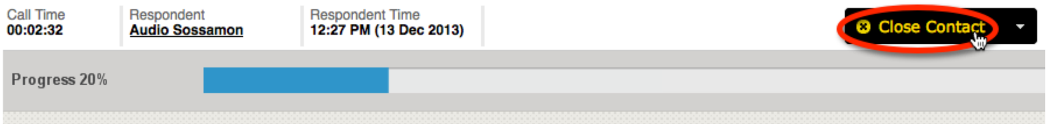
Making an Appointment

One variation of the standard CATI process is the need to call people back at a later time. This is achieved by making an appointment with details of the callback. The CATI workflow would be something like the following:

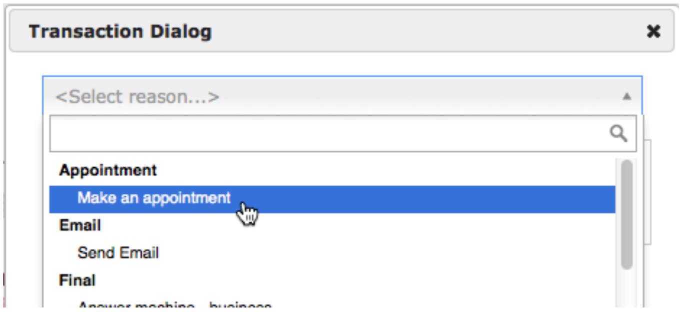


Setting up an appointment can be done through the following steps:

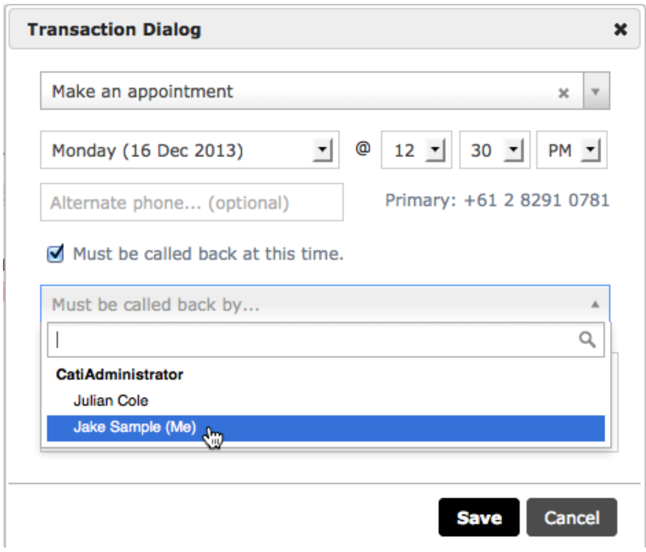
1. When the respondent indicates the can not take the call, the **Close Contact** button is pressed.



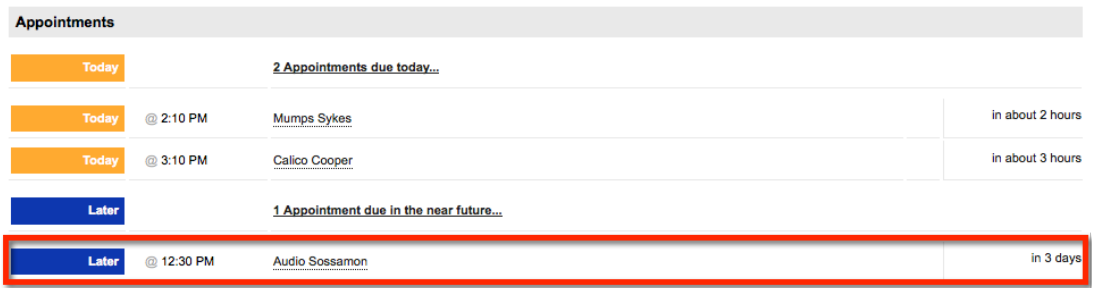
2. If the respondent indicates that they are happy to take the call at a later stage, the close status type for the call can be set to an appointment.



3. The details of the appointment can be set, including the time and date of the appointment, and optionally an interviewer who is the preferred person to do the callback.

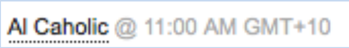


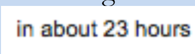
4. The call is closed, and the appointment will show on the list of appointments for the job.



Appointments are managed automatically by the system to provide the best possible outcomes for the call. Key aspects of the appointment system are:

1. Outstanding appointments are shown within the main CATI window, with clear details about:
    a. When the appointment is for
    

    b. Who the appointment is with (including the appointment time in their time zone, if it is different to the interviewer's time zone)
    

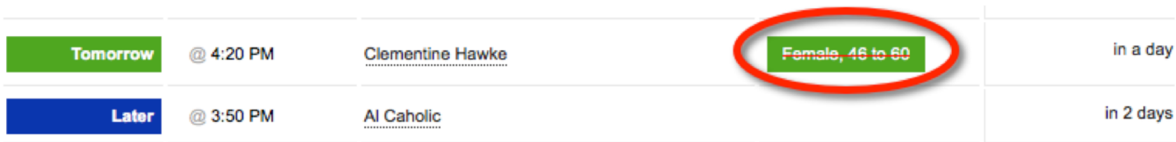
    c. How long before the appointment is due
    

2. Appointments that are soft (e.g. "call around 10am") are given to an appropriate interviewer within a time period from 15 minutes before the set time to 15 minutes after.

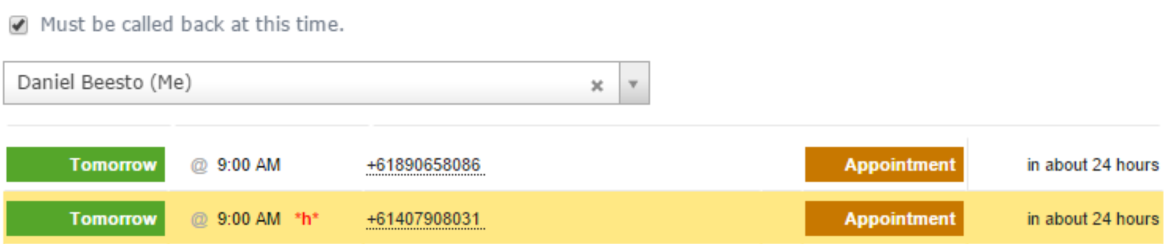
3. Appointments that are "hard" (e.g. "call me at 10am") are given to an appropriate interviewer 5 minutes before the call time.

4. Appointments that are for a specific interviewer are highlighted for that interviewer when the call is within the next 30 minutes.

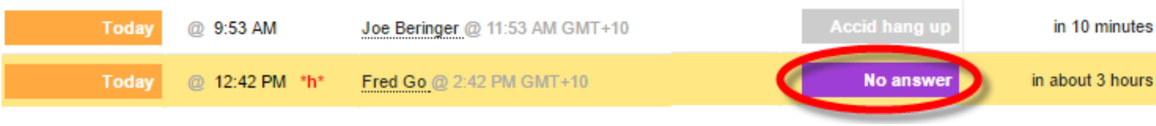
Sometimes, by the time an appointment is due, the person who needs to be called for the appointment is in a quota that is now full. What you do about such a person may differ from one case to the next. WSC still shows the appointment, and will process it as normal, however it is made clear that the person is in a quota that is now full. This makes it easy to see appointments with people in full quotas, so the appropriate action can be taken.



Hard appointments are identified in the main screen by a little red *h* and a highlighted row. These appointments have had an interviewer assigned as a callback and/or the check box "must be called back at this time" was selected.

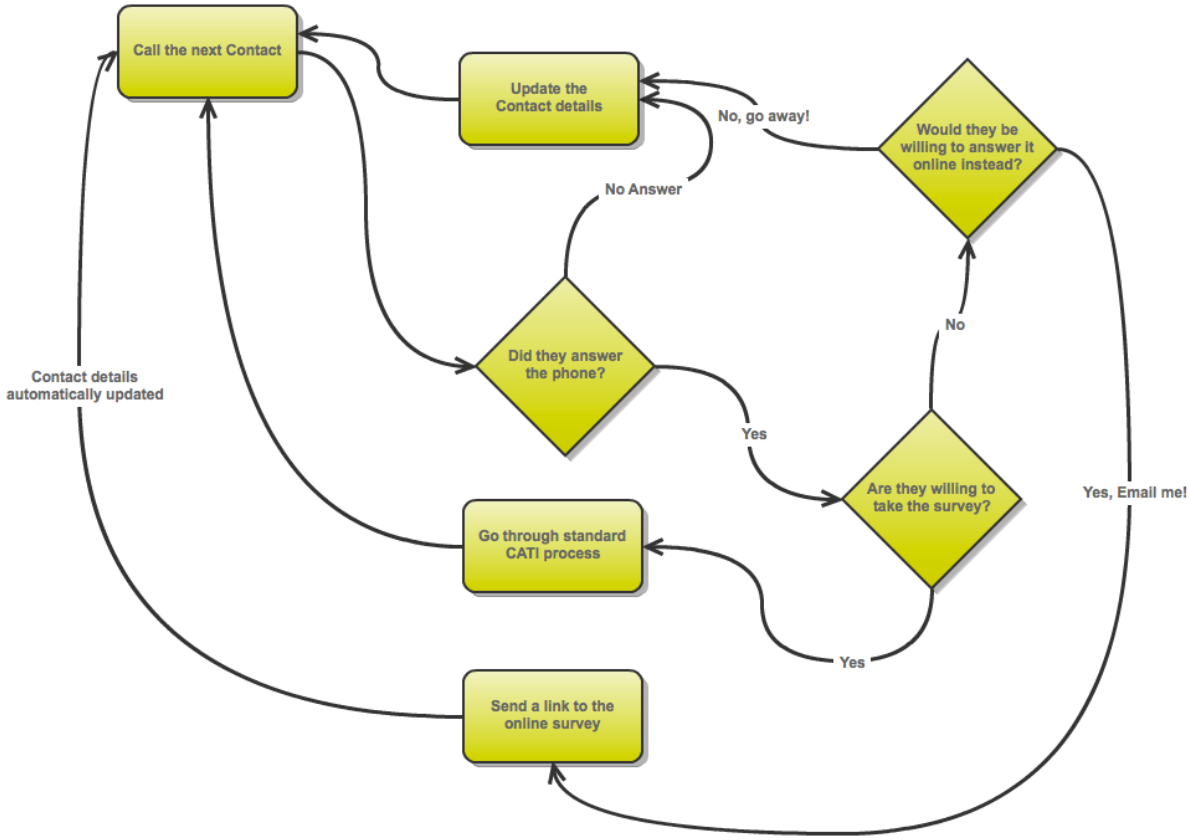


The appointment row on the front page also includes the most recent status applied to the respondent, so interviewers can make a judgement on whether to call based on this information.



Sending a Link to a Survey via Email

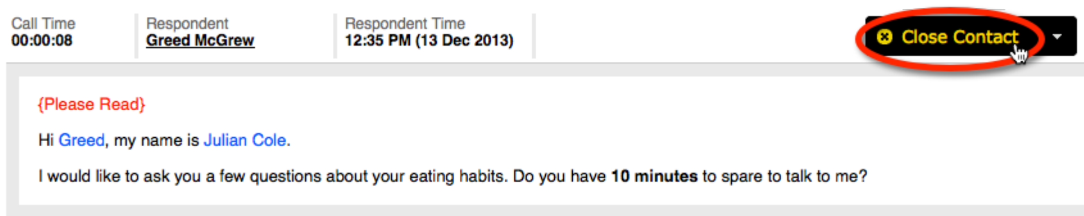
Respondents who do not have time to talk on the telephone can be offered an option to complete the survey online. Let's consider the following workflow:



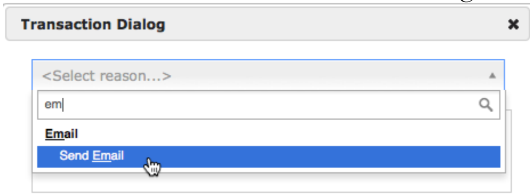
The key aspect of this workflow is the sending of the survey via Email, rather than doing the CATI process over the phone.

The steps for this process are as follows:

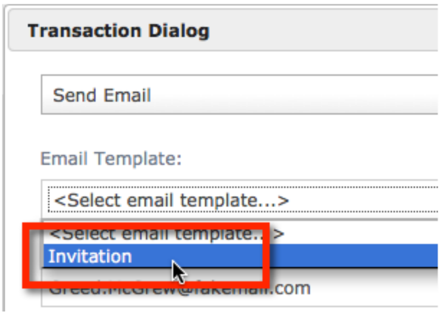
1. After reading the introduction to the survey, an interviewer is told by the respondent they do not want to do the survey.
2. The interviewer closes the CATI process.



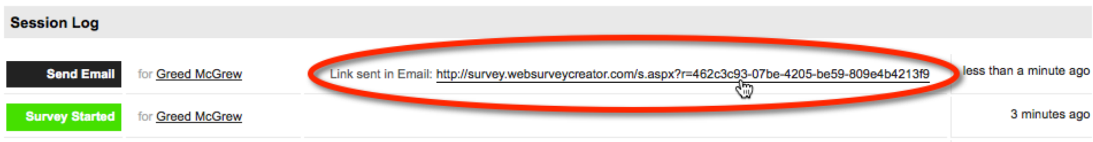
3. Choose “Email” as the reason for closing the call.



4. Choose an Email template to send (from the templates an admin would have set up previously)



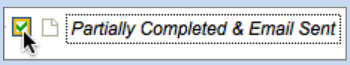
5. The invitation will be sent automatically, and the link that has been sent to the respondent is shown in the session log.



6. The interviewer can then move onto the next contact.

The Email status is similar to other statuses, in that a “delay” can be set on it before the respondent will appear on the call list again. This would make it possible, for example, to say not to call back for two days. After 2 days, the respondent would be on the call list again only if there response is still not completed.

The Introduction Text for the interviewer to read can be changed specifically when someone sent an Email is called again if you want to start with something like “You were recently sent an Email…” etc. This is achieved by only including a particular paragraph for people sent an Email.



How does CATI find the “Next Contact”?

One of the most important aspects of the CATI system is how it manages people to call. For a CATI interviewer, the process is very simple – pressing the **Next Contact** button will give them the most appropriate person to call. This begs the question:

Who is the most appropriate person to call?

There are two aspects to the process of determining whom to call next:

2. From the pool of "valid" respondents, there needs to be some ordering applied so that the *most appropriate* person is served to an interviewer next

Getting the pool of "Valid" Respondents to Call

```
Valid Pool of Respondents =      Total Pool of Respondents
                               - People who have completed
                               - People who are completing online
                               - People in full quotas
                               - People who are closed (dead, wrong number etc.)
                               - People who were called recently
                               - People who have been called too much
                               - People awaiting an appointment
                               - People outside time zone rule limits (e.g. After hours)
```

Note that any filtering a CATI interviewer is using based upon respondent tags, quotas or time zones further restricts the pool of respondents.

Total Pool of Respondents

The total pool of respondents available within a CATI job is made up of every person that has ever been added to the job.

People who have completed

The respondents that have completed responses for the job – either completed through the Web, or over the telephone with a CATI interviewer.

People who are completing online

Whenever a respondent clicks on a link to complete the survey on the Web a CATI status of **Link Clicked** is added to their CATI transaction history. This status by default has a delay of 1 day, meaning that they will not be included in the possible pool of respondents to call for 1 day after the click. This gives them an opportunity to complete their response (and not get interrupted by an interviewer trying to call them).

People in full quotas

Got enough men for a particular job? The quota would be full, and all men would be excluded from future calls. This assumes, of course, that sufficient data has been imported about respondents to know that they are men before even calling them.

People who are closed

There are a serious of "final" statuses a respondent can have, including that they are dead, there is a language issue, or there is a problem with the telephone number (wrong number, business fax line etc.) Respondents with a final status are never included in future calls.

People who were called recently

There are many reasons that a respondent may have been called recently, and no response was completed. For example, the call may have gone to an answering machine, or there may simply have been no answer.

All statuses that relate to "non-final" non-contact have a delay period. So, for example, after there has been no answer, there could be a delay of 1 hour before the person will be available again in the general pool of people to call.

People who have been called too much

There are three general types of mechanism to avoid overcalling people:

Too many calls overall	This is an absolute limit of the number of attempts to make on contacting a person (e.g. never try and contact a person more than 10 times). Once the limit is reached, a person should not be contacted again.
Too many calls overall for a particular status	This is where a person has been called too much with the same result (e.g. No Answer) and should not be called again. For example, after 5 no answers, you may set the rules to change the status of a respondent to the final status of **Contact Limit Reached**. These people will never be included in the pool of respondents to call again.
Too many calls within a period of time	An example of this type of restriction is where you only want a person called a maximum of 2 times in a particular shift. Once the limit is reached, the next chance to call a person will be when a new time zone period begins. For example, you could separate Monday, Tuesday, etc. as separate time zone periods, and limit the number of calls to 2 in each. Once 2 calls are made on Monday, a person will be excluded from the pool of people to call until Tuesday – when there will be another 2 opportunities to try and speak to them.

People Awaiting Appointments

If a person has an appointment attached to them, they will not be in the general pool of respondents until their appointment is due. Once they are in the pool, they will be the top person to call – so **Next Contact** will open them before anyone else in the pool.

There are two general rules that have to be considered for appointments:

1. Is the appointment at a specific time, or "around" a time (i.e. the respondent is more flexible about when they are called)
2. Does a specific interviewer need to call back, or can anyone in the job call back?

The basic rules that are used for appointments are:

- People with appointments **"around" a time** will become available in the pool of respondents **15 minutes** before the appointment time
- People with appointments at a **specific time** will become available in the pool of respondents **5 minutes** before the appointment time
- If an appointment is for a particular interviewer, they will be given the first opportunity to take the appointment, however after a period of time the appointment is given to the general pool of interviewers. When an appointment is for a particular interviewer:
    - People with appointments **"around" a time** will become available in the pool of respondents for all interviewers from **15 minutes** after the appointment time
    - People with appointments at a **specific time** will become available in the pool of respondents for all interviewers from **5 minutes** after the appointment time

The matrix of these possibilities, and how they are dealt with in the system, is shown below.

	Specific Time	**Rough Time**
Specific Interviewer	Appointment available from 5 minutes before appointment time to the interviewer only. Failure to take call will open the appointment to all interviewers 5 minutes after the appointment time.	Appointment available from 15 minutes before appointment time to the interviewer only. Failure to take call will open the appointment to all interviewers 15 minutes after the appointment time.
Any Interviewer	Appointment available from 5 minutes before appointment time to all interviewers.	Appointment available from 15 minutes before appointment time to all interviewers.

People outside time zone rule limits

Time zone rules indicate what times are valid for people within that time zone. Generally this is something simple, like indicating they can only be called between 9am and 5pm.

Ordering the pool of "Valid" Respondents

Once the pool of valid respondents has been determined, the only thing left is to determine the order that they are provided to interviewers. This order takes into account how full quotas are, together with a random element to ensure there is some mix quotas (not just the least complete quota) in the list of respondents to call.

Mixed Mode Appendix: Listing of Time Zone Codes

When setting up import data with the appropriate Time Zone, you must use a valid Time Zone code. Here is a complete list of all accepted time zone codes.

Country	Region	Code
Afghanistan	Afghanistan	AF
Åland Islands	Åland Islands	AX
Albania	Albania	AL
Algeria	Algeria	DZ
American Samoa	American Samoa	AS
Andorra	Andorra	AD
Angola	Angola	AO
Anguilla	Anguilla	AI
Antigua and Barbuda	Antigua and Barbuda	AG
Argentina	Buenos Aires	AR-BA
Argentina	Catamarca	AR-CT
Argentina	Chaco	AR-CC
Argentina	Chubut	AR-CH
Argentina	Ciudad de Buenos Aires	AR-DF
Argentina	Córdoba	AR-CB
Argentina	Corrientes	AR-CN
Argentina	Entre Rios	AR-ER
Argentina	Formosa	AR-FM
Argentina	Jujuy	AR-JY
Argentina	La Pampa	AR-LP
Argentina	La Rioja	AR-LR
Argentina	Mendoza	AR-MZ
Argentina	Misiones	AR-MN
Argentina	Neuquén	AR-NQ
Argentina	Rio Negro	AR-RN
Argentina	Salta	AR-SA
Argentina	San Juan	AR-SJ
Argentina	San Luis	AR-SL
Argentina	Santa Cruz	AR-SC
Argentina	Santa Fe	AR-SF
Argentina	Santiago del Estero	AR-SE
Argentina	Tierra del Fuego	AR-TF
Argentina	Tucumán	AR-TM
Armenia	Armenia	AM
Aruba	Aruba	AW
Australia	Australian Capital Territory	AU-ACT
Australia	Broken Hill	AU3

Country	Region	Code
Australia	Lord Howe Island	AU1
Australia	New South Wales	AU-NSW
Australia	Northern Territory	AU-NT
Australia	Queensland	AU-QLD
Australia	South Australia	AU-SA
Australia	Tasmania	AU-TAS
Australia	Victoria	AU-VIC
Australia	Western Australia	AU-WA
Australia	Western Australia (Exception)	AU-WA1
Austria	Austria	AT
Azerbaijan	Azerbaijan	AZ
Bahamas	Bahamas	BS
Bahrain	Bahrain	BH
Bangladesh	Bangladesh	BD
Barbados	Barbados	BB
Belarus	Belarus	BY
Belgium	Belgium	BE
Belize	Belize	BZ
Benin	Benin	BJ
Bermuda	Bermuda	BM
Bhutan	Bhutan	BT
Bolivia	Bolivia	BO
Bonaire, Sint Eustatius and Saba	Bonaire, Sint Eustatius and Saba	BQ
Bosnia and Herzegovina	Bosnia and Herzegovina	BA
Botswana	Botswana	BW
Brazil	Acre	BR-AC
Brazil	Alagoas	BR-AL
Brazil	Amapa	BR-AP
Brazil	Amazonas	BR-AM
Brazil	Bahia	BR-BA
Brazil	Ceara	BR-CE
Brazil	Distrito Federal	BR-DF
Brazil	Espirto Santo	BR-ES
Brazil	Fernando de Noronha	BR-FN
Brazil	Goias	BR-GO
Brazil	Maranhao	BR-MA
Brazil	Mato Grosso	BR-MT
Brazil	Mato Grosso (Araguaia region)	BR-MT1
Brazil	Mato Grosso do Sul	BR-MS
Brazil	Minas Gerais	BR-MG
Brazil	Para (eastern)	BR-PA1
Brazil	Para (western)	BR-PA2

Country	Region	Code
Brazil	Paraiba	BR-PB
Brazil	Parana	BR-PR
Brazil	Pernambuco	BR-PE
Brazil	Piaui	BR-PI
Brazil	Rio de Janeiro	BR-RJ
Brazil	Rio Grande do Norte	BR-RN
Brazil	Rio Grande do Sul	BR-RS
Brazil	Rondonia	BR-RO
Brazil	Roraima	BR-RR
Brazil	Santa Catarina	BR-SC
Brazil	Sao Paulo	BR-SP
Brazil	Sergipe	BR-SE
Brazil	Tocantins	BR-TO
Brunei Darussalam	Brunei Darussalam	BN
Bulgaria	Bulgaria	BG
Burkina Faso	Burkina Faso	BF
Burundi	Burundi	BI
Cambodia	Cambodia	KH
Cameroon	Cameroon	CM
Canada	Alberta	CA-AB
Canada	British Columbia	CA-BC
Canada	British Columbia (exception 1)	CA-BC1
Canada	British Columbia (exception 2)	CA-BC2
Canada	Labrador	CA2
Canada	Labrador (exception)	CA2A
Canada	Manitoba	CA-MB
Canada	New Brunswick	CA-NB
Canada	Newfoundland	CA-NF
Canada	Northwest Territories	CA-NT
Canada	Nova Scotia	CA-NS
Canada	Nunavut - Southampton Island	CA-NT2A
Canada	Nunavut (Central)	CA-NT2B
Canada	Nunavut (Eastern)	CA-NT2
Canada	Nunavut (Mountain)	CA-NT2C
Canada	Ontario	CA-ON
Canada	Ontario (western)	CA-ON1
Canada	Prince Edward Island	CA-PE
Canada	Quebec	CA-QC
Canada	Quebec (far east)	CA-QC1
Canada	Saskatchewan	CA-SK
Canada	Saskatchewan (exceptions - east)	CA-SK2
Canada	Saskatchewan (exceptions - west)	CA-SK1

Country	Region	Code
Canada	Yukon	CA-YT
Cape Verde	Cape Verde	CV
Cayman Islands	Cayman Islands	KY
Central African Republic	Central African Republic	CF
Chad	Chad	TD
Chile	Chile	CL
Chile - Easter Island	Chile - Easter Island	CL2
China	China	CN
Christmas Island (Indian Ocean)	Christmas Island (Indian Ocean)	CX
Cocos (Keeling) Islands	Cocos (Keeling) Islands	CC
Colombia	Colombia	CO
Comoros	Comoros	KM
Congo	Congo	CG
Congo, Democratic Republic of	(Eastern)	CD2
Congo, Democratic Republic of	(Western)	CD
Cook Islands	Cook Islands	CK
Costa Rica	Costa Rica	CR
Cote D'Ivoire	Cote D'Ivoire	CI
Croatia	Croatia	HR
Cuba	Cuba	CU
Curaçao	Curaçao	CW
Cyprus	Cyprus	CY
Czech Republic	Czech Republic	CZ
Denmark	Denmark	DK
Djibouti	Djibouti	DJ
Dominica	Dominica	DM
Dominican Republic	Dominican Republic	DO
Ecuador	Ecuador	EC
Ecuador - Galapagos Islands	Ecuador - Galapagos Islands	EC2
Egypt	Egypt	EG
El Salvador	El Salvador	SV
Equatorial Guinea	Equatorial Guinea	GQ
Eritrea	Eritrea	ER
Estonia	Estonia	EE
Ethiopia	Ethiopia	ET
Falkland Islands (Malvinas)	Falkland Islands (Malvinas)	FK
Faroe Islands	Faroe Islands	FO
Fiji	Fiji	FJ
Finland	Finland	FI
France	France	FR
French Guiana	French Guiana	GF
French Polynesia	Austral Islands	PF2A

Country	Region	Code
French Polynesia	Gambier Islands	PF3
French Polynesia	Marquesas Islands	PF1
French Polynesia	Society Islands (including Tahiti)	PF
French Polynesia	Tuamotu Archipelago	PF2B
Gabon	Gabon	GA
Gambia	Gambia	GM
Georgia	Georgia	GE
Germany	Germany	DE
Ghana	Ghana	GH
Gibraltar	Gibraltar	GI
Greece	Greece	GR
Greenland	Danmarkshavn	GL4
Greenland	Greenland	GL
Greenland	Ittoqqortoormiit	GL3
Greenland	Pituffik	GL2
Grenada	Grenada	GD
Guadeloupe	Guadeloupe	GP
Guam	Guam	GU
Guatemala	Guatemala	GT
Guernsey	Guernsey	GG
Guinea	Guinea	GN
Guinea-Bissau	Guinea-Bissau	GW
Guyana	Guyana	GY
Haiti	Haiti	HT
Holy See	Holy See	VA
Honduras	Honduras	HN
Hong Kong	Hong Kong	HK
Hungary	Hungary	HU
Iceland	Iceland	IS
India	India	IN
Indonesia	(Central)	ID2
Indonesia	(Eastern)	ID3
Indonesia	(Western)	ID
Iran, Islamic Republic of	Iran, Islamic Republic of	IR
Iraq	Iraq	IQ
Ireland	Ireland	IE
Isle of Man	Isle of Man	IM
Israel	Israel	IL
Italy	Italy	IT
Jamaica	Jamaica	JM
Japan	Japan	JP
Jersey	Jersey	JE

Country	Region	Code
Johnston Atoll (U.S.)	Johnston Atoll (U.S.)	UM1
Jordan	Jordan	JO
Kazakhstan	(Eastern)	KZ
Kazakhstan	(Western)	KZ1
Kenya	Kenya	KE
Kiribati	Gilbert Islands	KI
Kiribati	Line Islands	KI2
Kiribati	Phoenix Islands	KI3
Korea, Democratic People's Republic of	Korea, Democratic People's Republic of	KP
Korea, Republic of	Korea, Republic of	KR
Kuwait	Kuwait	KW
Kyrgyzstan	Kyrgyzstan	KG
Lao People's Democratic Republic	Lao People's Democratic Republic	LA
Latvia	Latvia	LV
Lebanon	Lebanon	LB
Lesotho	Lesotho	LS
Liberia	Liberia	LR
Libya	Libya	LY
Liechtenstein	Liechtenstein	LI
Lithuania	Lithuania	LT
Luxembourg	Luxembourg	LU
Macao	Macao	MO
Macedonia, The Former Yugoslav Republic Of	Macedonia, The Former Yugoslav Republic Of	MK
Madagascar	Madagascar	MG
Malawi	Malawi	MW
Malaysia	Malaysia	MY
Maldives	Maldives	MV
Mali	Mali	ML
Malta	Malta	MT
Marshall Islands	Marshall Islands	MH
Martinique	Martinique	MQ
Mauritania	Mauritania	MR
Mauritius	Mauritius	MU
Mayotte	Mayotte	YT
Mexico	Aguascalientes	MX-AGU
Mexico	Baja California	MX-BCN
Mexico	Baja California (Border Region)	MX-BCN1
Mexico	Baja California Sur	MX-BCS
Mexico	Campeche	MX-CAM
Mexico	Chiapas	MX-CHP

Country	Region	Code
Mexico	Chihuahua	MX-CHH
Mexico	Chihuahua (Border Region)	MX-CHH1
Mexico	Coahuila	MX-COA
Mexico	Coahuila (Border Region)	MX-COA1
Mexico	Colima	MX-COL
Mexico	Distrito Federal	MX-DIF
Mexico	Durango	MX-DUR
Mexico	Guanajuato	MX-GUA
Mexico	Guerrero	MX-GRO
Mexico	Hidalgo	MX-HID
Mexico	Jalisco	MX-JAL
Mexico	Mexico State	MX-MEX
Mexico	Michoacán	MX-MIC
Mexico	Morelos	MX-MOR
Mexico	Nayarit	MX-NAY
Mexico	Nayarit (Exception)	MX-NAY1
Mexico	Nuevo León	MX-NLE
Mexico	Nuevo León (Border Region)	MX-NLE1
Mexico	Oaxaca	MX-OAX
Mexico	Puebla	MX-PUE
Mexico	Querétaro	MX-QUE
Mexico	Quintana Roo	MX-ROO
Mexico	San Luis Potosí	MX-SLP
Mexico	Sinaloa	MX-SIN
Mexico	Sonora	MX-SON
Mexico	Tabasco	MX-TAB
Mexico	Tamaulipas	MX-TAM
Mexico	Tamaulipas (Border Region)	MX-TAM1
Mexico	Tlaxcala	MX-TLA
Mexico	Veracruz	MX-VER
Mexico	Yucatan	MX-YUC
Mexico	Zacatecas	MX-ZAC
Micronesia, Federated States Of	Kosrae, Pohnpei	FM
Micronesia, Federated States Of	Yap, Chuuk	FM1
Midway Islands (U.S.)	Midway Islands (U.S.)	UM2
Moldova, Republic of	Moldova, Republic of	MD
Monaco	Monaco	MC
Mongolia	(Central and Eastern)	MN
Mongolia	(Western)	MN1
Montenegro	Montenegro	ME
Montserrat	Montserrat	MS
Morocco	Morocco	MA

Country	Region	Code
Mozambique	Mozambique	MZ
Myanmar	Myanmar	MM
Namibia	Namibia	NA
Nauru	Nauru	NR
Nepal	Nepal	NP
Netherlands	Netherlands	NL
New Caledonia	New Caledonia	NC
New Zealand	New Zealand	NZ
New Zealand - Chatham Islands	New Zealand - Chatham Islands	NZ2
Nicaragua	Nicaragua	NI
Niger	Niger	NE
Nigeria	Nigeria	NG
Niue	Niue	NU
Norfolk Island	Norfolk Island	NF
Northern Mariana Islands	Northern Mariana Islands	MP
Norway	Norway	NO
Oman	Oman	OM
Pakistan	Pakistan	PK
Palau	Palau	PW
Palestinian Territory	Gaza Strip	PS1
Palestinian Territory	West Bank	PS
Panama	Panama	PA
Papua New Guinea	Papua New Guinea	PG
Paraguay	Paraguay	PY
Peru	Peru	PE
Philippines	Philippines	PH
Pitcairn	Pitcairn	PN
Poland	Poland	PL
Portugal	Azores	PT2
Portugal	Madeira Islands	PT1
Portugal	Portugal	PT
Puerto Rico	Puerto Rico	PR
Qatar	Qatar	QA
Reunion	Reunion	RE
Romania	Romania	RO
Russia	Adygea	RU-AD
Russia	Altai Republic	RU-AL
Russia	Altaskiy Kray	RU-ALT
Russia	Amur	RU-AMU
Russia	Arkhangel'	RU-ARK
Russia	Astrakhan'	RU-AST
Russia	Bashkortostan	RU-BA

Country	Region	Code
Russia	Belgorod	RU-BEL
Russia	Bryansk	RU-BRY
Russia	Buryatia	RU-BU
Russia	Chechnya	RU-CE
Russia	Chelyabinsk	RU-CHE
Russia	Chukot	RU-CHU
Russia	Chuvashia	RU-CU
Russia	Dagestan	RU-DA
Russia	Ingushetia	RU-IN
Russia	Irkutsk	RU-IRK
Russia	Ivanovo	RU-IVA
Russia	Jewish Autonomous Oblast'	RU-YEV
Russia	Kabardino-Balkaria	RU-KB
Russia	Kaliningrad	RU-KGD
Russia	Kalmykia	RU-KL
Russia	Kaluga	RU-KLU
Russia	Kamchatka	RU-KAM
Russia	Karachay-Cherkessia	RU-KC
Russia	Karelia	RU-KR
Russia	Kemerovo	RU-KEM
Russia	Khabarovsk	RU-KHA
Russia	Khakassia	RU-KK
Russia	Khanty-Mansi	RU-KHM
Russia	Kirov	RU-KIR
Russia	Komi	RU-KO
Russia	Kostroma	RU-KOS
Russia	Krasnodar	RU-KDA
Russia	Krasnoyarsk	RU-KYA
Russia	Kurgan	RU-KGN
Russia	Kursk	RU-KRS
Russia	Leningradskaya Oblast'	RU-LEN
Russia	Lipetsk	RU-LIP
Russia	Magadan	RU-MAG
Russia	Mari El	RU-ME
Russia	Mordovia	RU-MO
Russia	Moscow City	RU-MOW
Russia	Moskva	RU-MOS
Russia	Murmansk	RU-MUR
Russia	Nenets	RU-NEN
Russia	Nizhniy Novgorod	RU-NIZ
Russia	North Ossetia-Alania	RU-SE
Russia	Novgorod	RU-NGR

Country	Region	Code
Russia	Novosibirsk	RU-NVS
Russia	Omsk	RU-OMS
Russia	Orel	RU-ORL
Russia	Orenburg	RU-ORE
Russia	Penza	RU-PNZ
Russia	Perm	RU-PER
Russia	Primorskiy	RU-PRI
Russia	Pskov	RU-PSK
Russia	Rostov	RU-ROS
Russia	Ryazan'	RU-RYA
Russia	Sakha (Central)	RU-SA2
Russia	Sakha (Eastern)	RU-SA3
Russia	Sakha (Western)	RU-SA
Russia	Sakhalin	RU-SAK
Russia	Sakhalin (Kuril Islands)	RU-SAK2
Russia	Samara	RU-SAM
Russia	Saratov	RU-SAR
Russia	Smolensk	RU-SMO
Russia	St. Petersburg City	RU-SPE
Russia	Stavropol	RU-STA
Russia	Sverdlovsk	RU-SVE
Russia	Tambov	RU-TAM
Russia	Tatarstan	RU-TA
Russia	Tomsk	RU-TOM
Russia	Tula	RU-TUL
Russia	Tuva	RU-TY
Russia	Tver'	RU-TVE
Russia	Tyumen'	RU-TYU
Russia	Udmurtia	RU-UD
Russia	Ul'yanovsk	RU-ULY
Russia	Vladimir	RU-VLA
Russia	Volgograd	RU-VGG
Russia	Vologda	RU-VLG
Russia	Voronezh	RU-VOR
Russia	Yamalo-Nenets	RU-YAN
Russia	Yaroslavl'	RU-YAR
Russia	Zabaykalsky	RU-ZAB
Rwanda	Rwanda	RW
Saint Barthelemy	Saint Barthelemy	BL
Saint Helena, Ascension and Tristan da Cunha	Saint Helena, Ascension and Tristan da Cunha	SH
Saint Kitts and Nevis	Saint Kitts and Nevis	KN

Country	Region	Code
Saint Lucia	Saint Lucia	LC
Saint Martin	Saint Martin	MF
Saint Pierre and Miquelon	Saint Pierre and Miquelon	PM
Saint Vincent and The Grenadines	Saint Vincent and The Grenadines	VC
Samoa	Samoa	WS
San Marino	San Marino	SM
Sao Tome and Principe	Sao Tome and Principe	ST
Saudi Arabia	Saudi Arabia	SA
Senegal	Senegal	SN
Serbia	Serbia	RS
Seychelles	Seychelles	SC
Sierra Leone	Sierra Leone	SL
Singapore	Singapore	SG
Sint Maarten (Dutch part)	Sint Maarten (Dutch part)	SX
Slovakia	Slovakia	SK
Slovenia	Slovenia	SI
Solomon Islands	Solomon Islands	SB
Somalia	Somalia	SO
South Africa	South Africa	ZA
South Sudan, Republic of	South Sudan, Republic of	SS
Spain	Canary Islands	ES2
Spain	Mainland, Baleares, Melilla, Ceuta	ES
Sri Lanka	Sri Lanka	LK
Sudan	Sudan	SD
Suriname	Suriname	SR
Svalbard and Jan Mayen	Svalbard and Jan Mayen	SJ
Swaziland	Swaziland	SZ
Sweden	Sweden	SE
Switzerland	Switzerland	CH
Syrian Arab Republic	Syrian Arab Republic	SY
Taiwan	Taiwan	TW
Tajikistan	Tajikistan	TJ
Tanzania, United Republic of	Tanzania, United Republic of	TZ
Thailand	Thailand	TH
Timor-Leste	Timor-Leste	TL
Togo	Togo	TG
Tokelau	Tokelau	TK
Tonga	Tonga	TO
Trinidad and Tobago	Trinidad and Tobago	TT
Tunisia	Tunisia	TN
Turkey	Turkey	TR
Turkmenistan	Turkmenistan	TM

Country	Region	Code
Turks and Caicos Islands	Turks and Caicos Islands	TC
Tuvalu	Tuvalu	TV
Uganda	Uganda	UG
Ukraine	Ukraine	UA
United Arab Emirates	United Arab Emirates	AE
United Kingdom	United Kingdom	GB
United States	Alabama	US-AL
United States	Alaska	US-AK
United States	Alaska (Aleutian Islands)	US-AK1
United States	Arizona	US-AZ
United States	Arizona (Navajo Reservation)	US-AZ1
United States	Arkansas	US-AR
United States	California	US-CA
United States	Colorado	US-CO
United States	Connecticut	US-CT
United States	Delaware	US-DE
United States	District of Columbia	US-DC
United States	Florida	US-FL
United States	Florida (far west)	US-FL1
United States	Georgia	US-GA
United States	Hawaii	US-HI
United States	Idaho (northern)	US-ID1
United States	Idaho (southern)	US-ID
United States	Illinois	US-IL
United States	Indiana	US-IN
United States	Indiana (far west)	US-IN1
United States	Iowa	US-IA
United States	Kansas	US-KS
United States	Kansas (exception)	US-KS1
United States	Kentucky (eastern)	US-KY
United States	Kentucky (western)	US-KY1
United States	Louisiana	US-LA
United States	Maine	US-ME
United States	Maryland	US-MD
United States	Massachusetts	US-MA
United States	Michigan	US-MI
United States	Michigan (exception)	US-MI1
United States	Minnesota	US-MN
United States	Mississippi	US-MS
United States	Missouri	US-MO
United States	Montana	US-MT
United States	Nebraska	US-NE

Country	Region	Code
United States	Nebraska (western)	US-NE1
United States	Nevada	US-NV
United States	Nevada (exception)	US-NV1
United States	New Hampshire	US-NH
United States	New Jersey	US-NJ
United States	New Mexico	US-NM
United States	New York	US-NY
United States	North Carolina	US-NC
United States	North Dakota	US-ND
United States	North Dakota (western)	US-ND1
United States	Ohio	US-OH
United States	Oklahoma	US-OK
United States	Oregon	US-OR
United States	Oregon (exception)	US-OR1
United States	Pennsylvania	US-PA
United States	Rhode Island	US-RI
United States	South Carolina	US-SC
United States	South Dakota (eastern)	US-SD
United States	South Dakota (western)	US-SD1
United States	Tennessee (eastern)	US-TN1
United States	Tennessee (western)	US-TN
United States	Texas	US-TX
United States	Texas (far west)	US-TX1
United States	Utah	US-UT
United States	Vermont	US-VT
United States	Virginia	US-VA
United States	Washington	US-WA
United States	West Virginia	US-WV
United States	Wisconsin	US-WI
United States	Wyoming	US-WY
Uruguay	Uruguay	UY
Uzbekistan	Uzbekistan	UZ
Vanuatu	Vanuatu	VU
Venezuela	Venezuela	VE
Viet Nam	Viet Nam	VN
Virgin Islands (British)	Virgin Islands (British)	VG
Virgin Islands (U.S.)	Virgin Islands (U.S.)	VI
Wake Island (U.S.)	Wake Island (U.S.)	UM3
Wallis and Futuna	Wallis and Futuna	WF
Western Sahara	Western Sahara	EH
Yemen	Yemen	YE
Zambia	Zambia	ZM

Country	Region	Code
Zimbabwe	Zimbabwe	ZW