

PART D - NHIS

CHAPTER 1. INTRODUCTION TO COMPUTER-ASSISTED INTERVIEWING

	<u>Page</u>
A. Advantages for FRs	D1-1
B. Questions About Skills and Experience	D1-1
C. Job Overview	D1-2
D. A Note On FR Evaluation	D1-3

PART D - NHIS

CHAPTER 1. INTRODUCTION TO COMPUTER-ASSISTED INTERVIEWING

A. Advantages for FRs

Field data collection using laptop computers is a new approach for the Census Bureau. Advantages include high data quality without extensive editing and quicker availability of results. Using a laptop computer to collect interview data offers some important advantages to you as well.

CHECK ITEMS, SKIP PATTERNS, REFERENCE DATES

AND PRONOUNS: The computer presents the correct sequence of questions based on the information and the responses already entered. The correct name or pronoun is inserted into each question as it appears on the screen.

AUTOMATIC EDITING: The laptop computer checks responses to ensure that all applicable items are answered appropriately. For example, where possible answers to a question are 1 (YES) or 2 (NO), the laptop rejects other answers such as 3 or 12 or Q.

RAPID TRANSMISSION OF DATA: Connecting your laptop to a modem and telephone lines enables you to transmit daily interview data directly to Headquarters. Your Regional Office knows by the next morning what work you have completed and sent in.

OVERALL EFFECT OF LAPTOP COMPUTERS: The use of laptop computers is expected to help you do your job more efficiently by eliminating tedious paperwork and freeing you to concentrate on the actual data collection and building rapport with respondents.

B. Questions About Skills and Experience

If you have little or no prior experience with computers, you may wonder whether you will enjoy working with the laptop and can learn to use it skillfully.

B. Questions About Skills and Experience,
Continued

EARLY RESULTS: Several data collection agencies, including the Census Bureau, have switched to Computer-Assisted Personal

Interviewing (CAPI) and the feedback has been quite favorable. Interviewers consistently report finding CAPI to be more satisfactory than Paper and Pencil Interviewing (PAPI) because it eliminates editing activities.

COMPUTER EXPERIENCE NOT REQUIRED: Prior experience with computers is not necessary to be successful with computer-assisted interviewing. Your computer work consists primarily of 1) making selections from "menus" displayed on the computer screen, and 2) entering respondents' answers in the appropriate spaces on the screen, just as you would fill appropriate blanks on a paper form.

TRAINING PROVIDED: A full program of hands-on training is provided for you. All necessary procedures are covered in self-studies, classroom training, on-the-job training and instruction manuals.

KEYBOARD SKILLS: You don't need to be a skilled typist. Although a little experience with typewriters or a computer keyboard may be helpful, it isn't necessary. Typing with a few fingers is sufficient for the types of entries that you will make on the keyboard.

C. Job Overview

As a CAPI FR you will use a laptop computer, rather than paper questionnaires, to conduct personal visit and telephone interviews. Assignments will be sent to your laptop electronically, via your home telephone line. You will send back your completed work in the same manner.

In other respects, your job is very similar to that of a non-CAPI FR. For example, your work will be observed regularly. Your

C. Job Overview,
Continued

performance evaluations will be based on factors such as response rate, accuracy, and production.

D. A Note On
FR Evaluation

The use of laptop computers has greatly changed the way that interviewing is done which makes it necessary to update our methods for evaluating the performance of FRs. Measurements used in evaluating FR's work include response rate, number of don't know and refusal entries. Availability for assignments and the results of observation are also included in the evaluation.

Notes

PART D - NHIS

CHAPTER 2. YOUR LAPTOP COMPUTER

	<u>Page</u>
A. Receiving, Unpacking, and Checking	D2-1
B. Battery, Power and Electricity	D2-2
1. Using AC Power	D2-2
2. Using Battery Power	D2-4
C. The Floppy Disk Drive (FDD)	D2-5
1. Connecting the Floppy Disk Drive(FDD)	D2-6
2. Disconnecting the Floppy Disk Drive(FDD)	D2-7
D. The Removable Hard Drive(HDD)	D2-7
1. To Install the Hard Drive(HDD)	D2-7

PART D - NHIS

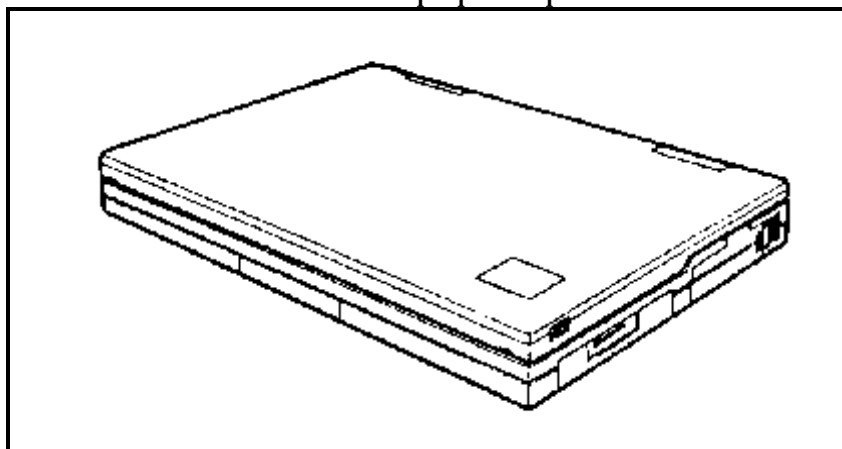
CHAPTER 2. YOUR LAPTOP COMPUTER

A. Receiving, Unpacking, and Checking

THE COMPUTER IS SENT TO YOU FROM THE RO:

Each FR receives a laptop computer (shown in Figure 2-1), a self-study guide, and all of the computer's required accessories such as cables, batteries, and a battery charger. This package is sent to the FR prior to initial training. For new FRs, the package may be delivered by an SFR, because the new FR must be sworn in as a Census Bureau employee before receiving the equipment. (You may also receive a "Getting to Know Your Laptop" video that explains the laptop and its accessories.)

Figure 2-1
Your Laptop Computer



OPEN CAREFULLY AND SAVE THE BOX: Open and unpack your computer kit with care. You may use a letter opener or knife to slit the sealing tape, but try to avoid tearing or shredding the box. You must save the box and all internal packaging materials. Store these where they will not get wet, damaged, thrown out, or used for other purposes.

USE THE BOX FOR RETURNS: You will use the same box for mailing, whenever you have to return the computer to the RO, for repair or exchange, or at the completion of the project. Without the original packaging, preparing the computer for shipment is inconvenient and the chances that it will be damaged in transit are increased.

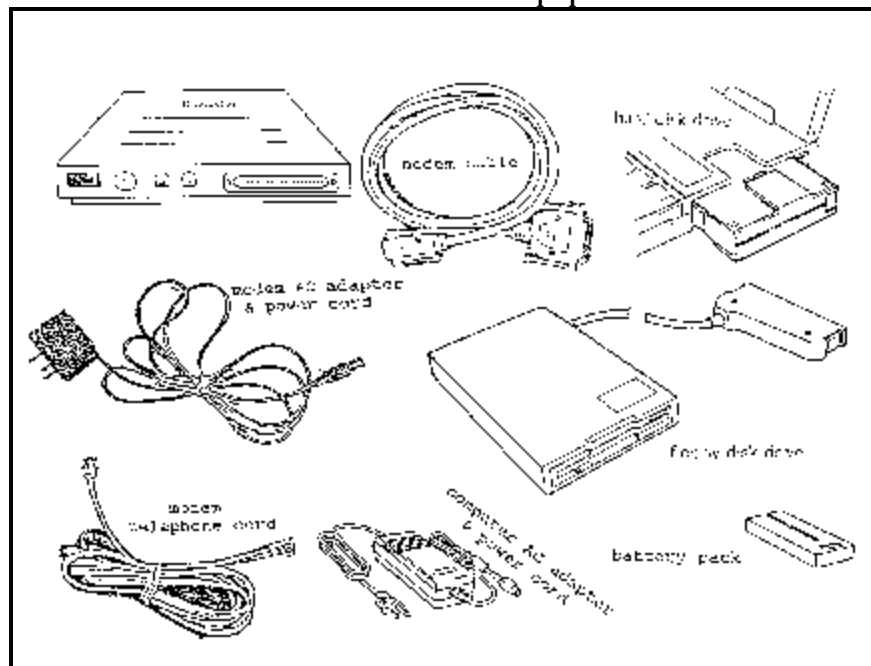
**A. Receiving,
Unpacking, and
Checking,
*Continued***

CHECK ALL THE PARTS: When you receive your computer, fill out the Receipt of Government Property form included, and return it to your RO to indicate that all items were received. Before attempting to use the computer, review this chapter and become familiar with all the pieces of the laptop equipment.

**B. Battery, Power,
and Electricity**

Your computer can be powered by an electrical current from an outlet (AC power) or by a rechargeable battery pack, shown in Figure 2-2. Battery power may be required for field interviewing. Several batteries are provided, to get you through a day of field work.

Figure 2-2
Additional Parts and Equipment



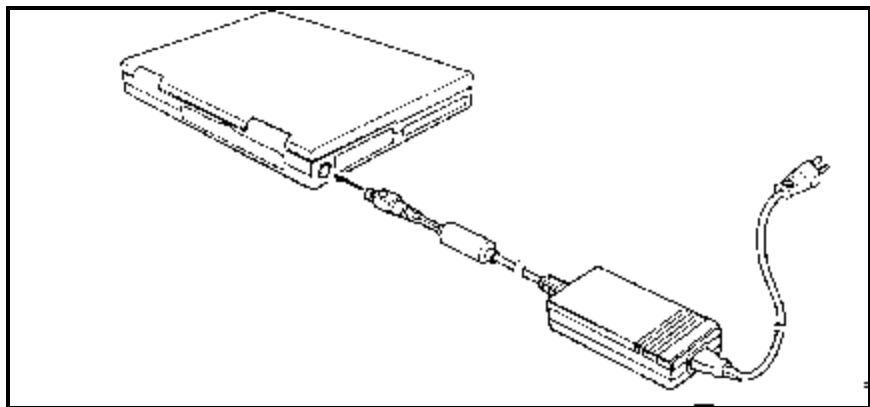
**B.1. Using AC
Power**

Your computer's 2-part AC adapter/power cord is illustrated in Figure 2-2. When properly connected to an electrical outlet using this adapter, the computer will not draw from its battery pack.

**B.1. Using AC Power,
Continued**

Plug the small round end of the adapter cord, arrow side up, into the DC In Connector on the left side of the computer near the screen. Next, connect the AC cord to the adapter and plug the 3 prong end of the adapter into a wall outlet. These instructions and illustrations are for the Librex laptop. Since there could be five different laptops, please refer to the User Manual for further instructions.

Figure 2-3
LAPTOP AC POWER CONNECTION



NOTE: To avoid damaging the computer, **first** connect the adapter to the computer, **second** plug the adapter into the outlet, and **third** turn on the computer.

Do not disconnect the adapter while the power is on. If you want to switch from one power source to another, turn the computer off first.

3-PRONG ADAPTER: The outlets in many homes may not accept a 3-prong grounded plug. Therefore, you will need to purchase a 3-prong adapter. These are available at hardware stores or supermarkets.

When not using AC power, unplug the adapter from the outlet and the computer.

B.2. Using Battery Power

Whenever the computer is not plugged into an electric outlet, it will run on battery power. When fully charged, a properly maintained battery should power the computer for about **2.5** hours. See specific User Manual for further instructions.

- a. **LOW BATTERY WARNING:** The computer will alert you when your battery power is running low. Whenever this happens during an interview, you must change the battery.

Because a lithium battery has been built into your computer, you might be able to make this change "on-the-fly," meaning that you do not need to stop and exit the interview you are working on.

- b. **TO CHANGE BATTERIES:** Changing batteries may vary depending on the laptop. Please refer to the Users Manual for further instructions.
- c. **DISCHARGE BATTERIES:** Unplug your computer from the outlet and leave it on. It will lose all power and shut off.

On some laptops, you may need to completely rundown the battery before recharging. Recharging partially used batteries will shorten battery life, depending upon the laptop model. See battery charging instructions for your specific laptop.

- d. **RECHARGING THE BATTERY INSIDE THE COMPUTER:** You can recharge the computer's battery pack inside the computer, by plugging in the computer and leaving it turned **off** for approximately **3.5** hours. Check the Power/Battery indicator light occasionally. It glows orange until the battery is fully recharged and then it goes out.

The battery will not recharge while the computer is turned on.

- e. **RECHARGING THE BATTERY USING THE QUICK CHARGER:**

**B.2. Using Battery Power,
Continued**

With the charger facing so that you can READ the words beneath the LED indicators:

1. Slide the battery into the charger. When properly inserted, you will hear the battery click into place.
 2. The CHARGING indicator glows red while the battery is charging. The READY indicator will glow green when the battery is completely charged.
 3. Allow about **3.5** hours for battery charging in the CHARGER.
- f. **WHICH BATTERIES ARE CHARGED?** Devise a system for keeping track of which battery packs are charged and which are discharged. For example, placing a rubber band on each freshly charged battery and removing it when you swap the battery in the computer is one method of doing so. The specifics of this routine are not important, however, attempt to avoid confusion about which batteries are charged.

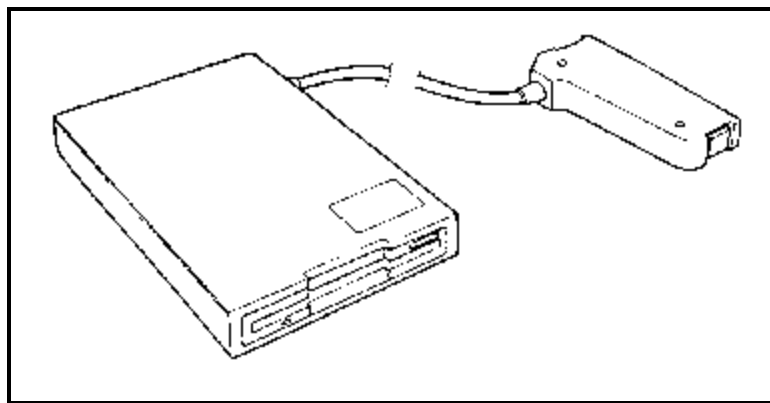
C. The Floppy Disk Drive (FDD)

On some laptops the 3.5" floppy disk drive is **not** built into the laptop. It is necessary for you to connect this drive whenever you use a diskette. For example, you will need to connect the floppy disk drive when you make your daily backup as discussed in Chapter 6. See specific User Manual for further instructions.

C.1. Connecting the Floppy Disk Drive (FDD)

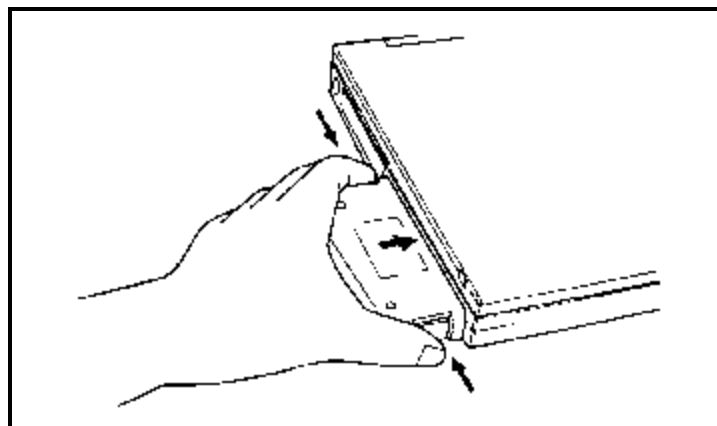
- a. Locate the connector. Make sure that all covers are closed and that the computer is turned **off**.
 - b. Insert the FDD connector.
- ! Squeeze the latches on both sides of the FDD connector so that it fits into the connector.

Figure 2-4
CONNECTING THE FDD



- c. Release the buttons and press the connector. The buttons pop out when the diskette drive connector is connected.

Figure 2-5
FDD RELEASE LATCHES



**C.2. Disconnecting
the Floppy
Disk Drive
(FDD)**

With the computer turned off, press the buttons on both sides of the connector (Figure 2-5) to detach the FDD from the computer.

**D. The
Removable
Hard Drive
(HDD)**

On some laptops, your supervisor may, for some reason, ask you to remove your hard drive and send it into the RO. For instance, your hard drive, alone, may be responsible for certain laptop problems. This option allows you to continue interviewing with a replacement hard drive while the defective one is repaired. See specific User Manual for further instructions.

**D.1. To Install the
Hard Drive
(HDD)**

See the specific user manual instructions to install the HDD.

PART D - NHIS

CHAPTER 3. ACCESSING YOUR LAPTOP

	<u>Page</u>
A. Advance Preparation: Choosing a Password	D3-1
B. Power On	D3-1
C. First Login	D3-2
1. To Respond to the "First Time" Screen	D3-4
D. Changing Your Password	D3-5
E. Later Logins	D3-6
F. Expired Password	D3-7
G. Password No Longer Secret	D3-7
H. Casic Main Menu	D3-7
I. How to Make a Menu Selection	D3-8
J. Surveys Option	D3-9

PART D - NHIS

CHAPTER 3. ACCESSING YOUR LAPTOP

A. **Advance Preparation: Choosing a Password**

When using your laptop for the first time, you must know your 2 digit RO code (e.g., 25 for Chicago), and your 3 character FR code (e.g., A23). Choose a unique password. You will select a new one at the beginning of each month.

A password is like a combination lock that allows only you access to the confidential data stored in your computer. It prevents others from gaining access to it. When you choose your new password each month, avoid common English words. A password can consist of any combination of letters and numbers as long as the total number of characters equals 8.

An ideal password is a totally obscure mixture of numbers and letters, but you might also use fragments of several words, or one badly misspelled word. For example, try to think up a really unusual word (a foreign one, perhaps?), then misspell it or rearrange the letters, and finally throw in a digit or two someplace for extra security. However, don't make it so obscure that you'll forget it.

Memorize your password! Never write a password down, lest someone finds it and uses it to gain access to your laptop's confidential data. You must remember this password reliably, but after you type it a few times that should not be a problem.

If you ever forget your password, call your RO for assistance.

B. **Power On**

To turn on your computer and locate the power button. See specific User Manual for location of the Power button. The button must be pushed in and held for a few seconds on some laptops.

After the LED indicators flash on, you can release the power button. The computer will continue to perform a self-test and retrieve all

necessary information. If all functions pass the self-test, the computer beeps and displays the following screen:

**B. Power On,
Continued**

**Figure 3-1
Laptop Self-Test Screen**

```
36SX BIOS V3.10-026
Copyright (c)1984-90 Award Software Inc.

TESTING SYSTEM MEMORY . . . . . 640K PASS
TESTING MEMORY IN PROTECTED MODE . . . . . 5760K PASS
BIOS SHADOW RAM . . . . . ENABLED
VIDEO SHADOW RAM . . . . . ENABLED

< PRESS Fn+ SysRq FOR SETUP >
```

- If you don't see this screen, turn off the computer by holding in the power button until the screen goes blank. Wait a few seconds and try turning the computer on. If the screen above still does not appear contact your RO for assistance.
- If you hear a different pattern of beeping, look in the upper left corner of the screen for an error message. Copy the message exactly. Turn off the computer for at least 30 seconds and then turn it back on again. If this does not solve the problem, report the error message to your RO and request assistance.
- If the print on the screen is faint or hard to see, adjust the contrast and brightness controls for the screen if available.
- If the computer beeps periodically and/or the Power/Battery light begins flashing, while your laptop is plugged in, check for loose connections. If you are running the computer on battery power, turn the computer off and plug in to an AC outlet or change to a freshly charged battery, as described in Chapter 2. Make sure that if the AC outlet is controlled by a light switch, it is on.

C. First Login

When you turn your computer on, it automatically begins to execute a series of internal "checks" and file loading procedures, this process is known as a "login".

C. **First Login,**
Continued

Figure 3-2
New User Login Screen

```
**WARNING**WARNING**WARNING**WARNING**

YOU HAVE ACCESSED A UNITED STATES GOVERNMENT
COMPUTER. USE OF THE COMPUTER WITHOUT
AUTHORIZATION OR FOR PURPOSES WHICH
AUTHORIZATION HAS NOT BEEN EXTENDED IS A
VIOLATION OF FEDERAL LAW AND CAN BE PUNISHED
WITH FINE OR IMPRISONMENT (PUBLIC LAW 99-474).
REPORT SUSPECTED VIOLATIONS TO YOUR DIVISION
SECURITY OFFICER OR REGIONAL DIRECTOR.

**WARNING**WARNING**WARNING**WARNING**

                                CASIC Login

This is the first time you have logged onto your computer.
You must enter information to identify the computer as yours.

Please enter your 2-digit RO code: 25
Please enter your 3-character FR code: S26
Please enter your last name: SPEARS
Please enter your first name: JUDY
Please enter your Social Security number:
Is this information correct (Y or N)? Y

                                Your password has expired.
You must select a new one in order to continue.

                                OLD password:
                                NEW password:
                                VERIFY password:
```

NOTE: If the computer prompts you for your password only, instead of displaying this "first time" screen, the computer has already been set up for you. In that case, type your password and press the <Enter> key (located at the end of the third row, on the right-hand side of your keyboard).

**C1. To Respond
to the "First
Time" Screen**

The first time you use your computer, you are asked to enter "user identification" information. After this information is entered, it is stored in the computer and a user identification screen is displayed each time the laptop is turned on. This helps you identify which machine is yours at group training and the information is also used by the central database at HQ to identify transmissions. To enter user identification information:

- ! Type your RO code. Check that it is typed correctly and then press the <Enter> key.
- ! Type your FR code (1 letter and 2 digits) and press <Enter>.
- ! Type your last name, press <Enter>, type your first name, and press <Enter>. Up to 14 characters can be entered for each name. Capital and small letters make no difference, since the computer converts your name to all capitals.
- ! Type your social security number and retype to verify.
- ! The computer asks you to confirm (Y/N?) that everything is correct. Check carefully. Be especially certain that the RO and FR codes are yours.
- ! Press <Y> for yes or <N> for no, based on this verification. Do not press <Enter>.

<N> takes you back to the top of this form, where you must re-enter each piece of information, beginning with your RO code.

<Y> takes you to the password change screen for the next step in your first login.

When using your computer, look at the screen frequently to check your work. It is very important to check your entries on the screen before continuing.

**D. Changing
Your
Password**

The first time you use the laptop, a prompt may inform you that your password has expired. A pre-expired password is already programmed in the machine, so each FR must choose a new one immediately.

FOR OLD PASSWORD, type the word PASSWORD and press <Enter>. Notice that the characters you type do not appear on the screen. Typed passwords never appear on computer screens for security reasons. You will find this true on any password-protected computer with which you may come in contact.

If the computer beeps and rejects what you type, you have two more tries to get the old password correct. If you use up your three tries, a message appears that tells you to turn off the computer. Turn it off. You can turn the laptop back on and try again. If you still have trouble and are sure that you typed it in correctly, call your RO for assistance.

WHEN THE OLD PASSWORD HAS BEEN ACCEPTED, the computer asks you for your NEW password. Type carefully, since the characters do not appear on the screen. After typing all 8 characters, press <Enter>.

NOTE: At the beginning of each month, after the initial installation of your password the computer will ask you to change your password. The "OLD PASSWORD" will be the password you used during the previous month.

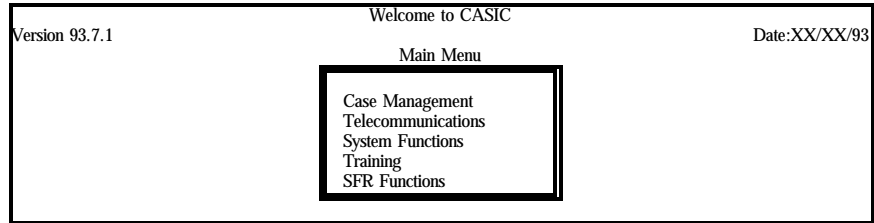
WHEN THE NEW PASSWORD HAS BEEN ACCEPTED, the computer prompts you to VERIFY the new password. Type exactly the same sequence of letters and numbers that you previously typed and press <Enter>.

If there is a mismatch between the new password and the verification, the computer notifies you of the discrepancy and you must start over, entering the NEW password again. Only after you have typed the new password and verified it does the computer accept and save your new password.

D. Changing Your Password, Continued

! When the new password has been accepted, the computer displays the Computer Assisted Survey Information Collection (CASIC) Main Menu (Figure 3-3).

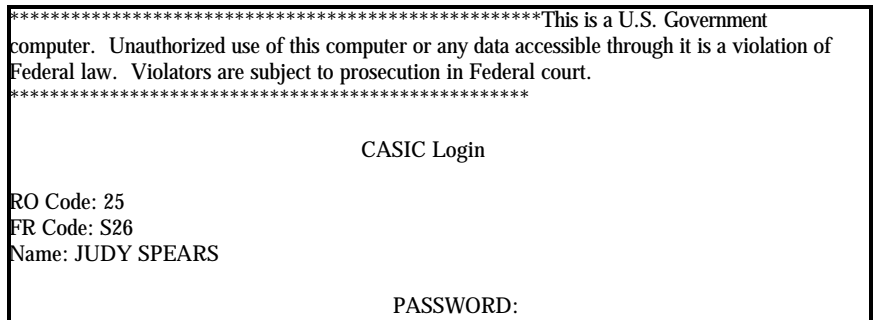
**Figure 3-3
Casic Main Menu**



E. Later Logins

In the future, when using the laptop, the login process is much simpler. The computer already knows your user identification information. It displays your RO code, FR code and full name, and asks you for only your password.

**Figure 3-4
Daily Login Screen**



! Type your password and press <Enter>. You are allowed three tries to correctly enter your password.

When the correct password has been accepted, the computer displays the CASIC Main Menu (Figure 3-3).

F. Expired Password Your password expires on the first day of each month, and you are prompted to enter a new one. As the first approaches, be prepared with a new password because you cannot re-use the same one as the computer keeps track of these. Refer to section 3.D for a description of those operations you will need to perform.

G. Password No Longer Secret If someone else uses or finds out your password, choose a new one and make the change in the computer immediately; even if your old password has not expired.

To change your password when it has not yet expired, follow the instructions for changing user-ID and password in Chapter 8 on System Functions.

H. Casic Main Menu The CASIC Main Menu offers you five selections.

CASE MANAGEMENT is used most frequently. This displays a list of the cases remaining to be completed, permits you to choose a specific case and begin an interview, as well as offering several other case-related functions. These are described in detail in Chapter 5.

TELECOMMUNICATIONS is the selection you will use to receive and transmit your data files to the central database at HQ. When communicating with the central database, your laptop will be connected to a modem and your telephone lines. You will usually only use this selection once a day during the interview period; to set up the laptop to make a nightly, automatic transmission or an occasional immediate transmission. Your RO may also request an extra transmission to pick up reassigned cases or mail. Telecommunications is also used to access the mail utility to read or create mail messages. These are described in detail in Chapter 4.

**H. Casic Main Menu,
Continued**

SYSTEM FUNCTIONS handles computer maintenance activities and any other functions not directly related to interviewing. This option is selected for daily backups and occasionally when certain items need updating (at the direction of your RO). System Functions are described in detail in Chapter 8.

TRAINING - The training option will "INSTALL REFRESHER CASES," access the "Training Case Management," and Computer Based training. You will be able to install refresher cases from this Training Menu. When you select "Install Refresher Cases," this option will not affect your regular case management; i.e., it will not delete any regularly assigned cases.

The Refresher Training Cases will not appear on the regular Case Management display. In order to access these cases you must select "Training Case Management" from the Training Menu. This will bring up a Training Case Management display of just the refresher cases. You will access all Refresher Case interviews from this display, not the regular Case Management Display.

THE SFR FUNCTIONS menu pick is displayed on all the laptops. SFR's will receive specific instructions on how to access and use these functions.

I. How to Make a Menu Selection

When the CASIC Main Menu appears, CASE MANAGEMENT is automatically highlighted. To select CASE MANAGEMENT, press <Enter>. To make another choice, use the arrow keys to move the highlight bar to TELECOMMUNICATIONS or SYSTEM FUNCTIONS. Once highlighted, press <Enter> to access those functions.

You can also make your selection by pressing the first letter of the option. If you press the letter to make your selection, you do not need to follow it with <Enter>. For example, on the main menu:

- 6 Press C to select Case Management
- 6 Press T to select Telecommunications

**I. How to Make
a Menu
Selection,
Continued**

6 Press S to select System Functions

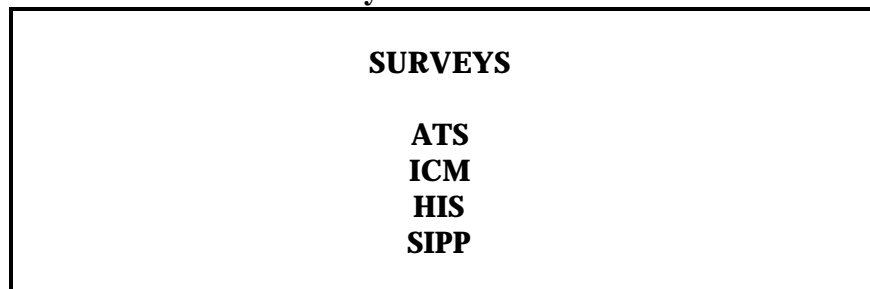
This method does not work if two or more options within the menu begin with the same letter. In such cases, pressing that letter selects whichever option occurs first on the list. Therefore, use caution until you become familiar with shortcut methods and where they can be used.

These methods of selecting menu items are standard throughout the CASIC menus. These methods DO NOT, however, apply in the instrument.

**J. Surveys
Option**

If more than one survey has been installed on your machine, a Surveys Menu will appear:

**Figure 3-5
Survey Selection Menu**



This menu will list all the surveys that are installed on your laptop. Whenever you select the CASE MANAGEMENT option from the CASIC Main Menu or any of the BACKUP, RESTORE, INSTALLATION, CLEANUP options from the System Functions Menu, this Surveys Menu will appear.

To select the survey you will be working on, move the highlight bar, using the arrow keys, and press <Enter>.

Refer to Chapter 5 in this manual for additional instructions on Case Management.

**J. Surveys
Option,
*Continued***

If there is only one survey installed on the laptop, the survey selections menu does not appear.

If a survey is selected that is different than the previous survey used on the laptop, the user will be prompted to reboot the laptop.

NOTE: This will only happen if you switch from the Current Population Survey (CPS) to any other survey (i.e., HIS or ATS) or switch from any other survey (i.e., HIS or ATS) to CPS. Switching between surveys such as HIS, ATS, and SILJ, will not result in the laptop instructing you to reboot.

PART D - NHIS

CHAPTER 4. RECEIVING AND TRANSMITTING YOUR WORK

	<u>Page</u>
A. Introduction to Telecommunications	D4-1
B. Telecommunications Setup Screen	D4-1
C. Equipment Setup for Data Transmission	D4-5
1. Modem/Phone Connection	D4-6
2. Modem/Computer Connection	D4-7
D. Making a Transmission	D4-10
1. Transmission Procedures	D4-10
2. Entering Hours and Miles	D4-12
3. Transmission Process	D4-13
E. Installing Software	D4-14
F. How to Access Case Management	D4-15
G. Use of Form CAPI-35	D4-17
1. Use Form CAPI-35 in the Following Ways:	D4-18
H. Transmitting Your Completed Work	D4-18
I. Instructions for Daily(Pre-Set) Transmissions	D4-19
1. Daily Transmissions	D4-19
2. Transmission Process	D4-22
3. Follow-up Procedures	D4-22
J. Final Transmissions	D4-24
1. Incomplete Interviews at Final Transmission	D4-25
2. Final Transmission Instructions	D4-29
K. Immediate Transmissions	D4-31
1. Transmission Instruction	D4-31
2. Transmission Process	D4-32
L. To Cancel a Transmission	D4-33
1. How to:	D4-33
2. To Resume After Canceling:	D4-33
M. To Prepare a Case for Retransmission	D4-33
N. To Transmit When Away From Home	D4-35
O. Files Sent From Your Laptop Computer to Headquarters	D4-35
P. Mail Messages	D4-36
Q. Instructions for Reading Incoming Messages	D4-36
R. Instructions for Creating Outgoing Messages	D4-38

PART D - NHIS

CHAPTER 4. RECEIVING AND TRANSMITTING YOUR WORK

A. Introduction to Telecommunications

"Telecommunications" refers to sending data over a telephone line. Your interviewing assignment, along with mail messages and any new software, is sent to your laptop computer via telecommunications. During the interview period, you will transmit your completed work to the central database (CDB) at Headquarters (HQ) each night.

To obtain your assignment or to transmit completed work, you connect your laptop computer to your home telephone line using the cables and modem provided. A modem converts laptop data into outgoing telephone signals and converts incoming telephone signals back into computer data.

You choose menu selections to direct your laptop computer to dial the toll-free number that connects your laptop to the telecommunications server at HQ. When the connection is made, files are downloaded to your laptop, your laptop unpacks and processes them, and your laptop uploads files from its' transmission directory to the server.

B. Telecommunications Setup Screen

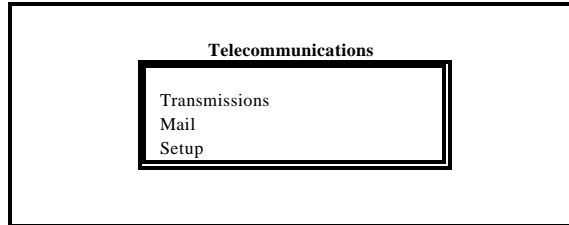
Your laptop computer must be set up to accommodate the specific attributes of the telephone system used in your household before you can make a transmission.

During the setup procedure, you need not connect your laptop to the modem and the telephone line as described below for making a transmission.

! From the CASIC Main Menu, use the arrow keys to move the highlight bar to the telecommunications line and press <Enter>, or press T, to select TELECOMMUNICATIONS. The following Telecommunications Menu should appear:

B. Telecommunications Setup Screen

**Figure 4-1
Telecommunications
Main Menu**



! Select SETUP. The telecommunications setup screen illustrated below will appear.

**Figure 4-2
Telecommunications
Setup Screen**

PHONE NUMBER		
TO DIAL CENSUS BUREAU	1-800-437-2841	
TOUCH TONE PHONE (Y/N)?	Y	
CALL WAITING (Y/N)?	N	
CALL BLOCKING (Y/N)?	N	IF YES ENTER BLOCKING CODE
ENTER THE TIME TO START TRANSMISSION		
HOUR IN MILITARY FORMAT: RANGE (0-23)	1	
MINUTE: RANGE (0-59)	0	
[F10] SAVE SETUP	[ESC] EXIT	

Answer each of the items, in the following ways:

B. Telecommunications Setup Screen,
Continued

1. **PHONE NUMBER** The HQ telephone number is pre-filled. Do not use this number for other calls to HQ, because a computer answers; it responds only to signals from the laptop computers.
 - a. **For transmissions from home**, begin with 1-800. If an access code is required to call an 800-number from your home, add these digits to the front of the number.
 - b. **For transmissions from your Regional Office**, begin with 9, followed by a comma, to get an outside line, followed by 1-800. The comma causes the modem to pause briefly after dialing the 9. If a longer pause is needed, insert another comma.
 - c. **For transmissions from a hotel**, find out the dialing sequence used, and edit the telephone number accordingly. For example, in some hotels, calling a toll-free number requires dialing 9-800 or 8-800.

To edit the phone number:

- ! Use the arrow keys (7896) to position the cursor for changes.
- ! Type over existing characters.
- ! Position the cursor under the character(s) you wish to erase and press the delete key (DELETE) to remove the character.

OR

B. Telecommunications Setup Screen,
Continued

- ! Position the cursor to the right of the character (or string of characters) you wish to delete and press the <Backspace> key to remove the character(s).
 - ! Position the cursor at the spot where you wish to enter text, press the INSERT (insert) key, type in all additional information, press the INSERT (insert) key again.
 - ! Use the arrow keys (7896) to move the cursor from space to space and line to line after making any necessary changes or to move without making any changes.
2. **TOUCH TONE PHONE (Y/N)?** This determines whether your modem will dial by using tones, or a series of clicks for each digit (pulse dialing). If you hear a tone when dialing, press Y followed by <Enter> to indicate touch tone; if there is a series of clicks for each digit, press N followed by <Enter> to indicate pulse dialing.
 3. **CALL WAITING (Y/N)?** Press Y or N followed by <Enter> to indicate if you have "call waiting" service on your line. (This is a signal, such as a clicking sound, that notifies you of a second incoming call when you are already using the line.) If you have call waiting, interruption by an incoming call must be prevented through the use of "call blocking."
 4. **CALL BLOCKING (Y/N)?** Press Y or N followed by <Enter> to indicate whether blocking of call waiting signals is available in your service area. If you don't know whether call blocking is available, ask your telephone company service representative.
- ! If you have call waiting, you need to have call blocking so that a transmission will not be interrupted.

B. Telecommunications Setup Screen,
Continued

! If you do not have call waiting service, call blocking is not applicable; in that case, press N followed by <Enter> for call blocking.

5. **IF YES ENTER BLOCKING CODE** If you answered Y to CALL BLOCKING, you must enter the blocking code here; type in the blocking code and press <Enter> to move on to another question. In many areas, the blocking code is *70, but there is some variation. Ask your telephone company for this information.
6. **ENTER THE TIME TO START TRANSMISSION** Your RO will tell you what time your regularly scheduled transmissions should be made. These transmissions will take place automatically, during the night. Enter the starting time in these spaces. If you are told to transmit at 4:30 a.m., for example, enter 4 for the hour and 30 in the minutes space. If you are to transmit during "p.m." hours, add 12 to the hour for military time. For example, if you are told to transmit at 4 p.m., enter 16 here (4+12). Press <Enter> to move between the answer spaces for the hour and minute.

When all the information is correct, press F10 to save it and exit from the setup program.

You must repeat this setup procedure **whenever there is a change in an answer to any of the questions**. You need not re-enter all of the items each time; make only the necessary corrections. Skip over those fields that do not change by pressing <Enter>, and then press F10 to save the changes.

C. Equipment Setup for Data Transmission

Figure 4-3 shows the setup of the modem equipment you use with your laptop to make a transmission. Follow the instructions in this section to ensure that all cable connections are correct. As an easy reference, on the bottom of some modems, under the jacks are

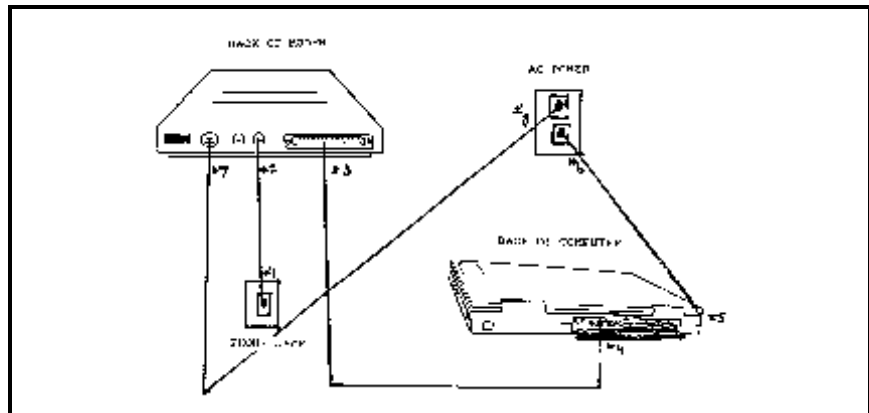
C. Equipment Setup for Data Transmission

pictures indicating the appropriate use for each jack. Turn the modem so that the jacks on the back are facing you. If these instructions do not apply to your laptop, please refer to the users' reference manual.

C.1. Modem/Phone Connection

- a. Place your laptop computer and modem near a telephone outlet and an electrical outlet. You will need to use either a power-strip type extension cord (preferably with a surge protector), or plug the computer and the modem into two different wall outlets.

Figure 4-3
Equipment Setup for Data Transmission



- b. Unplug the telephone cord from the jack on the wall; set aside the telephone and its cord.

If you have an old-style modular plug (4 metal prongs in a square shape), or a permanently installed (not modular) telephone, conversion to a modular jack will be required. Contact your RO for assistance.

**C.1. Modem/
Phone
Connection,
*Continued***

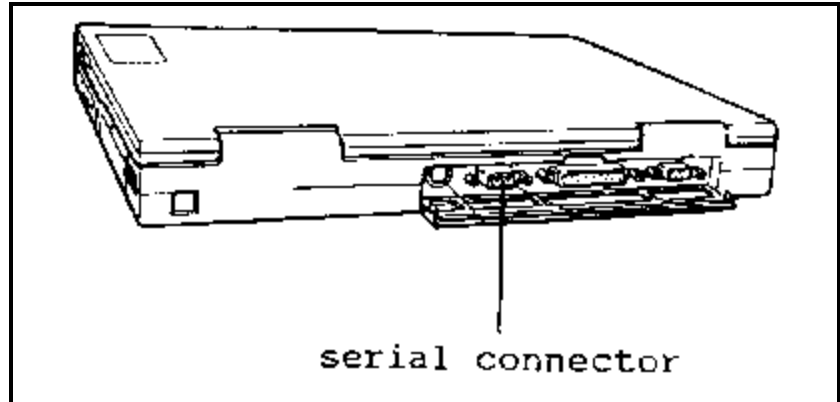
- c. Plug the telephone cord of your modem into the telephone jack on the wall (#1). When inserted correctly, the plug clicks into place.
- d. Plug the other end of the cord into the appropriate jack (#2) on the back of the modem (second one from the right) as indicated by a picture of a wall jack outlet on the bottom of the modem under the corresponding jack.

**C.2. Modem/
Computer
Connection**

- a. Use the RS232 modem cable to connect the modem to the laptop. Look at the back of the modem, the RS232 female serial connector is on the far right. Tighten the screws on each side enough to hold the connector firmly in place (#3).
- b. Open the cover on the back of the laptop; insert the modem cable plug into the male serial connector (#4).

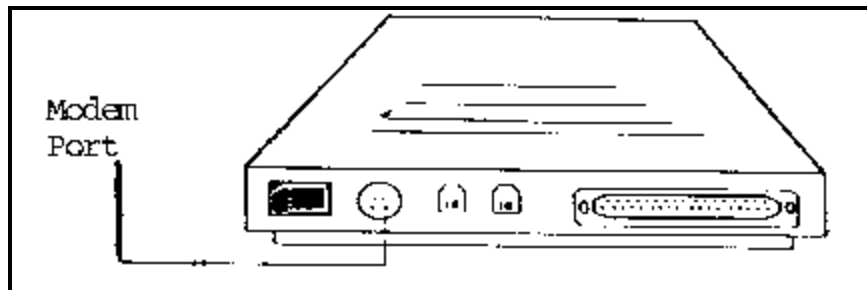
C.2. Modem/
Computer
Connection,
Continued

Figure 4-4
Serial Connector on the Laptop



- c. Plug the laptop computer's AC cord into the computer (Figure 4-3, #5); THEN connect the AC cord to the adapter and plug the end into an electrical outlet (#6).
- d. Plug the modem power cord into the modem. It fits in the port (Figure 4-3, #7) on the back of the modem; THEN plug the 3 prong end into an electrical outlet (#8).

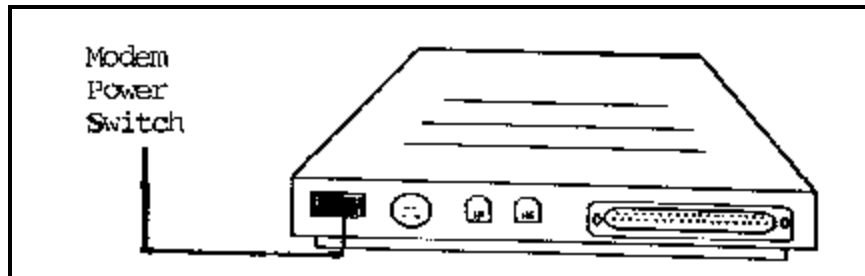
Figure 4-5
Modem Power Cord Port



- e. Locate the modem power switch. Turn it on. To determine the ON position, check the under-side of the modem. If the switch is flipped in the direction of the 0, the modem is off, to the 1, it is turned on.

C.2. Modem/
Computer
Connection,
Continued

Figure 4-6
Modem Power Switch



- f. Power up the laptop. It will start up normally, lighting up the LED indicators: MR (modem ready), CS (clear to send), TR (data terminal ready) on the front of the modem . Additional indicators may also flash on/off in a seemingly random pattern. This is normal behavior.

If no lights appear on the modem, check the power cord connection.

NOTE on telephone and modem use: You can also plug a telephone directly into the modem, while your computer is connected, so that both are easily accessible at all times. No splitter is required. Attach the end of the phone cord, which normally goes into the wall outlet, to the appropriate outlet on the modem, indicated by a picture of a telephone below it. The telephone can be used at any time except when transmissions are actually taking place.

NOTE on care of equipment: Avoid running cables across floors or doorways. To keep your equipment in good condition, also avoid twisting or coiling cables too tightly and do not let them become pinched or crushed in doors or drawers.

D. Making a Transmission

Your Regional Office will notify you of when to transmit to pick up your assignments and new or revised software. Your assignment cannot be sent to you without you initiating the call. You must also transmit daily during the interview period to send in your work and/or mail messages.

From the CASIC Main Menu, use the arrow keys to move the highlight bar to the telecommunications line and press <Enter>, or press T, to select TELECOMMUNICATIONS. The Telecommunications Menu is shown in Figure 4-1.

D.1. Transmission Procedures

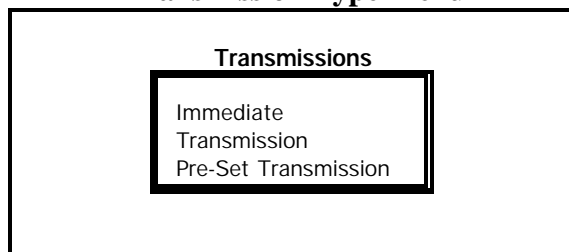
- a. From the Telecommunications Menu, select TRANSMISSIONS. The following message appears:

Have you done a backup and hooked up your modem (Y/N)?

If you are not ready to transmit (i.e., you haven't done your backup or your hook-up is incomplete), press "N" to return to the CASIC Main Menu. Otherwise, press "Y" to continue and press <Enter>.

- b. Select IMMEDIATE TRANSMISSION or PRE-SET TRANSMISSION (refer to the instructions given by your RO).

**Figure 4-7
Transmission Type Menu**



The menu (shown in Figure 4-8) will be displayed regardless of the choice of Immediate Transmission or Pre-Set

**D.1. Transmissi
on
Procedures,
Continued**

Transmission. The number of surveys displayed will depend on the surveys setup on your laptop.

**Figure 4-8
Transmission Selection Menu**

Survey	Trans Type	Hours	Miles
ATS		0.00	0
ICM		0.00	0
HIS		0.00	0
NSCG		0.00	0

[F10] Begin Transmission [Esc] Exit

Enter D or F for Type of Transmission

- 6 D - Daily Transmission
- 6 F - Final Transmission
- 6 Blank - Don't Transmit Survey

Enter Cumulative Hours and Miles for interviewing only.

If you are transmitting HIS work and there is more than one week on your laptop, you will be prompted for the quarter and week after you press enter.

- ! Press <ENTER> to highlight the SURVEY field.

- ! Use the arrow keys or the Enter Key to move the highlight bar to the TRANS type field. Enter DAILY (D) or FINAL (F) TRANSMISSION, followed by <ENTER>, to indicate the type of transmission.

**D.1. Transmissi
on
Procedures,
Continued**

! Enter your cumulative Hours and Miles worked.

! Press F10 to initiate the transmission process.

For an Immediate Transmission, the laptop will begin the transmission process immediately.

For a Pre-Set Transmission leave the laptop and modem connected and turned on so that the transmission can take place at the pre-set time, usually during the night. Do not close the cover on the laptop!

**D.2. Entering
Hours &
Miles**

Hours and miles worked each day for interviewing can now be entered on the telecommunications script by using the following instructions.

All FRs and SFRs will be required to enter on their laptops the number of hours worked and the number of miles traveled in relationship with their interviewing assignments. The hours and miles entered on the laptop will be cumulative, i.e., every day. Therefore, the numbers entered when making a final transmission should equal the cumulative total on the BC-27 for your interviewing assignment. Do not include time and miles charged to listing. You must continue to enter the hours and mileage on your BC-27.

When the transmission menu is selected the laptop will display a transmission screen which will prompt the user to enter the type of transmission, either D for Daily or F for Final. The prompt will then move to the Hours and Miles columns where the user must enter the cumulative hours and miles worked up through the time of the transmission. For example, if you worked 8 hours and traveled 22 miles while working on Sunday you should enter 8 in the Hours column and 22 in the Miles column when transmitting Sunday evening. If you worked an additional 8 hours and traveled an additional 12 miles on Monday you should enter 16 in the Hours

D.2. Entering Hours & Miles,
Continued

column and 34 in the Miles column when transmitting Monday evening. Continue to enter the cumulative hours and miles during each transmission for the current interviewing period. If during a period no work was performed and a transmission is made to pick-up reassigned work, CATI recycles, etc., enter the hours and miles (if any) that was last entered during the most recent transmission for the current month.

Hours can be entered in whole, quarter, half, and/or 3 quarter numbers as follows: 0.25, 0.50, 0.75, 1, 1.25, 1.50, 1.75, etc.

Note: The decimal point will automatically be inserted when entering a 2 digit or 3 quarter number (i.e. 0.75) you must type in the decimal point before the number. The zero (0) preceding the decimal point will automatically be inserted. Miles can only be entered as whole numbers.

DO NOT include any hours or miles associated with listing, reinterview, observation, completing the monthly self-study, or any operation which is not directly related to completing your interviewing assignment.

D.3. Transmissi on Process

For either type of transmission, the laptop prepares itself automatically. For an immediate transmission, it dials as soon as the files are ready. For a pre-set transmission, it checks the internal clock and waits until the time specified before dialing. (This is one reason why it is very important to make sure your system time is correct.)

During a transmission, various messages scroll by on the screen, lights flicker on the modem and, as the laptop makes the telephone connection, you hear a dial tone and dialing sounds. When the connection is successful, you hear a harsh, scratchy noise.

**D.3. Transmissi
on Process,
*Continued***

Your modem has a volume control along the right side. You can adjust it so that these sounds do not disturb you. Push the slide as far back as possible and slide the volume control toward you to increase the volume.

- a. **DO NOT PRESS ANY KEYS** during the transmission, though it may at times appear as if the laptop is prompting you to do so. The screen will also go blank for a short time. The messages reflect the telecommunication software's conversation between the laptop and the telecommunications server at HQ about the transmission. **Pressing any keys will disrupt the transmission and may cause data to be lost.**
- b. **DO NOT ATTEMPT TO USE THE TELEPHONE LINE**, or even pick up the receiver of any telephone on the same line, during the transmission. If you pick up the telephone, you will interrupt the transmission making it necessary to start over. Data may be lost by the interruption.
- c. **DO NOT DISCONNECT ANY CABLES OR TURN OFF THE MODEM OR LAPTOP** until the Transmissions Menu returns to the screen. This indicates that all transmission and file processing activities have been completed. An average size transmission (i.e., a full assignment) should take **no longer than 15 minutes**.

When the Transmissions Menu reappears, you can make another selection, or press ESC to exit and then turn off the laptop computer.

**E. Installing
Software**

Approximately 1 week before each assignment begins, you will be instructed to set up your laptop and modem and transmit to receive your new assignment.

E. Installing Software, Continued

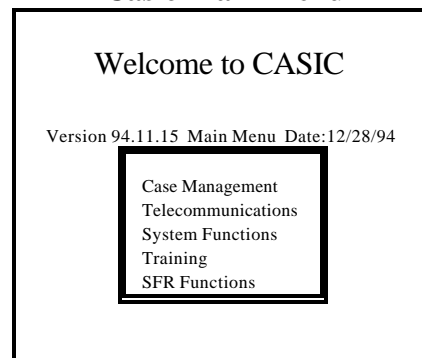
In addition to the assignment data, instruments, Case Management software or mail messages may also be transmitted. In order to get these items, initiate a transmission on a pre-set schedule as described in Section 4.D. In rare cases, you may be notified by your RO (by telephone or in a mail message) that automatic installation is not possible. If that happens, follow the INSTALLATION FUNCTIONS instructions in Chapter 7, PREPARATION FOR NEXT ASSIGNMENT.

F. How to Access Case Management

After a transmission to pick up assignments, your laptop is ready for you to browse through your list of cases and plan your work for the week.

! At the CASIC Main Menu, use the arrow keys to move the highlight bar to the case management line and press <Enter>, or press C, to select CASE MANAGEMENT.

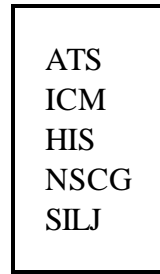
**Figure 4-9
Casic Main Menu**



F. How to Access Case Management, Continued

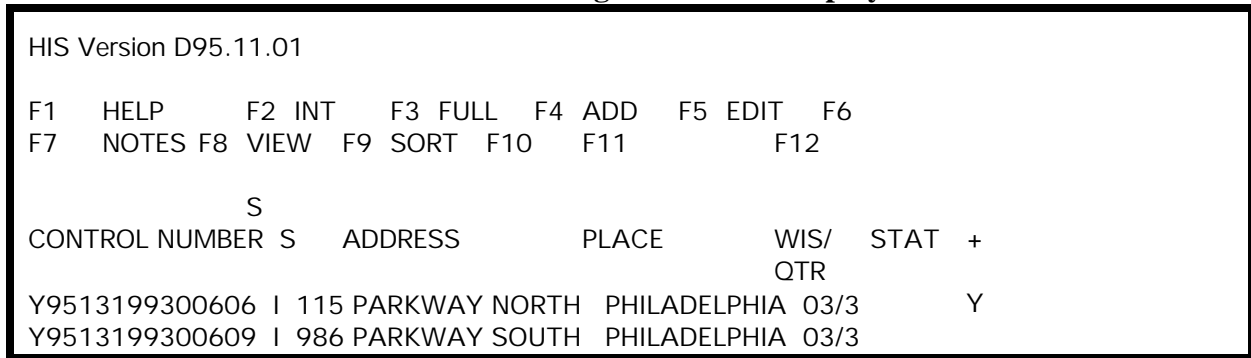
The menu shown in Figure 4-10 will be displayed after selecting Case Management.

**Figure 4-10
Surveys**



The case management main display contains a list of the available functions, plus a list of the cases in your assignment. This display will vary between surveys. Figure 4-11 shows the HIS Case Management Main Display.

**Figure 4-11
HIS Case Management Main Display**



**F. How to Access
Case
Management,
*Continued***

If you have an assignment for a particular week and have not completed your assignment, and no cases are listed on this screen, it means that the transmission of your assignment was not successful. Contact your RO to find out when to attempt the transmission again.

From the case management main display, you can look at the rest of your case list, view more information about specific cases (F3), enter notes (F7) and appointments for specific cases (F5) (these show up on the full display screen), and begin an interview (F2) (also available on the full screen). Chapter 5 provides detailed instructions for the use of all the case management functions. To determine which functions are available for your survey go into Case Management on your laptop.

**G. Use of Form
CAPI-35**

With each assignment, you will receive a form CAPI-35, FR Assignment List. This form lists the cases in your assignment, in a format very similar to your case management main display. You will also receive the segment folders for the assignment, requested interviewing supplies, and a calendar of "events" for the interview period.

The form CAPI-35, however, does not reflect changes to your assignment that may have been made after your initial assignment was generated. Additions and changes to your initial assignment, such as reassignments given to or taken from you, will be reflected on your laptop case management screen, not the CAPI-35.

G.1. Use Form CAPI-35 in the Following Ways:

1. After receiving both the CAPI-35 and your transmitted assignment, check the paper list against the case management main display. Verify that the number of cases is the same on both lists and that the individual addresses match. Notify your RO of any differences.
2. Look at the bottom of the CAPI-35 form to find out what listing activities are assigned to you. The laptop display does not contain any references to listing assignments.
3. Use the form CAPI-35 to make notes to yourself, such as the sequence in which you plan to contact the cases. **All notes intended for others to read must be entered in the laptop at the end of the interview**, since the CAPI-35 is not returned to the RO.

H. Transmitting Your Completed Work

Every 24 hours during the interview period, you must transmit your completed work to HQ. After running your daily backup (see Chapter 6 section C), set up your laptop and modem for the nightly transmission of your day's work. Make the appropriate menu selections (as instructed in Chapter 4 section D) to make a daily transmission on a pre-set schedule.

At the pre-set time, your laptop dials the toll-free telephone number and makes the transmission. In addition to sending your completed work and any mail messages you created that day, your laptop picks up anything waiting for you in the HQ computer. This may include cases being added to your workload, mail messages from the RO, and confirmation that your previous day's work was received.

When the entire procedure has been completed, your computer hangs up the telephone connection and the display returns to the Transmissions Menu.

I. Instructions for Daily (Pre-Set) Transmissions

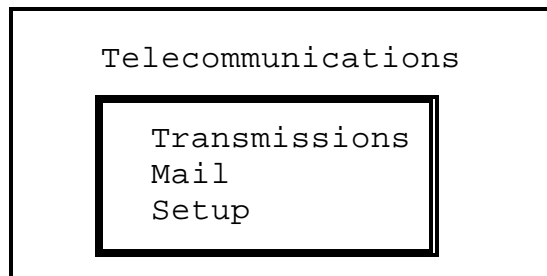
In preparation for making your scheduled daily transmission, be certain that all your equipment is set up and connected as described in section C, above.

I.1. Daily Transmissions

Starting from the CASIC Main Menu, select TELECOMMUNICATIONS.

- a. Select TRANSMISSIONS.

**Figure 4-12
Telecommunications
Main Menu**



The following message appears:

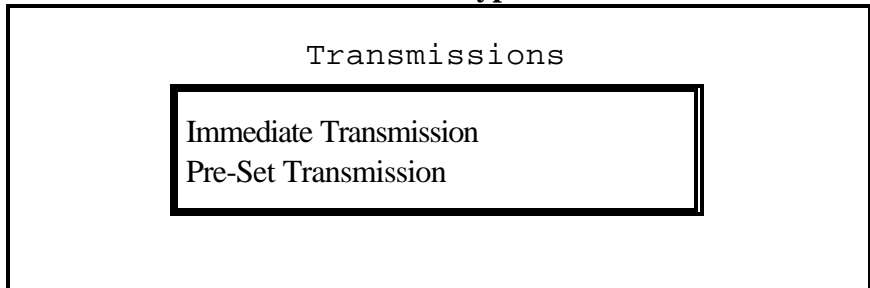
Have you done a backup and hooked up your modem (Y/N)?

If you are not ready to transmit (i.e., you haven't done your backup or your hook-up is incomplete), press "N" to return to the CASIC Main Menu. Otherwise, press "Y" to continue and press <Enter>.

**I.1. Daily
Transmissions,
Continued**

- b. Select PRE-SET TRANSMISSION (refer to the instructions given by your RO).

**Figure 4-13
Transmission Type Menu**



The screenshot shows a menu titled "Transmissions" with a sub-menu containing two options: "Immediate Transmission" and "Pre-Set Transmission".

The menu (shown in Figure 4-14) will be displayed regardless of the choice of Immediate Transmission or Pre-Set Transmission.

**Figure 4-14
Transmission Selection Menu**

Survey	Trans Type	Hours	Miles
ATS		0.00	0
ICM		0.00	0
HIS		0.00	0
NSCG		0.00	0
SILJ		0.00	0

**I.1. Daily
Transmissions ,
Continued**

[F10] Begin Transmission [Esc] Exit

Enter D or F for Type of Transmission

- 6 D - Daily Transmission
- 6 F - Final Transmission
- 6 Blank - Don't Transmit Survey

Enter Cumulative Hours and Miles for interviewing only.

- ! Use the arrow keys to move the highlight bar to the appropriate survey selection and press <Enter>.

- ! Use the arrow keys to move the highlight bar to the TRANS TYPE field.

- ! Unless today is the last day (closeout as specified on the calendar distributed to you by your RO) of the interview period, select DAILY <D> TRANSMISSION.

- ! Press F10 to initiate the transmission process.

- ! After making this selection, do **nothing** else to the computer until after the transmission is completed or until morning if it is scheduled for overnight.

Do not close the lid of the laptop while it's turned on. The screen may overheat and crack or darken permanently.

I.2. Transmission Process

When you make the menu selection to initiate a transmission, your laptop computer begins to prepare itself for transmission. Once ready, it waits until the specified transmission time.

NOTE on use of the telephone: While your laptop is waiting to make a transmission, your telephone line is not in use. Telephone calls may be made and received during the waiting period, up until a few minutes before the scheduled transmission time; refer to the Telecommunications Setup Screen for a reminder of your scheduled transmission time.

When the transmission time comes, the laptop dials into the HQ computer, exchanges files, and hangs up. Your screen returns to the Transmissions Menu. If the connection is not made on the first attempt, it will try again up to 5 times. When your laptop is set up to transmit in the middle of the night, you need not stay up and watch. If you do choose to watch, do not make any keyboard entries, pick up the telephone, or disconnect any of the equipment during the transmission.

I.3. Follow up Procedures

In the morning, the Transmissions Menu should appear on the screen. Take the following steps before shutting down the laptop or doing more interviews:

- a. Read your TRANSLOG.MAI messages, using the instructions for reading mail messages given in section R. Following a successful transmission, you should always have a confirmation message. If the transmission was unsuccessful, you are expected to attempt another transmission or call your RO before doing anymore field work.
- b. When your transmission from HQ includes any new cases, information will be included about the number of new cases. You will see the following lines in your message:

**I.3. Follow up
Procedures,
Continued**

Number of cases added to database = #

- c. Check the count of your transmitted cases, to determine whether that part of your transmission was successful:
Return to CASE MANAGEMENT, press F8 to select FIND, then select COUNT CASES. The Count Cases Display screen is shown below.

**Figure 4-15 Count Cases Screen
Counts for all cases**

Not Interviewed	: 3
Interviewed cases	: 0
Open cases	: 0
Partial Interviews	: 2
Type A cases	: 0
Type B cases	: 0
Type C cases	: 0
Type D cases	: 0
Total cases	: 5
Transmitted cases	: 0

**I.3. Follow up
Procedures,
*Continued***

Press any key to continue.

- ! Since this display may vary between surveys go into Case Management on your laptop to see this screen for your survey.
- ! Any cases that were transmitted the night before should now be shown as received.
- ! If these counts are not correct, call your RO. You may be instructed to make another transmission before doing more interviewing, so they may ask you to mark certain completed cases for re-transmission, as described in section M, below.

Check the Count Cases Display Screen each morning for changes. Cases received at HQ tend to be less than the number of cases transmitted (by the amount of cases included in your last transmission) because the received notice won't arrive until you make your next transmission. If you notice that **considerably** fewer cases have been received than the number you think you have transmitted, report it to your office.

NOTE on utility outages: If you ever discover that your telephone service is out, call your office from another telephone. If you are prevented from making your transmission due to widespread failure of the telephone system (due to an electrical storm, hurricane or earthquake, for example), do your best to contact the RO as soon as telephone service becomes available.

**J. Final
Transmissions**

At the end of each assignment, you must make a final transmission in which all remaining cases are transmitted by week in quarter, regardless of whether or not they have been completed. Procedurally, a final transmission is the same as a regular daily transmission. However, in order for cases to be placed in the

**J. Final
Transmissions ,
Continued**

correct directory on the laptop so that they can be transmitted, you must make sure that each remaining case has an appropriate outcome code:

For Unopened Cases with an Outcome of 200 - make them the appropriate Type A.

For Any Case with 202 Outcome Code (accessed instrument, no progress) - make them an appropriate Type A.

For Any Case with 204 Outcome Code (partial, followup needed) - make them a 203 (partial - no followup possible), instructing the laptop to transmit the case as no further information can be gathered.

**J.1. Incomplete
Interviews at
Final
Transmission**

By the end of the interview period, you must classify any partial interviews or un-contacted cases left in your assignment as appropriate types of noninterviews.

From the case management main display:

Select F3 to check the outcome code of all remaining cases; look in the OUTCOME column located in right column of the full display screen for each case.

- a. For each "not interviewed" case, those with no entry in the status column and outcome code 200, you must begin the interview and make the case a Type A in order to make it eligible to transmit. Use F2 to start the interview (unless **specifically** instructed by your supervisor not to send this case in). The following prompt appears:

**J.1. Incomplete
Interviews at
Final
Transmission,
*Continued***

You have selected:

James R. Smith

1485 Suffield Street Unit 68

Agawam, MA 908117789

**J.1. Incomplete
Interviews at
Final
Transmission,
*Continued***

1. Press "Y" followed by <Enter> to continue with the interview.
The following appears:

```
-START-

                                CENSUS CATI/CAPI SYSTEM
                                Date: 11-20-95
                                Ver: 1

SAMPLE: Y95    WEEK: 3
                CASE STATUS: New case

PSU: 13199
SEGMENT: 3001
SERIAL: 01

DATE IS: February 12, 1996
TIME IS: 11:27 a.m.

(P) Proceed
(Q) Quit -- Do Not Attempt now

(N) Noninterview
```

2. Press <N> followed by <Enter>.
3. A Noninterview Status Display Screen -TYPEABC-
appears:

**J.1. Incomplete
Interviews at
Final
Transmission,
*Continued***

4. Select appropriate Type A (Codes 1 - 5) and press <Enter>.
5. You will be led through a few more screens that ask you to verify the household address and type of housing unit. Enter these responses when prompted and the interview will end.

-TYPEABC-

FR: IS THIS A TYPE A, TYPE B, OR TYPE C
NONINTERVIEW? (IF NECESSARY, PRESS (H)
FOR EXAMPLE OF EACH TYPE)

- <1> TYPE A
- <2> TYPE B
- <3> TYPE C

- a. For each partial interview with an outcome code of 202, you must make it a Type A in order to transmit it. Use F2 to start the interview and follow the 6 steps in section a. of J.1. above.
- b. For each partial interview with an outcome code of 204, you must make it a 203 before making your final transmission. Instead of making the case a Type A, however, you must tell the computer that no more follow-up can be done and you are ready to transmit the case.

**J.1. Incomplete
Interviews at
Final
Transmission,
*Continued***

Use F2 to start the interview.

You have selected:

James R. Smith

1485 Suffield Street Unit 68

Agawam, MA 908117789

Do you wish to continue (Y/N)?

Enter a "Y" followed by <Enter> to continue with the interview.

Once you complete the case, exit the interview and the case will be ready to be transmitted.

**J.2. Final
Transmission
Instructions**

Make your final transmission for the assignment week on the date specified on the form CAPI-35.

Set up your laptop and modem as instructed in section C.

At the CASIC Main Menu, select TELECOMMUNICATIONS.

**Figure 4-16
Telecommunications
Main Menu**

Telecommunications

Transmissions

Mail

Setup

**J.2. Final
Transmission
Instructions,
Continued**

a. Select TRANSMISSIONS.

You are prompted:

Have you done a backup and hooked up your modem (Y/N)?
--

Enter a "Y" followed by <Enter>. Then select PRE-SET Transmission (unless your RO has told you to transmit immediately). The Transmission Selection Menu (as shown in Figure 4-17) appears.

**Figure 4-17
Transmission Selection Menu**

Survey	Trans Type	Hours	Miles
ATS		0.00	0
ICM		0.00	0
HIS		0.00	0
NSCG		0.00	0
SILJ		0.00	0

[F10] Begin Transmission [ESC] Exit

Enter D or F for Type of Transmission

- 6 D - Daily Transmission
- 6 F - Final Transmission
- 6 Blank - Don't Transmit Survey

**J.2. Final
Transmission
Instructions,
Continued**

Enter Cumulative Hours and Miles for interviewing only. If you are transmitting HIS, you will be prompted to identify the quarter and week after you press enter.

Your laptop displays the time it will transmit, as well as, the current system time. It performs the transmission automatically. As before, make no keyboard entries during the transmission, and do not attempt to use the telephone line to make calls.

Check following the transmission to make certain that you were successful. Your RO will notify you if there is anything more you must do.

**K. Immediate
Transmissions**

From time to time, it may be necessary for you to make a telecommunications transmission immediately, rather than waiting for your scheduled time.

When instructed, set up your laptop and modem as you would for a regular transmission

**K.1. Transmission
Instruction**

At the CASIC Main Menu, select TELECOMMUNICATIONS.

- a. At the Telecommunications Menu (Figure 4-16), select TRANSMISSIONS.
- b. At the Transmission screen, select IMMEDIATE TRANSMISSION.
- c. Next, select the survey to transmit.
- d. Then select DAILY or FINAL TRANSMISSION, whichever is appropriate.
- e. Then press F10 to begin transmission

K.2. Transmission Process,
Continued

The laptop will automatically execute the transmission process

Your laptop computer initiates the dialing procedure and contacts the HQ computer. As usual, messages scroll by, lights flicker, and the computer makes various noises.

- a. **During an immediate transmission,** stay nearby and observe what takes place. If problems arise, use the instructions in Chapter 9, TROUBLESHOOTING AND GETTING HELP, to make appropriate observations and take notes regarding the problem. Write down any on-screen messages that indicate failure to connect or cancellation of the transmission.
- b. **During file transmission,** a message window on your laptop screen shows what percentage of the current file has been transmitted so far. If this number does not gradually increase over 2 minutes time, cancel the transmission as instructed in Chapter 4 section L.
- c. **During the transmission DO NOT PRESS ANY KEYS, DO NOT ATTEMPT TO MAKE TELEPHONE CALLS, AND DO NOT DISCONNECT ANY CABLES OR TURN OFF THE MODEM OR LAPTOP.** Wait until the menu returns to the screen, indicating that the transmission activities have been completed.

After the Transmissions Menu reappears, you can make another selection, or use ESC to exit and then turn off the laptop computer.

Notify your RO if there were any problems during the transmission; be prepared to report what you observed.

L. To Cancel a Transmission

If it is ever necessary to cancel the transmission, it's preferable to cancel during preparation or while waiting for a pre-scheduled transmission, rather than after the telephone connection has been made.

L.1. How to:

Press the ESC key to cancel the transmission.

Normally, you should avoid interruptions once transmission has begun, but there is one exception. If the transmission has stalled (the "percent transmitted" box shows no change for several minutes), press ESC to cancel the transmission.

L.2. To Resume After Cancelling:

To resume making a transmission that was canceled, you must begin again from the CASIC Main Menu. From the Transmissions Menu, select PRE-SET or IMMEDIATE TRANSMISSION then select daily or final, as appropriate. The laptop will again prepare for transmission

M. To Prepare a Case for Retransmission

If the data from an interview become lost or damaged during transmission, you will be asked to re-transmit the case.

1. Your RO contact person will tell you the control number(s) of the cases to be re-transmitted.
2. From the case management main display, press F8 (VIEW). The following screen appears:

Count Cases Display Cases Find Name

3. Use the arrow keys to highlight DISPLAY CASES and press <Enter>.

M. To Prepare a Case for Retransmission,
Continued

4. Select TRANSMITTED cases. A list of your transmitted cases will appear.

The STAT column displays the current status, including the transmission status, of the case. Codes that may appear here include:

T = Transmitted

R = Received

I = Interviewed

A/B/C = Noninterview status

5. Using the arrow keys, highlight the first case that is to be retransmitted, and press R. The case will disappear from the screen.

! The laptop prepares the case for transmission.

! The list of transmitted cases reappears.

6. Highlight any additional cases in turn, and press R.

If, the laptop displays an error message, write down the message and the control number. Immediately call your RO.

7. When finished selecting cases for retransmission, press ESC until you return to the CASIC Main Menu.
8. Select TELECOMMUNICATIONS, TRANSMISSIONS, etc. to (re)transmit the case(s).

**N. To Transmit
When Away
From Home**

If you are working away from home, you may need to make a transmission from a hotel or other place that requires dialing differently. For example, dialing 8-800 or 9-1-800 instead of 1-800 may be necessary.

Before attempting such a transmission, make all necessary corrections to the telecommunications setup screen (as described earlier in section B of this chapter).

Changes made in the setup screen remain in effect until the next time you change the information. Therefore, before making a transmission from home you must change the setup screen to reflect your home telephone service and dialing procedures.

**O. Files Sent From
Your Laptop
Computer to
Headquarters**

The files from FR transmissions are sent to a telecommunications server at HQ. Every day, the Central Database (CDB) pulls files from this server and begins processing them. At this point, several things happen.

1. Interview data files are separated from the mail files and are passed through a check-in process in the CDB to determine if the case was completed and if the data was received in good condition.
2. Mail messages are forwarded to the RO supervisor.
3. Based on the check-in results, a message is created to transmit the following day to each FR notifying them which files were checked-in and if they were received in good condition.
4. Data from the check-in is available through a Daily Receipts Report for the RO to review each day.

P. Mail Messages

The daily telecommunications transmission allows you to send electronic mail messages to the RO. A mail message is similar to any other letter or memo, except that it is created and read on a computer screen and stored and transmitted in electronic file form. Use such mail messages to:

- ! respond to a mail message from the RO staff;
- ! report a CAPI problem (contingent, of course, on the fact that the problem does not prevent you from making a transmission);
- ! ask a question about an administrative matter, such as your payroll or expense reimbursements,
- ! ask procedural questions,
- ! and order supplies from the RO.

Note: If you have a question needing an immediate response, telephone the regional office.

Q. Instructions for Reading Incoming Messages

To read your messages, select TELECOMMUNICATIONS from the CASIC Main Menu.

1. Select MAIL, then select READ MAIL MESSAGES.

**Figure 4-18
Mail Menu**



**Q. Instructions for
Reading
Incoming
Messages,
Continued**

If you have no message, your laptop will beep and show the message:

"No mail files present
Press any key to continue....."

2. You are shown a list of files and told to press <Enter> to read a file.

```
TRANSLOG.MAI
C0720.MAI
CERR.MAI
```

There are 3 types of files you can receive:

TRANSLOG.MAI - Tells you what files were uploaded into the CDB, what files were downloaded onto your laptop, how many cases you should have received, and if any new software was transmitted to you.

YC0720.MAI - This file contains any memo or message that your RO types in. It holds "basic conversation" items. The file name changes and is constructed as follows:

Y = survey designation
C = RO designation
07 = the month
20 = the date

CERR.MAI - This file is rare. It will contain error messages if an answer file was missing during an attempted transmission.

Q. Instructions for Reading Incoming Messages, Continued

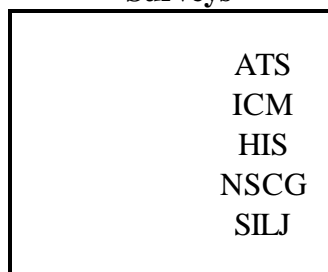
Highlight the appropriate one and press <Enter>.

3. The first screen of the message is displayed. Use the arrow keys (89) to move around in the message and view lines not on the screen.
4. When you have finished reading, press ESC to exit.
5. You are asked whether to delete the message. When you have no further need for the message, press Y to delete it; otherwise, press N to retain it.

R. Instructions for Creating Outgoing Messages

To create a mail message, select CREATE MAIL MESSAGES from the Mail Menu (Figure 4-18). Select the survey you wish to create mail for.

**Figure 4-19
Surveys**



**R. Instructions for
Creating
Outgoing
Messages,
*Continued***

1. The screen for creating mail messages appears:

Figure 4-20

The screenshot shows a terminal window titled "Mail". Inside the window, there is a text editor with the following content:

Subject: Vacation Days

This is to confirm that I will be out of town October 2-7, as we had previously discussed. In case of emergency, use the Ship-To-Shore telephone network to contact me on the Majesty of the Seas, Royal Caribbean Cruise Line, in the Western Caribbean.

[F10] Save [Esc] Exit

Create Mail Message Display Screen

2. You are first prompted to enter a subject for the message. When finished, press <Enter>.
3. Type the text of the message in the editor. If your message contains more lines than fit on one screen, the text scrolls automatically, giving you more lines to enter the text.
4. If you press ESC to exit the screen without saving the message, a message appears in the upper right corner of the screen that asks:

"Abort Edit? (Y/N)"

Enter the appropriate response in upper case. You DO NOT need to press <Enter>.
5. When you have finished typing your message, press F10 to exit and save the message for the next transmission.

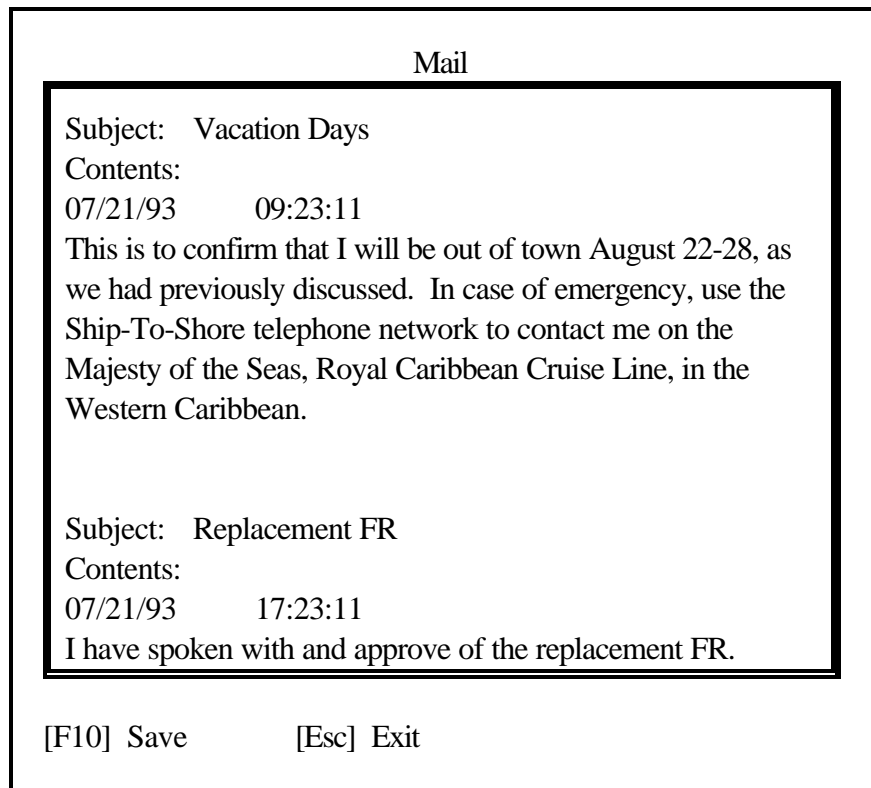
**R. Instructions for
Creating
Outgoing
Messages,
*Continued***

6. If you want to add to this message, you can edit a previous message up until the time you make a transmission. Follow the steps to access the Create Mail Message utility. A message appears:

"Do you wish to edit a previous message?"

The default is No, so type "Y" for yes and a list of the mail messages you created that day are displayed:

**Figure 4-21
Edit Previous Mail Messages
Screen**



All saved, untransmitted messages listed by subject, and date and time of creation are displayed. You are already in the mail editor

**R. Instructions for
Creating
Outgoing
Messages,
*Continued***

Use the arrow keys to move to the message you want to edit and just type in the additional text. Press F10 to save the edits.

7. If you have already saved a message, but want to create a new one, press <Enter> at the "Edit a Previous Message" question to accept the default No and you can enter a new subject and begin a new message (Figure 4-21). All saved messages are transmitted at the same time.
 - a. All the messages that you create go automatically to the supervisor.
 - b. If you are not yet comfortable with creating electronic mail messages, you can experiment with this option to learn more. Practice creating mail messages, and then throw them away without sending, by using ESC instead of F10.

PART D - NHIS

CHAPTER 5. CASE MANAGEMENT

	<u>Page</u>
A. Introduction to Case Management	D5-1
B. Case Management Main Display	D5-1
1. Control Number	D5-2
2. Screening Status	D5-2
3. Address	D5-2
4. Place	D5-2
5. The STAT Column	D5-3
6. The Notes Column	D5-3
C. Case Management Function Key Operation	D5-3
D. F1 Help	D5-5
E. F2 (INTERVIEW)	D5-5
F. F3 FULL	D5-6
1. Full Display Items	D5-7
G. F4 ADD	D5-9
H. F5 EDIT	D5-12
I. F7 NOTES	D5-15
J. F8 VIEW	D5-15
1. Count Cases	D5-16
2. Display Cases	D5-18
K. F9 SORT	D5-19
1. Sorting by Control Number	D5-20
2. Sorting by Week-In-Sample	D5-20
3. Sorting by Address	D5-20
4. Sorting by Status	D5-20
L. ESC-EXIT	D5-21

PART D - NHIS

CHAPTER 5. CASE MANAGEMENT

A. Introduction to Case Management

The case management program on the laptop provides a variety of functions to help you prepare and manage your workload during the interview period. These functions include a concise case list (main case management display) which presents pertinent information about each case. The information available is the control number, it's 1st line of address, and other management information. Since the case management screens will vary between surveys go into case management on your laptop and view the screen display for your particular survey. Additional case information can be accessed for each case. Some of the surveys may want to add extra units, set appointments, edit the name and address data for a case, sort cases in a different sequence on the list, and enter notes. Special view options let you search the list by address or control number. You can review the number of cases you have completed and the outcome types, as well as the number you have yet to complete. Lastly, you can begin an interview from the initial case screen, as well as the full display screen.

B. Case Management Main Display

When you select CASE MANAGEMENT for the Health Interview Survey (HIS), the main case management display appears as illustrated below.

**Figure 5-1
Main Case Management Display**

HIS Version 97.11.26										
F1	HELP	F2	INT	F3	FULL	F4	ADD	F5	EDIT	F6
F7	NOTES	F8	VIEW	F9	SORT	F10	F11	F12		
Control #	S	ADDRESS	PLACE	QTR	WIS/ STAT	+				
08131993021	I	12 Barnaby Way	Philadelphia		½	O	Y			

B. Case Management Main Display, Continued

Across the top of the screen is a list of what each of the function keys does. On the lower part of the screen is a list of cases to be interviewed. Up to 15 cases are shown at once, one line per case.

- ! To move the highlight bar through the list of cases, use the arrow keys (89).
- ! To move down a page (15 records) in your case list, use the PAGE DOWN key or the DOWN ARROW (9). To move up a page use the page up key or the up ARROW (8).

B.1. Control Number

The **CONTROL NUMBER** for each case will vary between surveys. For HIS the control number consists of the sample designation (3 digits), 1990 PSU code (5 digits), segment number (4 digits), and serial number (2 digits).

B.2. Screening Status

The **SCREENING STATUS** column will show either an "I," for interview, or an "S," for screening. If you see an "I" in this column, interview the household without checking for specific conditions. If you see an "S" in this column, you will only interview the household if specific conditions are met.

B.3. Address

The **ADDRESS** for each case consists of the first line of address.

B.4. Place

The **PLACE** column, shows the place or city name for the sample unit.

**B.4. Place,
Continued**

The **STAT** column displays the status code for the case. A blank means that the current status of the case is "not interviewed or opened." Other codes that may appear in this column are:

P = partial
O = open

A **partial** status indicates that only a portion of the interview has been completed. To review the actual outcome code that has been assigned to the case thus far, use the full display (F3) option.

An **open** status means that the case has been touched, but no data has been gathered yet.

**B.5. The STAT
Column**

Final cases (completed interviews and noninterviews) are not included in this display. The case list shows only what you still need to work on. To view completed cases, noninterviews, counts of cases transmitted and received at HQ, use the F8 key (VIEW) as described below.

You can use the STAT column to organize your workload by sorting (F9) the case list by case status.

**B.6. The Notes
Column**

The **NOTES** + column will either be blank or display a Y if there are notes that can be viewed. You use the F7 Notes key to review these notes. You cannot add to these notes. The only time you can enter notes is at the end of the interview. These INotes will be displayed in the F7 notes in case management.

**C. Case
Management
Function Key
Operation**

On the case management main display, the function, or "F", keys allow you to manage your assignment. These keys are at the top of your computer's keyboard above the digits; they are labeled F1 through F12. The keyboards may vary from one laptop to another.

C. Case Management Function Key Operation, Continued

Figure 5-2
Keyboard Layout of FR Computer



NOTE: The F1 through F12 keys perform different functions in the case management program than during an interview.

The complete list of the function key actions in the case management program are:

- | | |
|--------------------------|---|
| F1 | Obtain on-screen HELP |
| F2 | Begin an INTERVIEW |
| F3 | View a FULL case record display |
| F4 | Add an EXTRA unit |
| F5 | EDIT the record to make name and address corrections. Place an APPOINTMENT in a case record on the full display |
| F7 | Review NOTES |
| F8 | VIEW certain case(s) or count cases of a certain type |
| F9 | SORT cases by control number, week-in-sample, address, or status codes |
| F6, F10, F11, F12 | These keys are reserved for survey specific functions in the future. |
| ESC | EXIT the current screen to the previous screen |

The availability of these functions will vary between surveys.

D. F1 HELP

F1 is the standard key in both case management and the interview to use for the HELP function. The HELP screen will provide additional information or instructions. The contents of the F1 Help screens will vary, depending on where you are in the case management screen or in the interview. To request help, press F1. To return to the case management main display, press ESC.

**E. F2 INT
(INTERVIEW
)**

Highlight a case and press F2 to begin the interview. The following prompt appears to verify that you are at the correct address and have, indeed, selected the right case record for the interview you are about to begin.

The address which you have selected is:
2401 MUSTANG DR
SUITLAND, MD 06051

Do you wish to continue (Y/N)?

! Press N followed by < Enter> to return to the main case management display.

! Press Y followed by < Enter> to continue with the interview.

If you continue with the interview, the next screen you will see is the -PRE_START- screen. This screen will instruct you to:

! Activate your "CAPS LOCK" before continuing.

! Verify that the date and time shown on the screen are accurate. If you answer "No," you will be able to correct either or both.

The -COVER1- screen appears next. It provides you with information about our confidentiality guarantee, the average length of an HIS interview, and an address to which the respondent can write concerning any aspect of the collection process.

**E. F2 INT
(INTERVIEW),
Continued**

The next introductory screen, -START-, identifies the case id, the sample designation, interview week, case status, PSU, segment, serial number, current date and time.

At this screen, you are given the option of entering:

- 6 (P) to proceed with the interview
- 6 (Q) to quit the interview
- 6 (N) to identify a final noninterview.

If you are resuming a partial interview for HIS, you will go through the same screens--PRE_START, COVER1, AND START.

F. F3 FULL

To display full case management data for one case, highlight the specific case and press F3.

The full display screen for HIS in Figure 5-4 below.

Figure 5-4
Full Display Screen for HIS

```
CONTROL NUMBER: 08131993021                CASEID:0M000001
ADDRESS:
1465 BENSONHURST PARKWAY
DECATUR, GA 30343
(404) 555-4949

APPOINTMENT: 2-14-98 7:30 PM
WEEK-IN-SAMPLE      NOTES?  Y      OUTCOME:  202
QUARTER:           3      LIST?   N      ACTION:   01
SCREEN STATUS:     I      SHEET NO: 006   STATUS:   0
FAMILY NUMBER:    2      LINE NO: 0003  ARCNUM:  005
LETTER SENT? Y                                STUDY:   HIS_TRN1
```

**F. F3 FULL,
Continued**

At the bottom of the full display screen, you will see the following symbols:

[Page-Up] 8 [Page-Down] 9 [F2]Int [F7] Notes [Esc] Exit

- ! Use the page up or page down key to view the full display screen for the previous or next case on the list. If there are no more cases to display in a particular direction, the same case remains on the display screen.
- ! To begin an interview from the full case screen, press F2.
- ! To review notes for a case, press F7.
- ! To return to the case management main display, press ESC.

**5.F.1 Full Display
Items**

Figure 5-4 shows you the items on the HIS full display screen. These items include:

CONTROL NUMBER For HIS, you will see a 14-digit number, that is comprised of the sample designation (Y97), the PSU (13199), the segment (3021), and the serial number (01).

Case ID (sequence number) The number used by your RO to name the files associated with this case. This number changes each month.

ADDRESS The sample unit's address, plus place name, state abbreviation, and ZIP code. The first line of this address is displayed on the initial case list.

TELEPHONE NUMBER A telephone number will appear, if available.

APPOINTMENT This shows the month, day, year and time of a scheduled appointment, if one has been made. Appointments are set up from the initial case list (F4), but will only appear on this full display screen.

**5.F.1 Full Display
Items,
Continued**

WEEK-IN-SAMPLE Identifies into which week the case belongs.

QUARTER Identifies into which quarter the case belongs.

SCREEN STATUS Either an "I" or "S" will appear here. "I" indicates that you interview as usual. "S" indicates that you will screen the household before determining whether or not to interview.

FAMILY NUMBER Identifies the total number of families in the sample household.

LETTER SENT? This indicates whether the RO sent the household an introductory letter.

NOTES A "Y" indicates the presence of permanent interviewer notes for the case. Press F7 to view the notes.

LIST? Will show either a "Y" or an "N" to indicate whether or not listing activities are required for the sample address. Refer to your CAPI-35 for specific information about listing.

SHEET NO and LINE NO Identifies the sheet and line number to find the sample unit on the listing sheet in your segment folder.

OUTCOME A 3-digit code indicating the current outcome or completion status of the case.

ACTION A 2-digit code used to send the case through the correct processing paths.

STATUS A letter code that is derived from the outcome code. Included in the STAT column is the Transmission status indicated by a T (Transmitted) or a R (Received) in the STAT column.

ARCNUM A 3-digit code used as a processing identifier.

**5.F.1 Full Display
Items,
Continued**

STUDY You will need to use this study name when copying a trace file.

The information in the full display screen will vary from one survey to another

G. F4 ADD

The F4 key is used when you discover that an extra unit must be added to the sample. HIS will use this function.

- ! Place the highlight bar on the case whose address is most closely related to that of the case to be added. This case is referred to as the "Parent Unit."
- ! Press F4 to display the Case ID and address of the "Parent Unit".
- You are prompted to enter case management data for the new case.

**G. F4 ADD,
Continued**

Figure 5-5

CONTROL NUMBER:	Y9513199300101A	CASEID:	A0000001
HOUSE #	SUFX	STREET	UNIT DESIGNATION
432		JACKSON WAY	
LOCATION:			
PLACE	ZIP	COUNTY	
ATLANTA, GA	30333		
Is this a mobile home? (Y/N):			
Is this a Multi-Unit? (Y/N):			
Is this unit identified by a number or letter? (Y/N):			
Is this a Group Quarters? (Y/N):			
Group Quarters Name:			
Group Quarters Type:			

Adding an EXTRA Unit

- ! The serial number suffix is pre-filled with a letter. If this is the first unit added off of the Parent Case, an A will be filled. If it is the second case being added off of the case, a B will appear, etc.
- ! Correct the first line of address as needed and add a second line when necessary.

To keep all or part of the present address, press < Enter > .

To replace characters, type over them. To delete characters, use either the backspace key (7) or the DELETE key.

**G. F4 ADD,
Continued**

To insert characters, press the INSERT key. Use the arrow keys to position the cursor where you want to add the character(s), and type the character(s). Press INSERT again to turn off the insertion mode. "Ins" appears in the upper right corner of the screen when the INSERT has been turned on.

- ! Place as much of the street address or location description on the first address line as possible.
- ! Next, you must give a "Yes" or "No" response to a series of questions designed to identify if the EXTRA unit is in mobile home, a multi-unit address, identified by a number of letter, and in a group quarters. If the EXTRA unit is in a group quarters, you will identify the GQ name and type.

When all information for the new case is correct, press F10 to save the record. Press ESC to quit without saving the record. After you save a record for a new case, the case appears on your case management list.

NOTE on adding a record by mistake: Be cautious when saving a new record. You cannot delete a record after it has been added. If you add a record by mistake, place notes in the record explaining the mistake. Send the supervisor an electronic mail message, separate from these notes, explaining the problem and listing the case id.

NOTE on adding an extra unit to a completed case: Completed cases are not displayed on your active case list. To add an extra unit when the parent case has already been completed:

- From the Case Management Main Display, select F8 (VIEW) to access the record for the parent case.
- Select DISPLAY CASES.
- Select ALL cases to display.

**G. F4 ADD,
Continued**

- Highlight the appropriate case.
- Press F4 to add the new case, using the same instructions as listed above.
- Use F10 to save the new case record.

H. F5 EDIT

The F5 key permits you to edit selected items on the case management record for the highlighted case. Use F5 to make a correction if you discover, for example, that any portion of an address is incorrect.

! When you press F5, the following screen is displayed:

H. F5 EDIT, Continued

**Figure 5-6
Case Management Edit Screen**

CONTROL NUMBER: 08131993021 CASEID:0M000001
ADDRESS:
1465 BENSONHURST PARKWAY
DECATUR, GA 30343

(404) 555-4949

APPOINTMENT: 2-14-96 7:30 PM

WEEK-IN-SAMPLE: 03	NOTES? Y	OUTCOME: 202
QUARTER: 3	LIST? N	ACTION: 01
SCREEN STATUS: I	SHEET NO: 006	STATUS: 0
FAMILY NUMBER: 2	LINE NO: 0003	ARCNUM: 005
LETTER SENT? Y		STUDY: HIS_TRN1

[F10] Save Changes [ESC] Exit

ONLY the highlighted fields can be edited. For HIS, these fields include address, location description, telephone number, appointment date and time, and screen status.

Move the cursor (the blinking underline) to the beginning of the appropriate field using the TAB key.

1. Use the left (7) and right (6) arrow keys to move to the desired position within the name, address or phone number if only certain characters are to be changed.
2. The < Enter > key moves down, or back to the top of the record if you are already in the last field.
 - To make corrections, you can type over existing characters. Use the backspace key (7) to erase characters to the left of the cursor or use DELETE (the delete key) to erase the character at the cursor position

**H. F5 EDIT,
Continued**

- To insert characters, place the cursor at the desired spot, press the INSERT key, then type the characters to be inserted. The insert key acts as a toggle, press it again to turn off the function.
- Press F10 to save the corrections and return to the main display; use ESC to return without saving the changes.

The F5 key also permits you to enter an appointment for the case record that is currently highlighted.

NOTE: Appointment entries are made automatically when you exit an incomplete interview and schedule a callback appointment.

To set an appointment, press F5. The screen that is displayed in Figure 5-6 appears. The appointment field is highlighted.

1. Type 2 digits for the month, then 2 digits for the day of the appointment.

! DO NOT PRESS < Enter > after filling each field.

2. Type 2 digits for the hour, and 2 digits for the minutes of the appointment time.
3. Type A or P to indicate an a.m. or p.m. appointment time.

For example, 06-30 02:30P

In this example, an appointment is set for June 30 at 2:30 p.m.

The computer edits your entries in each of the appointment fields:

- Month cannot be greater than 12
- Day cannot be greater than 31

**H. F5 EDIT,
Continued**

- Hour cannot be greater than 12
- Minutes cannot be greater than 59
- Last character must be "A" or "P"
- BLANKS may be entered in any or all of the fields

If you receive an error message about an invalid value, press any key to continue.

4. To return to the beginning of the edit screen, press page up.
5. To delete an existing appointment, use the < space bar> to blank out fields.

Press F10 to save your entries or changes and return to the main display. Press ESC to exit without saving the appointment.

I. F7 NOTES

By pressing F7 at the case list, you can enter notes concerning the case while in case management. During an interview, you can also enter notes about a case at the INOTES screen in the back portion of the instrument.

After entering a note, always enter your FR code and the current date. To save your note in case management, press F10. Press ESC to leave the notes screen without saving the note.

J. F8 VIEW

The F8 View key has a multitude of uses. It helps you to:

- ! Retrieve a daily count of completed, transmitted, and HQ-received cases in your assignment,
- ! Display certain types of cases on a modified case management screen, and
- ! Search for specific cases by address or control number. You can also use the F8 View function to add an extra unit when the parent case has already been completed (see section 5.G).

**J. F8 VIEW,
Continued**

NOTE: For Phase I of HIS (2/96 - 6/96), the option to add an EXTRA unit to a completed case is NOT available.

! Press F8 to use the VIEW option. VIEW offers 2 choices, listed at the top of the screen:

**Figure 5-7
List of F8 View Options**

Count Cases Display Name

! Use the up (↑) and down (↓) arrow keys to highlight the option and press < Enter > .

J.1. Count Cases

The count cases screen displays the number of cases in your entire case management file, tallied according to the categories shown on the next page:

**J.1. Count Cases,
Continued**

**Figure 5-8
Count Cases Screen
(counts for all cases)**

Not Interviewed	: 3
Interviewed cases	: 0
Open cases	: 0
Partial Interview	: 2
Type A cases	: 0
Type B cases	: 0
Type C cases	: 0
Type D cases	: 0
Total cases	: 5
<hr/>	
Transmitted cases	: 0
Cases received at HQ	: 0

This screen may vary between surveys. When you are done viewing this screen, press any key to continue.

1. TOTAL cases equals the sum of the categories above it.
2. TRANSMITTED cases include all cases that have been sent to the HQ computer, including completed interviews, final noninterviews, and final partial interviews

**J.1. Count Cases,
Continued**

3. RECEIVED cases at HQ includes all transmitted cases whose receipt in HQ has been acknowledged. There is a one-day lag on this acknowledgment.

**J.2. Display
Cases**

The display caes screen offers several search possibilities. When you select DISPLAY CASES from the "View Options" menu, a list appears showing the possible types of cases that can be displayed. This list is illustrated below.

**Figure 5-9
Display Cases Screen**

Display Cases
All
Not Interviewed
Interviewed
Partial
Type A
Type B
Type C
Type D
Transmitted

Options on this screen provide modified case management displays that list a variety of cases, sorted by particular type.

You can view all cases in your assignment, those still on your case list, as well as, those already completed.

**J.2. Display
Cases,
Continued**

You can view cases not interviewed, as well as, those interviewed. You can also receive displays of cases that are partially complete, Type A, B, or C, and those that have been transmitted. You can also retransmit a case from the display cases screens.

On the ALL cases list, you see a screen listing the same columns found on the initial case list, but your available options at the bottom of the screen are limited. These options are F2 to interview a case, F3 to display the full display for a case, F7 for notes, (S) to restart a case, and ESC to exit.

NOTE: If you restart a case, you will lose any information collected during the interview. Always check with your supervisor before restarting a case.

On the list of Not Interviewed, Interviewed, Partial, Type A, B, C, and D cases, you see the same type of screen as for the ALL cases option.

On the list of Transmitted cases, you see the same type of screen as for the ALL cases option, with the addition of "R," which allows you to retransmit a case. Chapter 4, section 4M, explains how to retransmit a case.

K. F9 SORT

The F9 SORT function for HIS permits you to resequence your list of cases by control number, week-in-sample, address, and status. The sequence cases are sorted by will vary between surveys. Refer to case management to determine the sort sequence for your survey.

! When you press F9, all four options are offered on the screen. This is illustrated below.

K. F9 SORT,
Continued

Figure 5-10
Sort Pop-Up Menu

```
Version 94.7.1

F1  HELP   F2  INT   F3  FULL  F4  ADD   F5  EDIT  F6
F7  NOTES F8  VIEW  F9  SORT  F10          F11      F12

Sort By:  Control Number Week-In-Sample Address      Status
```

! Use the left and right arrow keys to highlight an option and then press < Enter > . Your case list will be resequenced and reappear almost immediately in the chosen sequence.

The new sequence continues in effect until you change it. This means that your sort will still be effective even when you turn your computer on/off or begin/end an interview

K.1. Sorting by Control Number

Your cases are normally ordered by control number. This sort may be useful for organizing cases geographically as you plan your work.

K.2. Sorting by Week-In-Sample

For HIS, you will normally have more than one week's assignment on your case list. At times, you could even have cases more than one quarter on your case list. This option will help you keep track of your assignments.

K.3. Sorting by Address

If you sort by address, the cases will be displayed alphabetical order by place name.

K.4. Sorting by Status

Cases of each status code are grouped together, with the codes listed alphabetically: blanks are first, then O and P. This is useful when searching for cases grouped by Not interviewed vs. Partial status code. To get additional status information (is., A, B, C, T, R) review Display cases under the Find F8 option (section 5.K2)

L. ESC - EXIT

The escape key (marked ESC) is the standard way to return to the previous screen in case management.

Use the ESC key if you make a selection that you did not want, or whenever you want to exit the screen without saving any changes you have made.

REMINDER: Once in the interview, do not use ESC to back up.

NOTES

PART D - NHIS

CHAPTER 6. PROCEDURES FOR BACKUP AND RESTORE

A.	Introduction to Backups	D6-1
B.	Timing	D6-1
C.	Specific Backup Procedures	D6-1
1.	Backup Diskettes	D6-2
2.	To Run the Backup from the System Functions Menu	D6-2
D.	Possible Reasons for Restoring Data Files from Backup	D6-6
E.	Restore Files Instructions	D6-6
1.	To Restore Files from Backup	D6-6
F.	Restoring Software Programs	D6-9

PART D - NHIS

CHAPTER 6. PROCEDURES FOR BACKUP AND RESTORE

A. Introduction To Backups

Because there is always the chance that information stored in the computer can be erased or corrupted, it is necessary to make duplicate copies. These copies are called "backups."

During the interview period, **you must make daily backup copies of your work on a diskette** so that you can restore it to your computer if necessary.

This chapter explains how to create daily backups of the data on your computer and how to re-load or "restore" the data into your computer from the backups.

B. Timing

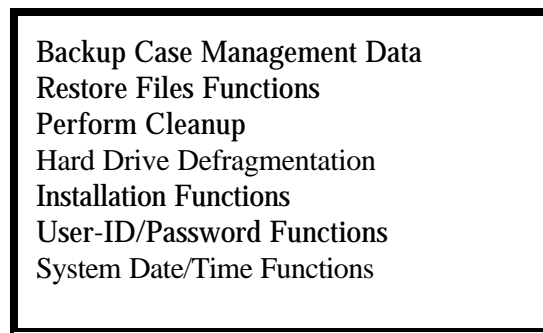
Your computer is equipped with an automated procedure for easily making backup copies. Remember to run this procedure each day after you have completed your work and **before** you make your nightly transmission.

C. Specific Backup Procedures

To begin the backup procedure, connect your external floppy disk drive as instructed in Part D, Chapter 2, section C. From the CASIC Main Menu, select the SYSTEM FUNCTIONS option. Once selected, the following menu appears:

Figure 6-1.

System Functions Menu



You will be provided with blank, formatted diskettes from your RO. Use these to back up your data.

C.1. Backup Diskettes

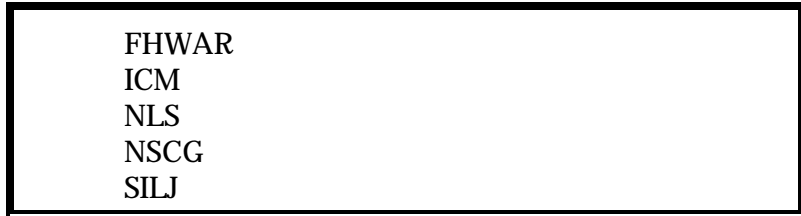
- a. Do not re-use diskettes that contain training files or software programs. These diskettes should be stored separate from your backup diskettes.

For instructions on how to view a file directory of the diskette, refer to Part D, Chapter 8 section B.1.

- b. Do not re-use the diskettes that contain your 2 most recent sets of backup files (ie., do not reuse Monday's backup disk(s) before Thursday).
- c. With a pencil, label each backup diskette BACKUP and record the date you made the backup. Keep a second diskette handy, just in case you have too much data to fit on one disk. You will be prompted to insert a second diskette if necessary.

C.2. To Run The Backup From The System Functions Menu

Select BACKUP CASE MANAGEMENT DATA from the Systems Functions menu. When selected, the following menu may appear depending on which survey you have on the laptop:



Select the survey you are working on.

- a. Place the diskette in the floppy disk drive. Be careful when inserting the diskette and make sure the label is facing up and an arrow is in the left hand corner.

C.2. To Run The Backup From The System Functions Menu, Continued

When selected, the following prompt appears.

This backup procedure will normally require one diskette. Insert additional diskettes when instructed to do so. Make sure to label diskettes accordingly.

Press any key to continue...

- b. Once you press any key the laptop will display the following message:

Backing up following directories:
c:\CM\XXX
c:\CM\XXX\DATA
c:\CM\XXX\BACKUP
c:\CM\XXX\FIN
c:\TELE\TRANS
C:\CM\XXX\E-INST
C:\CM\XXX\HIST
C:\CM\XXX\SAVED

Please wait

The XXX in the above named directories will indicate the actual survey, i.e. FHWAR, ICM ILJ, NLS (c:\CM\FHWAR\DATA).

The backup will take approximately 5 minutes depending on the amount of data to be backed up. The following message will be displayed upon completion of the backup:

C.2. To Run The Backup From The System Functions Menu, Continued

File backup complete.
Press any key to continue...

Once you press any key, the laptop will return to the Systems Function Menu.

If the diskette has not been inserted, the following message will be displayed:

Not ready reading drive A
Abort, Retry, Fail?

Insert a diskette at this time and enter an R (Retry). The backup will start once you enter the R.

- c. If you see a "general failure reading drive" error message, you may be using a new diskette which has not been formatted. (Formatting a diskette means preparing the diskette to accept files.) In that case, consult the DOS appendix. Also make sure the FDD (floppy disk drive) was properly plugged in and that you rebooted (restarted) the computer after connectint the external FDD.

WARNING: Do not remove the diskette from the drive while it is running; this can damage the diskette and the drive. Assume the drive is running as long as the red light is lit on the floppy drive. This indicates that the drive is in operation. Always wait until the drive has stopped and the light has gone out to remove the diskette.

- d. At some point in the procedure, the computer may BEEP and request an additional diskette. This happens when there is too much information to fit on one diskette.

C.2. To Run The Backup From The System Functions Menu, Continued

... The computer waits for you to change diskettes.

... Label your extra, formatted diskette with BACKUP #2 and today's date in pencil.

Press the diskette release button, slide diskette #1 out of the drive, and insert diskette #2.

Strike any key when ready.

- e. When the backup is finished, the computer displays the message:

File backup complete.
Press any key to continue...

Store the diskette(s) in a safe place, away from your computer and safe from excess heat and strong magnetic fields. If the backup was unsuccessful, contact your RO for help.

- f. The next two times you make your daily backup, use different diskettes. Thereafter, re-use the same diskettes on a rotating basis; that is, use the oldest first, etc.

REMINDER: Never use the same backup diskette two days in a row.

- g. Each time you re-use a diskette, be sure to write the current date on the diskette's label in pencil.
- h. After completing the backup procedures, press any key to return to the System Functions Menu.

There is no need to run the backup procedure on days that you do not work with the laptop computer.

D. Possible Reasons For Restoring Data Files From Backup

If your computer malfunctions and the problem is something more than can be fixed by only returning the removable hard drive, you might have to return the whole laptop for repair. Meanwhile, you will be sent a replacement laptop. In such cases you will be instructed to restore data from your backup diskette(s) to continue with your assignment.

Restoring data from a backup is also necessary if it is discovered that data is ever accidentally lost or corrupted on your computer. If you work carefully, this problem may never occur.

E. Restore Files Instructions

This procedure includes several options for recovering lost data from a backup copy. Options are available to restore single cases, the case management file (all cases), or the entire case management system.

Because restoring files from a backup will over-write (erase) your most recent work, this procedure is to be performed only under the direct supervision of your RO survey supervisor, supervisory clerk, or computer specialist.

The RO staff will also decide which of the options to use, based on the specific symptoms of the problem. You are not expected to know which option to use, but you are expected to know how to choose these options from the menu when instructed to do so.

The ability to restore data is a valuable safeguard against loss, but it is only as good as your latest backup. Failure to create a backup **each day** means that more than one day's work will be lost in case of serious hardware troubles. This results in having to **re-do** your previous days' work.

E.1. To Restore Files From Backup

Before beginning the restore files procedure, you must first connect your external floppy disk drive to your laptop as instructed in Part D, Chapter 2, Section B.

... From the CASIC Main Menu, select SYSTEM

**E.1. To Restore
Files From
Backup,
Continued**

FUNCTIONS.

- ... Select RESTORE FILES FUNCTIONS.
- ... Select the survey you are working on.
- ... Your RO directs you to select the whole case management file, one or more individual cases, or your entire case management system, as illustrated on the next page.

Figure 6-2. Restore Files Sub-Menu
Restore Files Functions



- a. Select CASE MANAGEMENT FILE. When selected, this option restores your entire case management data file from a backup stored in the computer. You do not have to insert a back-up diskette. A success or failure message appears when completed. Press any key to continue. The restore files menu reappears.

NOTE: The restored case management file will be in the same condition as when you exited from the last interview. Any appointments, added cases, or editing that you performed since the previous interview will be lost. These items must be re-keyed upon completing the restore procedure. The case management notes file for each case remains, but the "notes flag" on the case management main display, which signals the presence of notes, may be lost after the case management file is restored. The notes flag for each case reappears once you have accessed the notes for that case.

**E.1. To Restore
Files From
Backup,
*Continued***

NOTE: In the event that your case management file becomes lost or erased before you complete any interviews, it cannot be restored from backup. If this happens, it will be necessary to have your assignment re-transmitted from HQ

- b. Select ENTIRE CASE MANAGEMENT SYSTEM.
This procedure is reserved for recovery from a major disaster. All case management-related files will be restored from your most recent backup diskette.

This option is only used at the direction of the RO.

When you are instructed to restore the entire case management system, you are warned that any work completed since the last backup is not included.

Warning! Warning!

**This procedure will set your
entire case management
system to the state it was in
when you performed your last
backup!**

**THIS COULD RESULT IN
THE LOSS OF
COMPLETED
INTERVIEWS!**

**Do you want to continue
(Y/N)?**

You are asked (Y/N?) whether to proceed.

**E.1. To Restore
Files From
Backup,
*Continued***

Press N if instructed.

If you press Y, you are prompted to place your most recent backup diskette into the floppy diskette drive and the restore procedure will start automatically.

If your daily backup took more than one diskette, you will be prompted to change diskettes when necessary.

**F. Restoring
Software
Programs**

The previous sections described the menu options and procedures for restoring DATA that pertain to interviewing and case management. There may come a time when PROGRAMS (software) become corrupted and need to be restored or re-installed on your computer.

If you have trouble running any of the programs on your computer, call your RO for technical assistance. If they determine that a program has been lost or damaged, you will need to transmit and pick up a good copy of the software to install.

If your telecommunications program is not working, it may be necessary for the RO or HQ to send the replacement software to you on a diskette.

When you receive software files during a transmission, they are automatically installed. If you receive software files on a diskette instead, your RO contact person will tell you how to install the software, with the INSTALLATION FUNCTIONS instructions in
Part D, Chapter 7, PREPARATION FOR NEXT
ASSIGNMENT.

When the procedure is completed, try to operate the laptop software that was initially found to be corrupted and notify your RO whether it is working properly or not.

Notes

PART D - NHIS

CHAPTER 7. PREPARATION FOR NEXT ASSIGNMENT

	<u>Page</u>
A. Introduction	D7-1
B. Cleanup Operations	D7-1
C. Install Software Option	D7-2
D. Install Training Cases Option	D7-7
1. Refresher Cases	D7-7
2. To Install Refresher Cases	D7-8
E. Cleanup of Refresher Training Cases	D7-9

PART D - NHIS

CHAPTER 7. PREPARATION FOR NEXT ASSIGNMENT

A. Introduction

After completing your interviewing assignment, you need to perform a cleanup of your case management data prior to receiving your new workload. Additionally, you may receive new questionnaire software that needs to be installed. Both of these operations need to be performed before the next interview period.

B. Cleanup Operations

Cleanup operations are completely automated. When you make the appropriate menu selection, all appropriate case management data and files for the most recent interview period are deleted from your computer. The timing of cleanup is very important. It should not be done until a week after closeout for a wave.

After you have done your final data transmission for the Wave (see Part D, Chapter 4), perform a last backup of your files (see Part D, Chapter 6). Wait until a week **after closeout** to perform your cleanup.

... At the CASIC Main Menu, select SYSTEM FUNCTIONS, then select PERFORM CLEANUP.

... The following screen will appear:

FHWAR
ICM
NLS
NSCG
SILJ

Select the survey you are currently working on.

... The following screen will appear:

B. Cleanup Operations, Continued

Warning! Warning!

This procedure will destroy all case management currently on your system. It should not be done until a week after closeout for a wave. Also, a backup should be performed before starting this procedure.

... You are prompted (Y/N?) to continue with cleanup operations. (The default "N" is in a darkened box after the "?".)

If you type N or press < ENTER> , cleanup operations are not performed and the System Functions Menu reappears.

If you type Y, the cleanup operation begins.

... If the program detects that a final transmission has not been performed, an error message is displayed:

Cleanup cannot be done until after Final Transmission!
Press any key to continue.....

When the cleanup program terminates, the System Functions Menu reappears.

... If the program runs successfully, all case management data for the specified assignment week are deleted and you are returned to the Systems Functions Menu.

C. Install Software Option

Software is installed from diskettes sent to you from the RO. You may also install software at classroom training. Sometimes you can install a software upgrade when you make a transmission to headquarters. When software is

**C. Install Software Option,
Continued**

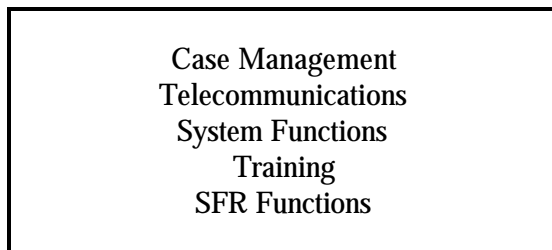
installed the main menu will have the version number located in the upper left corner of the screen.

Figure 7-1

Welcome to CASIC

****Version 94.11.23 Date 01/14/96****

Main Menu



Compare the version on your main menu to the date the Regional Office gave you. If the main menu version is correct, select Case Management, then select the survey you are currently working on. This case list screen will display the cases in your assignment as well as the version. The version is located in the upper left corner. This date should also be compared to the date the Regional Office gave you.

The version on the main menu will seldom change. But the date on the case list screen will change fairly frequently.

If either of these dates or both of these dates are incorrect you must retransmit to receive the new software. In order to install any new software sent to you on a diskette you may need to connect the external floppy disk drive to your laptop if your laptop does not have an internal disk drive. See specific User Manual for further instructions.

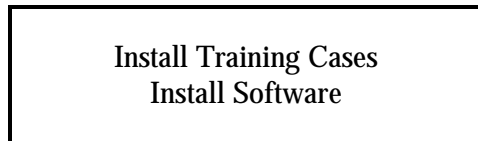
**C. Install Software
Option,
Continued**

From the main menu select System Functions.

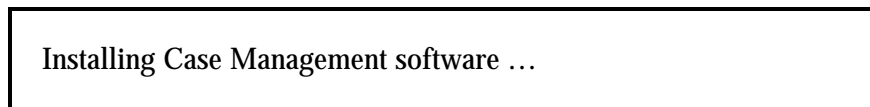
Select Installation Functions. The following menu appears:

Figure 7-2

Installation Functions



The laptop will display the following message:



Several minutes will pass before the following message appears:

Insert the LAST disk of the backup set - Press a key when ready

Insert the second setup diskette at this time. After a brief time the following message will appear:

Insert disk #1 - Press a key when ready

Insert the first setup diskette. Again, a short time will pass and the following message will appear:

Insert disk #2 - Press a key when ready

Insert the second setup diskette at this time. A short time will pass and the following message will appear:

**C. Install Software
Option,
Continued**

What survey do you wish to install?

FHWAR
ICM
NLS
NSCG
SILJ
Computer-Based Training

Select the survey you are installing software for. The following request will be displayed on the laptop:

INSERT LAST XXXCAPI DISKETTE
INTO FLOPPY DRIVE AND
PRESS ANY KEY

The message will say first or last diskette depending on how many surveys you will be installing.

XXX will be replaced with the letter abbreviation for the survey. For example:

FHWAR = National Survey of Fishing, Hunting, and
Wildlife-Associated Recreation
ICM = Integrated Coverage Measurement
NLS = National Longitudinal Survey
NSCG = National Survey of College
Graduates
SILJ = Survey of Inmates and Local Jails

The following messages may be displayed on the laptop during installation:

**C. Install Software
Option,
Continued**

```
Directory already exists  
Directory already exists  
Directory already exists  
Directory already exists  
Directory already exists
```

```
Installing XXX Case Management software ...
```

```
XXX installation complete!
```

```
Do you want to install another survey? N
```

```
REMOVE DISKETTE AND PRESS ANY KEY TO  
REBOOT SYSTEM
```

XXX will be replaced with the letter abbreviation for the survey.

If you are installing software for more than one survey, enter a Y when asked:

```
Do you want to install another survey? N
```

Otherwise just press ENTER.

Once you remove the diskette and press any key the laptop will reboot itself and you will be placed in the CASIC login screen. Be sure to correctly enter the RO code, your FR code and your name. If an entry was made in error, you will have the opportunity to correct it when asked the question:

```
Is this information correct (Y or N)?
```

The laptop will display the message:

Your password has expired.

**C. Install Software
Option,**
Continued

Enter the word password and press ENTER. Then enter your new password and press ENTER. Type the new password again for verification and press ENTER. You will then be brought to the Main Menu.

**D. Install Training
Cases Option**

For a new FR, the classroom cases and the self study cases will already have been installed on your laptop. For an experienced FR who has been assigned to a new survey, you will receive training setup diskettes which you must install. To do this follow the procedures in section C above.

Neither the self study nor the classroom training cases should exist on your laptop during interviewing. The training cases will be located in Case Management, as well as the production cases. It is imperative you do a cleanup before transmitting to pick up your production cases.

**D.1. Refresher
Cases**

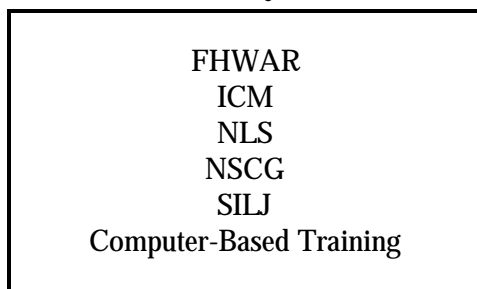
Refresher cases can be installed as often as you like. You can practice on these cases even during the interview period since they will have their own training case management.

You will not be able to transmit refresher cases to HQ. Only classroom cases and self study cases can be transmitted to HQ since they are in the survey case management.

D.2. To Install Refresher Cases

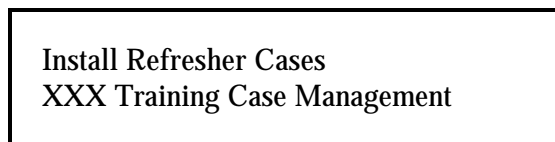
From the System Functions select Installation Functions. Then select Install Training Cases. The following menu will appear:

**Figure 7-3
Surveys**



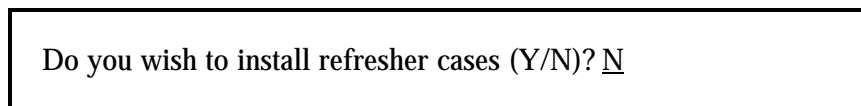
Select the survey you want refresher cases installed for or select Computer-Based Training. The following menu will appear:

**Figure 7-4
XXX Training**



XXX will be replaced with the letter abbreviation for the survey. For example FHWAR Training Case Management.

Select Install Refresher Cases. The following question will be displayed on your laptop:



**D.2. To Install Refresher Cases,
Continued**

Enter Y and press ENTER. If you are installing refresher cases in place of the refresher cases you currently have in training case management, the following message will be displayed:

Existing records found in training data base, installing refresher cases will result in loss of data.

Do you still wish to install cases (Y/N)? N

If you wish to replace refresher cases through the install, enter a Y and ENTER.

If you are initially installing refresher cases, the following will be displayed on your laptop:

Performing cleanup functions, please wait ...

Refresher training cases installed, Press any key to continue ...

Once you press any key you will be returned to the XXX Training menu.

Upon selecting CASE MANAGEMENT, you should see a number of refresher cases available to be interviewed. If not, try again or report the problem to your RO.

E. Cleanup of Refresher Training Cases

If you just want to overwrite your refresher cases with the same cases so that you can continue practicing, just install the refresher cases again. An automatic cleanup of the old cases is performed for you.

Notes

PART D - NHIS

CHAPTER 8. SYSTEM FUNCTIONS

	<u>Page</u>
A. Introduction	D8-1
B. Backup Case Management Data	D8-1
1. View a Directory	D8-1
C. Restore Files	D8-2
D. Perform Cleanup Functions	D8-3
E. Hard Drive Defragmentation	D8-3
F. Installation Functions	D8-3
G. Change User Identification Information	D8-3
1. Change User ID	D8-5
2. Change Password	D8-6
H. System Date/Time Functions	D8-6
1. Set System Date	D8-7
2. Set System Time	D8-8
I. DOS Functions	D8-9
1. Copy a File	D8-9
2. Delete a File	D8-10
3. Display Directory	D8-10
4. Formatting a Disk	D8-11
5. Check Hard Disk	D8-13
6. Exit to DOS	D8-13

PART D - NHIS

CHAPTER 8. SYSTEM FUNCTIONS

A. Introduction

System functions contains a variety of programs that handle all generic computer functions. These functions are performed using the system's Disk Operating System (DOS) programs, programs designed and written by Field's programming staff, or a combination of both. These operations do not affect case management, questionnaire, or telecommunications software.

Included under system functions are procedures for installing software and training cases, making backup copies of files, restoring files from backup, changing FR name/code/password, correcting the system date/time, performing cleanup operations, and certain DOS commands.

... At the CASIC main menu, select SYSTEM FUNCTIONS. The System Functions Menu appears. Seven options are available:

- Backup Case Management Data
- Restore Files Functions
- Perform Cleanup
- Installation Functions
- User-ID/Password Functions
- System Date/Time Functions
- DOS Functions

B. Backup Case Management Data

This option runs an automatic procedure that places a fresh backup copy of your work onto a diskette. You need to do this at the end of each day's work, before your daily transmission. Instructions for backing up daily work are contained in Part D, Chapter 6.

Before using a diskette as a backup, you should check its contents. The VIEW DIRECTORY option will normally be performed in conjunction with the BACKUP procedure.

B.1 View a Directory

To view a directory of the files on a diskette:

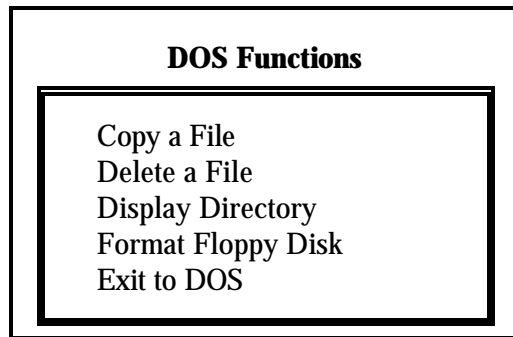
Slide the diskette, label side up, into the drive until it clicks.

**B.1 View a
Directory,
Continued**

From the System Functions Menu, select DOS FUNCTIONS.

At the DOS Functions Menu:

**Figure 8-1
DOS FUNCTIONS MENU**



... Select DISPLAY DIRECTORY. You are prompted for the name of the directory to display.

... To view the files on the diskette, type "A:" and press <Enter>.

Procedures for creating the daily backup are covered in detail in Part D, Chapter 6, PROCEDURES FOR BACKUP AND RESTORE.

Always store backup diskettes in a safe place, separate from the computer and away from heat and strong magnetic fields.

C. Restore Files

This option restores files if some become lost or corrupted. All cases or the entire case management system can be restored.

Because RESTORE FILES will overwrite current work, use it ONLY at the direction of your RO support person.

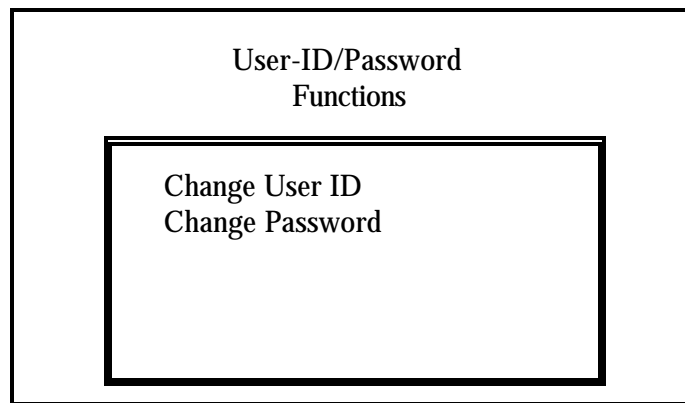
- C. Restore Files, Continued** Detailed instructions for restoring files are covered in Part D, Chapter 6, PROCEDURES FOR BACKUP AND RESTORE.
- D. Perform Cleanup Functions** This option erases all interview and case management data for the monthly interview period. It also deletes the corresponding mail messages. It is used only once, at the end of the interview period.
- Cleanup must not be done until a week after closeout for a wave. The Final Data Transmission and a file Backup must be performed **first**. Cleanup operations are provided in Part D, Chapter 7, PREPARATION FOR NEXT ASSIGNMENT.
- E. Hard Drive Defragmentation** Files are routinely saved (backed up) to the laptop's hard drive. Parts of a given file can become scattered (fragmented) to many parts of the drive. When you select a "fragmented" file, the laptop may function slower. The new option "Hard Drive Defragmentation" will help to speed it up. The process moves directories to the front of the disk, defragments all files, and moves all gaps to the end of the disk. Use this option only after the monthly cleanup. However, if the laptop is running slowly, you may run hard drive defragmentation anytime.
- F. Installation Functions** The System Functions INSTALLATION option is used to install software and training cases.
- Specific procedures for installation of new software is covered in Part D, Chapter 7, PREPARATION FOR NEXT ASSIGNMENT.
- G. Change User Identification Information** This option is used to change the RO code, FR code, FR name, and password. Regular monthly password changes are handled automatically by prompting the user during login.

**G. Change User
Identification
Information,
*Continued***

This option, however, is used to change your password at other times before your password has expired. For example, you must change your password if it is no longer secret. The password must also be changed when other user information needs changing because of errors in the information or because the computer has been redistributed to a different user (though your RO may set it up for you before sending it out).

At the System Functions Menu, select USER-ID/PASSWORD FUNCTIONS as appropriate.

Figure 8-2
SUB-MENU TO CHANGE USER INFORMATION



G.1 Change User ID

Select **Change user ID** to change your code and/or your name.

Change User ID

Please enter your 3-character FR code: S26

Please enter your last name: Spears

Please enter your first name: Judy

Is this information correct (Y or N)? Y

Password must be changed for a new user.

 OLD password:
 NEW password:
 VERIFY password:

... Following the prompts, type your FR code, press <Enter>, last name, press <Enter>, first name, press <Enter>.

... When asked (Y/N?) if all information is correct, check each item again. Press Y to store the information, or N to try again.

When you answer Y, the new data are stored. You are then required to change your password.

... For OLD password, type PASSWORD and press <Enter>.

... Type your new password, press <Enter>, type the new password again for verification, press <Enter>.

If the new password and the verification do not match, you are asked to try again.

G.1 Change User ID, *Continued*

Once finished, you are automatically returned to the Change User-Id/Password screen.

To back out of the CHANGE USER-ID and CHANGE PASSWORD screens, you cannot use ESC. If you have selected one of these screens by mistake, hold down the CTRL key and press C to return to the menu.

G.2. Change Password

Select **Change Password** to change password only.

... Type your old password and press <Enter>. You have three tries to do so correctly.

If you cannot remember the old password, obtain assistance from your RO.

... Next, type your new password and press <Enter>. It must be exactly 8 characters long, and cannot be the same as any previously used one. (See Chapter 3 for detailed information on passwords.)

... Type your new password again for verification and press <Enter>.

... When accepted, the new password is stored and the menu returns.

H. System Date/Time Functions

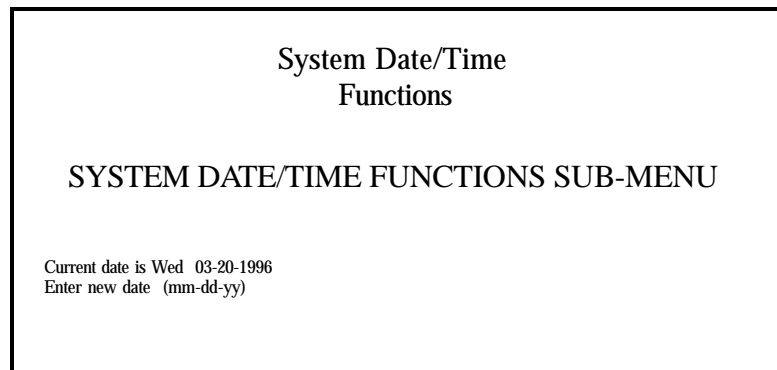
Your computer contains an internal calendar and clock, which must be accurate to properly time and date stamp your interview data and to make sure that your nightly transmissions occur at the correct hour.

Some laptops can lose time during the months. It is a good idea to check the system time at the beginning of each month.

H. System Date/Time Functions

Date and time are displayed on the screen at the beginning of each interview. If either one is incorrect, or if your RO notifies you to make a correction, use this option. Also, remember to adjust your computer's clock for DAYLIGHT SAVING TIME each spring and fall where applicable. (If you work in different time zones, set the clock for the correct time at home.)

Figure 8-3



H.1. Set System Date



Select **Set System Date** to make a date correction. You are shown a current date and invited to enter the correct value.

- a. If the current date is correct, press <Enter> to accept it and then press any key to continue.
- b. If the current date is incorrect, type the correct date in the indicated format (MM-DD-YY) and press <Enter>.

Press any key to continue.

H.2. Set System Time

Select **Set System Time** to make a time correction.

From the System Date/Time Functions sub-menu (Figure 8-3), select "Set System Time". The following appears:

Current time is 8:55:42.78a

Enter new time: 9:03

The new time is 9:03:00

Press any key to continue...

- a. If the time that is displayed is correct, press <Enter> to make no change then press any key to continue.
- b. If the displayed time is incorrect, type the correct time in the format HH:MM and press <Enter> then press any key to continue.

Use leading zeros to fill slots when necessary. You can also enter an "A" for a.m. or "P" for p.m. after the seconds.

- c. The computer uses a 24-hour clock, so you can add 12 to the hours for afternoon and evening times. For example, 5 p.m. would be 17:00, since $12 + 5 = 17$. Similarly, 8:30 p.m. would be 20:30 on the 24-hour clock. The computer automatically displays the time in the 12-hour cycle.

You can also enter "P" for p.m. for any time after 12 noon instead of adding 12 to the hours.

Press any key to continue. The prompt to select date or time returns to the screen.

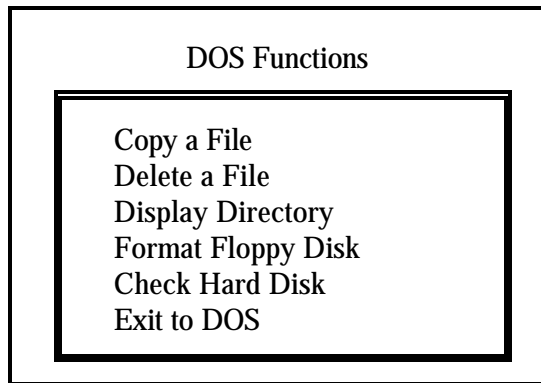
To return to the System Functions menu, press ESC.

I. DOS Functions

This option provides several Disk Operating System (DOS) functions that may be needed from time to time, primarily for troubleshooting purposes. Generally speaking, you will use DOS functions only upon receiving directions to do so from the RO.

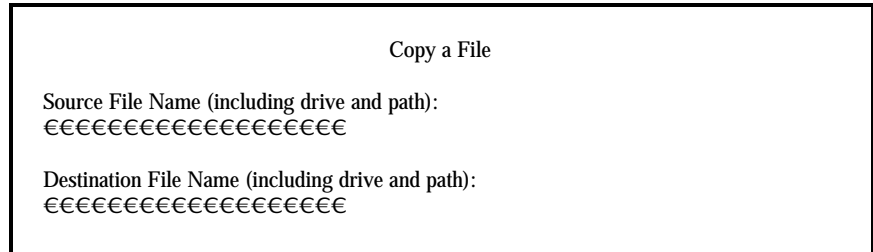
At the System Functions Menu, select DOS FUNCTIONS. The DOS menu appears:

Figure 8-4
DOS FUNCTIONS MENU



I.1. Copy a File

You select COPY A FILE only under the direct supervision of your RO. You are prompted to enter the full name of the file you wish to copy, its current location and its destination.



Information necessary to complete this process will be provided for you as need by your RO. Instructions are also included in Appendix A - Use of DOS.

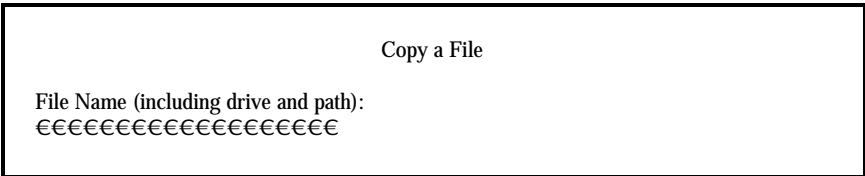
I.2. Delete a File

Delete files only when instructed to do so by your RO support person. You are prompted to enter the name of the file you wish to delete.

Instructions are also included in Appendix 1 - Use of DOS.

I.3. Display Directory

Viewing a "DOS directory" is a valuable troubleshooting tool. Use it



under the direction of your RO support person to determine if all correct files are present in a directory, when a certain file was created and at what time, whether the size of the file is large enough to contain the expected data, or what is the exact name of a file that is to be copied or deleted.

Select DISPLAY DIRECTORY, when directed by your RO. Instructions are included in section B.1. of this chapter as well as Appendix 1 - Use of DOS.

Your computer operates using the "C:" drive. Specify otherwise only at the direction of your RO.

To view a directory of a diskette in drive A respond to the prompt by typing "A:" followed by <Enter>.

I.3. Display Directory, *Continued*

- a. If the specified directory cannot be found (or is empty), a message is displayed telling you that it is either an invalid directory or that no files are found.
- b. If files are found in the directory, they are displayed on the screen. The list includes the name of each file, its date and time of creation, and its size in bytes.
- c. Up to 19 files can be displayed on the screen at once. If there are more than 19, you will know because the final line of the directory listing shows the total number of files and the total bytes (size). You can compare the number in the total to the number of files displayed on the screen.
- d. If there are additional files to be displayed, press any key to see the additional files.

Press any key to exit back to the DOS Functions Menu.

I.4. Formatting a Disk

Some new diskettes must be formatted in preparation to record and store data. Usually, this is already done by the RO before the diskettes are sent to you. Many diskettes now are already formatted.

NOTE: Before formatting a diskette, check to make sure it does not contain any files that you should keep.

... To check the contents of a diskette,

- Select DOS DISPLAY DIRECTORY option,
- Specify A: as the directory to be viewed.

... Select **Format Floppy Disk**. You are instructed to place the diskette in the drive and press <Enter> to continue.

I.4. Formatting a Disk, *Continued*

- ... When formatting is complete, you are asked if you want to name the volume. Press <Enter> to continue.
- ... You are asked whether you want to format another diskette.
 - If YES, press "Y" and <Enter> and follow the prompts on the screen.
 - If NO, press "N" and <Enter>.
- ... You will then be prompted to "press any key to continue". You are returned to the DOS Functions Menu.
- ... To return to the System Functions Menu, press <Enter>.

I.5. Check Hard Disk

When you select CHECK HARD DISK, the results, in summary form, appear on the screen.

Figure 8-5
HARD DISK SUMMARY SCREEN

```
85800960 bytes total disk space
 73728 bytes in 4 hidden files
 55296 bytes in 21 directories
10604544 bytes in 279 user files
75067392 bytes available on disk

    2048 bytes in each allocation unit
   41895 total allocation units on disk
   36654 available allocation units on disk

655360 bytes total memory
246624 bytes free

Press any key to continue...
```

This information is useful to determine the amount of storage space on your hard drive, whether part of the drive is damaged, and/or unavailable due to the presence of bad allocation units.

If you are requested to check the hard disk during troubleshooting, report these summary numbers to your RO. They will use them to help diagnose your computer's problems. Some problems you experience are a result of bad allocation units. Sometimes you are simply out of space on the hard drive. therefore, files cannot be installed on your hard drive.

I.6. Exit to Dos

Exit to DOS is password-protected. You may only use this option with assistance from the regional office or an SFR. This option is only used to help diagnose laptop problems when the laptop is in the possession of either your RO or a technically-knowledgeable SFR.

PART D - NHIS

CHAPTER 9. TROUBLESHOOTING AND GETTING HELP

	<u>Page</u>
A. Introduction	D9-1
B. Defining a Computer Problem: Attentive Observation	D9-1
C. Computer Problems During an Interview	D9-4
D. Warm Boot and Cold Boot as Troubleshooting Methods	D9-5
1. Warm Boot	D9-6
2. Cold Boot	D9-7
E. Hardware Failures and Exchange Procedures	D9-7
F. Software Problems and Replacements	D9-8
G. Telecommunications Troubleshooting	D9-9
H. Where to Turn for More Help	D9-10

PART D - NHIS

CHAPTER 9. TROUBLESHOOTING AND GETTING HELP

A. Introduction

The key to successful troubleshooting is determining the cause of the problem. There are three main types of problems you may encounter while working on a CAPI survey:

software (the instrument or case management does not operate correctly)

hardware (the laptop computer is having mechanical troubles)

transmission (the modem, communication lines or HQ computers are not working)

You can help determine a the computer problem by recording what you were doing and what the computer did when you encountered the problem.

B. Defining A Computer Problem: Attentive Observation

Solving a computer problem requires some very specific types of information. As the user, you can provide information about your laptop computer that may help resolve the problem.

When something does not work as expected try it again. Go ahead. This may produce the correct results, thereby solving the problem.

Re-entering the same response, or re-pressing the same key, and sometimes turning the machine off and on (rebooting) will often correct the problem. Usually when something doesn't work, the machine will beep and an error message is displayed on the screen.

If the problem persists, do not randomly press keys or handle the computer roughly (DO NOT give it a kick).

**B. Defining A
Computer
Problem:
Attentive
Observation,
Continued**

Write down whatever you can about the circumstances leading up to the problem, the computer's behavior, and any error messages that were displayed. Small details are crucial.

After making a few notes, try to cause the same problem again by repeating the procedure that triggered it. It helps to determine if it was an isolated incident or if the problem is widespread. Prevalent problems will require RO or HQ support.

As you go through this scenario, attempt to answer each of the following questions about the problem:

1. Doing what: What were you attempting to do when the problem occurred? For example:

- ! typing the abbreviation for a state during an interview
- ! making a telecommunications transmission
- ! editing an address in case management

2. Program and screen: Which program were you using, and what screen were you on when the problem occurred? For example:

- ! appointment screen in the interview program
- ! system functions menu
- ! case management sort options menu
- ! telecommunications menu

If a problem occurs within the questionnaire, write down the exact screen name displayed in the upper left corner of the screen.

**B. Defining A
Computer
Problem:
Attentive
Observation,
Continued**

3. Behavior of the equipment: In what way did the computer behave abnormally? What happened that wasn't right? For example:
 - ! screen went dark
 - ! error message #142 displayed on screen
 - ! computer beeps and does not accept characters typed on the keyboard

4. Abnormal conditions: Were there any abnormal conditions that led up to this problem? For example:
 - ! computer got wet
 - ! slid off the table and fell to the floor
 - ! was plugged in during an electrical storm

5. Already done: What have you already done to try to solve the problem? What were the results? For example:
 - ! tried other, related function keys
 - ! exited the interview and went back in
 - ! turned off the computer and started over from the login screen
 - ! checked all connections and made sure everything was hooked-up correctly and securely

This information helps the support person refrain from telling you to do things that you've already tried.

When you have the answers to these questions (or most of them), you are more likely to provide the RO with the types of information needed to solve your problem.

C. Computer Problems During An Interview

What to do if computer troubles happen during a telephone or personal visit interview.

1. TRY AGAIN: Do the same procedure again and follow the instructions exactly.
2. BACK STEP AND TRY AGAIN: Go back to the previous screen and then forward again. Or you could exit the interview completely, and re-select the same case on the case list and begin the interview again.
3. EXPLAIN TO THE PERSONAL INTERVIEW RESPONDENT: Explain that you are having technical difficulties and make whatever additional efforts you can to solve the problem. **Do not** accept assistance from household members.
4. TELEPHONE FOR HELP: Telephone your RO for help. If you are using a respondent's phone, use a credit card or call collect. Otherwise, excuse yourself and call from a pay telephone. Ask the respondent if you may return later in the day or telephone in the evening to finish the interview. Obtain a telephone number.
5. REMAIN CALM AND POSITIVE: Assure the respondent that you will resolve the problem with help from your supervisor. Always convey the expectation that you will complete the interview later when it is convenient for the respondent..
6. DON'T TRY TO FINISH ON PAPER: **Do not** attempt to take notes on paper to complete the interview. Without the instrument, you may miss skip patterns and ask the wrong questions. Set up a callback to complete the interview when it is convenient for the respondent.

**D. Warm Boot
And Cold Boot
As Trouble-
Shooting
Methods**

Two terms are commonly used to refer to re-starting the computer:

Warm Boot - restarting the computer while the power is still on

Cold Boot - restarting the computer after turning the power off

Certain temporary problems can be overcome by re-starting the machine.

Backing out and re-trying the procedure is a useful strategy, but if the screen display freezes up or the computer does not respond to any keyboard entries there is little else you can do but re-boot.

DO NOT turn off or re-boot the computer while you are in the interview program (instrument). Doing so will lose data entries made since your last save. However, if the computer does not respond to anything else, re-booting may be the only thing left to do.

Under these circumstances, try a "warm boot" first. If that does not work, turn off the machine and do a "cold boot".

D.1 Warm Boot

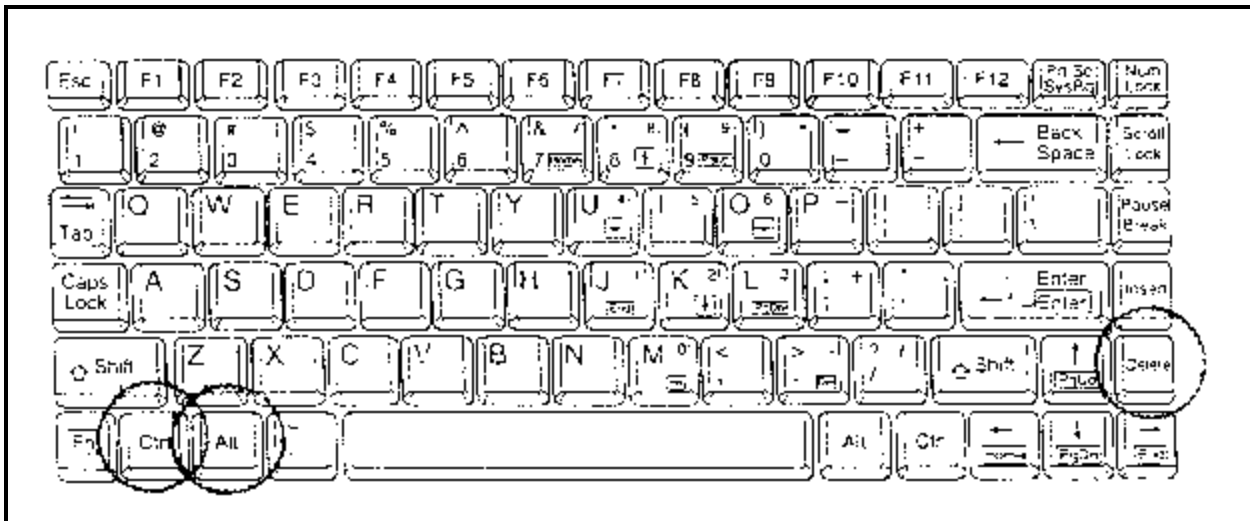
TO DO A WARM BOOT, hold down the following combination of keys:

<CTRL> + <ALT> and then press <DELETE>

This procedure is sometimes referred to as CONTROL-ALT-DELETE.

This empties the computer's working memory and forces it to start from scratch. The location of the keys may vary from one laptop to another.

Figure 9-1
WARM BOOT KEYS



After a warm boot, wait for the computer to do the self-tests and load the software. Enter your password and continue as if you had just turned on the computer. The computer may now behave normally. Even if it doesn't, an error message may appear that will help to diagnose the problem.

D.2 Cold Boot

TRY A "COLD BOOT",IF THE COMPUTER STILL DOES NOT RESPOND.

Turn off the power switch.

WAIT 30 seconds.

Turn the power back on.

Waiting 30 seconds to turn the computer back on is very important. This keeps the hard disk from being damaged. Think of the a record or compact disk, that needs to stop spinning before you can re-start it or remove it from the stereo. The computer's hard disk is very much like a compact disk and needs to come to a complete stop before re-starting it or the hard disk may get damaged.

The computer may behave normally now. If not, write down notes about what happened and call the RO for help.

E. Hardware Failures And Exchange Procedures

If you experience an equipment failure which is serious enough to prevent you from continuing your work, report the problem to your regional office staff. You may be instructed to ship the malfunctioning component (your computer, its removable hard drive, the battery charger and battery, or the modem) back to the office for exchange. If so, a replacement will be sent to you by overnight delivery.

For those who live near an RO, an in-person exchange of the equipment at the office may be more efficient. Regardless of the exchange method, repairs are always handled by the office. **Do not contact a computer repair service yourself.**

1. USE THE SAME BOX: When shipping any equipment back to the RO, always use the original box and all its internal packing material. (If you only need to send in the battery charger or hard drive, use a smaller box and pack it securely.) Your office will also give you instructions about which delivery service to use.

**E. Hardware
Failures And
Exchange
Procedures,
*Continued***

2. HOW TO RETURN COMPUTER ACCESSORIES: When some other piece of equipment fails, send only that part to the RO. Do not use the computer or modem box for shipping other items. For cables or battery packs, use a padded envelope. To ship a battery charger with battery or hard drive, use a roomy box and fill ALL sides with styrofoam chips, bubble wrap, or crumpled newspaper.
3. DON'T TRY TO FIX IT YOURSELF: NEVER disassemble any computer or modem equipment when attempting to solve hardware problems. Not only will you void the warranty, but you may further damage the equipment and you may risk getting a shock from the power supply.

**F. Software
Problems And
Replacements**

If, when working with the RO staff, you determine that there is a defect in a software program on your computer, one of three things may happen.

1. WORK AROUND THE PROBLEM: If the problem doesn't prevent basic interviewing, you may be instructed in how to "work around" the problem until the software can be replaced.
2. GET A CLEAN COPY OF THE PROGRAM: If it appears that your software has become damaged, a fresh copy of it can be sent to you on a disk or via telecommunications. If you are instructed to install the new copy of the software when it arrives, follow the INSTALL SOFTWARE instructions in Part D, Chapter 7, section C.
3. EVERYONE GETS A NEW VERSION: If the software problem is serious and widespread, it may require that a new version of the software be distributed to all FRs. If this happens, you will be notified of the new release and told when to install it. When the appropriate time comes, follow the INSTALL SOFTWARE instructions in Part D, Chapter 7, section C.

G. Telecommunications Troubleshooting

Telecommunications is the process of transmitting and receiving computer files over telephone lines. Transmissions are dependent not only on hardware and software working correctly, but also on the stability of the connections between computers, modems, and telephone lines.

Telecommunication connections, therefore, may be more fragile than other parts of your CAPI system.

1. CABLE CONNECTIONS ARE CRITICAL: Check ALL physical connections to make sure nothing is loose or disconnected.

Figure 4-3 in Chapter 4 shows the equipment setup and cable connections required for making a transmission. Half of the time failures occur due to a loose or non-existent connection.

2. IF YOUR SCHEDULED TRANSMISSION FAILED: If you discover that your overnight transmission was not successful, call the RO first thing in the morning, then try an immediate transmission. It's important that all interview data be processed daily, so don't disconnect everything unless you are told that a transmission is impossible at this time (due to a computer failure at HQ, for example).
3. TRY AGAIN WITH CAREFUL OBSERVATION: Try the transmission again, making certain that you are following the instructions. Observe what happens at every step along the way. Following this attempt, call the office to make sure your transmission succeeded or to get more assistance.
4. IF THE COMPUTER WAS TURNED OFF DURING THE WAITING PERIOD: The computer must be running continuously while waiting to make a transmission. Turning it off or re-booting the computer will result in a lost transmission setup. If this happens, you must transmit again.

**G. Telecommu-
nications Trouble-
Shooting,
*Continued***

5. TO CANCEL A TRANSMISSION: Occasionally you may discover, that you need to use the computer when you already have it setup to make a transmission. For instance, a respondent may call and you might need to take a last-minute interview. If this occurs, you can cancel the transmission by pressing ESC.
6. BEFORE CALLING YOUR RO: Having the answers to the following questions helps the staff at the RO assist you.
 - a. What does the screen say? What screen are you on? Are there any related error messages?
 - b. How did you get here? What steps did you follow and can you do it again **with the same results**?
 - c. What did you do **next**? How did **you** attempt to solve the problem?
 - d. What **can** you do? Can you go forward, back or around to problem area?

**H. Where To
Turn For More
Help**

A network of support has been set up to assist you with your computer and all phases of your work. A local Supervisory Field Representative (SFR) may have more experience with the computer than you have and may be able to answer some of your questions. The survey staff in the RO has had additional training and can be of help with procedures and troubleshooting.

The RO staff can obtain advice from their Regional Office Computer Specialist to assist in the more technically-oriented hardware problems. Finally, Headquarters has set up a Support Desk that assists the RO staff in answering any questions with which they may be having trouble.

Notes

PART D - NHIS

**GENERAL PROCEDURES FOR COMPUTER-ASSISTED
INTERVIEWING APPENDICES**

	<u>Page</u>
D.1-1 Use of the Disk Operating System	Appendix D.A1-1
D.2-1 Computer Care and Background Information	Appendix D.2-1
D.3-1 HIS CAPI Valid Outcome Codes	Appendix D.3-1

PART D

APPENDIX 1. USE OF THE DISK OPERATING SYSTEM (DOS)

Your laptop computer contains several **APPLICATION PROGRAMS**. Each performs a specific set of functions such as case management, data collection, or data transmission via telecommunications. In addition to its application programs, a computer contains an **OPERATING SYSTEM**. This provides the environment in which the application programs run. The operating system on your laptop computer is called the Disk Operating System (**DOS**).

For the most part, your application programs are menu-driven. This means that you make selections from a list or menu, rather than type the instructions or "commands" directly into the computer. Therefore, it is rare that you will find it necessary to use DOS commands.

If necessary, you may do so **only under the direction of the Regional Office**. To insure the integrity of the CAPI system you are working with, access to the DOS prompt, where you can issue commands, is password protected.

This appendix provides an introduction to basic DOS concepts and instructions for performing a few DOS functions, just in case you ever need them.

- A **PROMPT** is the computer's signal to you that it is ready for your next command. It appears on the screen just below the last line of text. Format may vary, but it usually ends with >.
- A **CURSOR** is the blinking box or underscore that shows you where the entries you are about to make on the screen will appear.
- You give a **COMMAND** by typing the name of a program or DOS function, which tells the computer what to do next.
- "**FOLLOWED BY <ENTER>**" instructs you to press the <Enter> key, so that the computer can begin to carry out your command. When entering text, it is equivalent to the carriage return on a typewriter. Whenever you see <Enter> in the instructions, press the key; **do not** type the word.
- A **BAD COMMAND OR FILENAME** message means that the computer can't find the file or command you tried to execute. Check for typing errors and make sure that you are in the correct directory.
- **Special keys**: Depressing the CTRL while simultaneously pressing an indicated letter or number key will modify the action of the other key.

The ALT key, like CTRL, is a "modifier" key that is held down while pressing another key.

F1, F2 The letter F plus a number up to 10 refers to your computer's special function keys, which are located at the top of the keyboard above the digits. Some of these keys are set up as one-touch commands, while others function in combination with CTRL, ALT, or SHIFT.

The arrow keys (6897) are used to move the cursor in the direction indicated by each arrow.

Some laptops use an FN key. This, in conjunction with the Enter or the arrow keys allow you to perform more functions, such as Page Up and Page Down or move to the front or end of a document. This key is often found on laptop keyboards because the keyboard is not full-size and cannot accommodate additional keys. It is mainly used in word processing.

- A **DEVICE** includes such things as your modem, the AC adapter and any other equipment with which the computer interacts, as well as your computer's hard disk or its floppy disk drive. Your **HARD DISK** is named "C:" and your **FLOPPY DISK DRIVE** is named "A:". A **colon** always follows these drive names.
- Files on a diskette are organized into sub-lists known as **DIRECTORIES**. These may contain (in addition to program, data, and text files) one or more additional **SUB-DIRECTORIES**.
- Each file that is stored on a diskette has its own unique **FILENAME**. A **FILENAME**

consists of up to 8 characters, which may be followed by a period and a **FILE EXTENSION** of up to 3 characters indicating the type of file.

- **PROGRAM (EXE)** files contain instructions to be executed by the computer when the program is run.
- **DATA (DAT)** files contain a sequence of digits, words, or other material that programs accept as **INPUT** or generate as **OUTPUT**.
- **TEXT (TXT)** files contain ordinary prose, the format is determined by the program that created the file (for example, Word Perfect).

Examples of **FILENAMES**:

LETRHOME.TXT is a document;
MIGGLE.EXE is a program;
SURVEY.DAT is a data file.

- When typing the name of a file, you also enter the appropriate **PATH**. While working in the directory where the file is located, you may be instructed to use a shortened version of its name (filename plus extension). However, if the file is in another directory or on another drive, you must specify the drive name the directory path (with any applicable sub-directories) and the filename with extension.

Example of **PATH**:

C:\DATA\DAY1\FILE001.DAT refers to a data file named FILE001.DAT located in sub-directory DAY1 under directory DATA on drive C:.

- Use a **BACKSLASH (\)** to separate the names of all directories and sub-directories. This key is located on the top row of letters under the backspace key. It is **NOT** interchangeable with the front slash on the same key as the question mark.
- A **HARD DISK** may also be called a fixed disk or internal disk. Its magnetic storage surfaces are on a disk that is either built into the computer or contained within a removable cartridge. If a cartridge is used, the user can remove the hard drive.

However, **do not** alter the directory structure on the **HARD DISK**.

- The **FLOPPY DISK DRIVE** of your computer accepts diskettes as you insert and remove them. It can either be internal, built into the computer, or attachable via a cable.

The floppy diskettes that are inserted into the floppy disk drive are magnetic storage apparatuses that contain a disk inside a small, square, hard cover. Like the removable hard disk cartridge, these floppy diskettes can easily be removed from the floppy disk drive.

Be careful when **INSERTING DISKETTES** into the **FLOPPY DISK DRIVE** that the label is facing up and an arrow appears in the upper left hand

corner. Do not insert or remove a diskette when the "drive in operation" light is lit. Do not expose diskettes to excessive heat or physical abuse. Put diskettes away in a safe place when not in use--never on or near an electrical device (television, computer, telephone, airport scanner) that emits magnetic fields as these will erase the diskette.

The DOS prompt indicates the drive the computer is currently using. To **CHANGE TO A DIFFERENT DRIVE**, type the drive name followed by a colon and press <Enter>.

Examples: C: <Enter> or A: <Enter>.

DRIVE NOT READY message will appear if you try to change to drive A: and there isn't a diskette in the drive, the diskette is inserted incorrectly, or the drive is not properly closed.

- The DOS command **TO CHANGE TO A DIFFERENT DIRECTORY** is **CD** followed by a backslash (\) and the name of the directory you want to go to. For example, CD\DATA takes you to the DATA subdirectory of the current drive. These entries will be specified by the RO if you need them.
- **TO VIEW A DIRECTORY** of all files in a directory, as directed by your RO, use the DOS command **DIR**. When used with the name of a drive and a directory structure, the DIR command can display other directories.

For example:

```
DIR C:\DATA <Enter>.
```

Use **DIR/P** to view the directory contents one page at a time.

Use **DIR/W** to display the list of a directory across the page in several columns. However, you will only see the file and subdirectory name. The size and date of each file will not be displayed.

- In each DOS command, **USE THE SPACE BAR** to enter a blank space between the command and the file information following it. Do not put in any blank spaces unless specified.

Examples of **SPACING**:

```
DIR A:\DIREC\SUBDIREC\FILENAME.EXT  
TYPE B:THISFILE.DAT  
COPY C:\MEMOS\MEMO1.TXT
```

- **PERIODS** are used only to separate a filename from its extension.
- **TO FIND A SPECIFIC FILE**, include its full name in the directory command.

For example:

DIR C:\DATA\FILE2.DAT returns either a single directory entry (the one for FILE2.DAT), or an error message if the file is not in the C:\DATA directory.

When searching for a specific file in the current directory, omit the path.

For example: DIR FILE2.DAT.

- To **SEARCH FOR A GROUP OF FILES** whose names or extensions contain certain characters, use a **WILDCARD** character to replace the unspecified parts of the filename. To replace a single character use a ?, and a * to replace any number of characters.

Example of **? WILDCARD**:

DIR C:\DATA\MAY01??.DAT displays all files on the C drive, in the DATA directory, with **any last 2 characters in the name** and all other characters and the extension exactly as listed.

Example of *** WILDCARD**:

DIR A:QUERY*.* displays all files on the A drive whose names begin with QUERY, **end with any other characters (either none or up to three)**, and have any file extension (or none).

A **FILE NOT FOUND** message received in response to a DIR command means that no such file(s) is in the directory. Check to make sure you are looking in the correct directory, and that all spelling is correct.

- To **STOP A LIST FROM SCROLLING**, press PAUSE, or use the CTRL-S key combination. When using the SYSTEM FUNCTIONS menu pick, the directory is automatically displayed a page at a time.
- To **RESUME SCROLLING**, press <Enter>, CTRL-S, or CTRL-Q.

- To **EXECUTE (RUN) A PROGRAM** type the name of the program and press <Enter>. This is usually triggered automatically by other programs.
- **TO STOP A LONG LISTING OF A FILE OR DIRECTORY THAT WAS REQUESTED BY MISTAKE**, press CTRL-C. Avoid using this method in an interview or in case management, because such an exit damages certain data files.
- **TO RENAME A FILE**, use the RENAME (or just REN) command, followed by the old filename, a space, and then the new one. Do a directory listing after executing this command, to make sure it achieved the desired results. If you want to rename the file and put it in another directory, you must specify the directory path right before typing the new file name. Otherwise, the file stays in the directory you are currently in.
- **TO CLEAR THE SCREEN** use the CLS command. This erases the screen and returns a fresh prompt at the top of the screen.
- **TO TYPE A FILE** in order to see what's inside it, key in "type" plus the filename. Include the PATH (drive and directory information) if the file is not in the current directory.
- **TO CREATE SOME TEXT**, you can type directly from the keyboard into a file by giving the command COPY CON: followed by the filename and <Enter>. As you type, each line is placed into a file with

the specified name. To end typing and save the file, type CTRL-Z at the beginning of a new line. To quit and throw away the file, type CTRL-C. This file can be read (using TYPE, as above), transmitted via telecommunications, etc.

ANY OTHER QUESTIONS??? If you need more help, consult the user manuals that came with your computer, or contact your Regional Office.

PART D - NHIS

APPENDIX 2. COMPUTER CARE AND BACKGROUND INFORMATION

A. EXPOSURE TO ENVIRONMENTAL CONDITIONS

Due to the nature of your job, your computer may sometimes be exposed to extreme weather conditions. Your computer has been designed to resist adverse conditions to a large extent.

By taking reasonable precautions, you can prolong the life of the computer. Do not let rain or food and beverages fall directly into the open computer. Use your briefcase or computer tote bag to carry the computer outdoors.

Whenever possible, give the computer a few moments to achieve room temperature when using it after storage in temperatures over 100 degrees or below freezing. To lengthen its life-span, avoid leaving the computer for extended periods in direct sunlight or in very hot or cold temperatures.

B. ELECTRICAL STORMS

Large voltage surges, which may occur in the electrical or telephone wires of your house, can cause major damage to computer equipment. To avoid such damage, run the machine on battery power if storms are nearby.

Charge batteries using the separate charger.

Unplug your modem from the electrical outlets and the telephone jacks when it's not in use. If particularly severe electrical storms are predicted, request permission to make your data transmission early, or to wait until morning.

Any type of power surge or drop can affect the operation of your computer. Protection is available through the use of a surge protector. However, in the event of a nearby lightning strike, even a surge protector is not enough. Leaving electrical equipment unplugged during storms is safest.

If damage does occur to the laptop or the battery charger, any battery that was in either machine at the time of failure should be kept and returned with the machine.

C. CLEANING

To clean the screen of your computer, wipe it gently with a soft cloth. You may dampen **the cloth** very slightly. Never spray a cleaner of any type directly onto the computer. **Don't use** abrasives, waxes, or any other chemicals that could damage the plastic case of the computer. **Never clean or touch the screen while the computer is on** as this may result in a shock to the laptop and you.

D. COMPUTER SECURITY AND PERSONAL SAFETY

1. **TO AVOID THEFT OF THE COMPUTER:** Do not leave the computer unattended in public places. Do not leave it in view in an unoccupied car. When staying in a hotel, lock the machine in your suitcase, or at least put it out of sight in your room. Generally, treat it with the same level of care you would give to a pocketbook or a briefcase full of important papers.
2. **WHAT ABOUT ON THE STREET?** There is no indication from previous research that carrying a computer increases the risk of robbery or assault. While the computer has considerable value, this is not apparent to people on the street, provided that you carry it in your briefcase, with the Census Bureau logo facing towards you.

3. PROTECTING CONFIDENTIAL DATA WITH A PASSWORD: Your personal password is one form of protection necessary because of the confidential data contained in the computer. Your Case Management Program is run automatically, whenever the computer is turned on. The password is required before anything more can be done. You will be required to change your password each month.
4. SELECTING A PASSWORD: When you choose your new password each month, avoid common English words. A password can consist of any combination of letters and numbers as long as the total number of characters equals 8.

An ideal password is a totally obscure mixture of numbers and letters, but you might also use fragments of several words, or one badly misspelled word. For example, try to think up a really unusual word (a foreign one, perhaps?), then misspell it or rearrange the letters, and finally throw in a digit or two someplace for extra security.

Memorize your password! Never write a password down. You must conscientiously remember this password, but after you type it a few times this should not be a problem.

If you ever find yourself in the awkward position of having forgotten your password, call your RO for assistance.

5. OTHER SECURITY MEASURES: Never let others use the computer for other work or play. Never use diskettes not provided by the Census Bureau. Do not even place such diskettes in your computer's floppy disk drive, since they could contaminate the computer with a "**virus**" (a computer program that damages other files).

Computers have the potential for greatly increased data security compared to paper forms scattered over the dining room table, but only if they are used with care.

6. **A SERIOUS WARNING:** **Never attempt to alter anything in your computer.** Computer-assisted interviewing cannot succeed unless all FRs have identical questionnaires on their computers. If anything is altered or other software installed, your questionnaire and case management software may not be able to run.
7. **SPECIFIC RULES:** Do not attempt to make any changes to your computer. Such actions may be cause for dismissal.
8. **SOFTWARE UPGRADES:** If you have suggestions for improvements, send them to your supervisor with a request to forward them to HQ. This way, improvements can be provided to all FRs at the same time.

E. SOME BACKGROUND INFORMATION

Occasionally respondents or household members are curious about the laptop computer.

If you find that a respondent asks, refer to your user manual to provide information such as the name of the computer and where it comes from, the type of processor (either 386 or 486), the amount of working memory, the amount of hard disk storage, the weight of the machine, etc.

PART D - NHIS
APPENDIX 3. HIS CAPI VALID OUTCOME CODES

OUTCOME CODE	DESCRIPTION
200	New case, not started
201	Complete interview
202	Accessed instrument, no progress
203	Partial interview, no follow-up
204	Partial interview, follow-up needed
213	Language problem
216	No one home, repeated calls
217	Temporarily absent, no follow-up
218	Refused
219	Other Type A
220	Temporarily absent, follow possible
223	Occupied entirely by Armed Forces members
225	Occupied entirely by persons with URE
226	Vacant, nonseasonal
228	Unfit or to be demolished
229	Under construction, not ready
230	Converted to temporary business or storage
231	Unoccupied site for mobile home, trailer, or tent
232	Permit granted, construction not started
233	Other Type B
235	Vacant, seasonal
236	Occupied - screened out by household
240	Demolished
241	House or trailer moved
242	Outside segment boundaries
243	Converted to permanent business or storage
244	Merged
245	Condemned
246	Built after 4/1/1990
247	Unused line of listing sheet
248	Other Type C

PART D APPENDIX 4 FISH/HUNT VALID CATI (Telephone Center) OUTCOME CODES
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- 01 Fully complete interview
- 02 Other complete interview - No one in hh in sample
- 05 Detail - Includes a Type Z, no more follow-up
- 07 Detail - Sufficient Partial, no more follow-up
- 08 Deceased
- 09 Other Type C
- 12 Nonresidential number, mobile phone/fax/etc.
- 15 Non-working telephone number
- 17 Household moved in U.S. since last contact
- 18 type A; absent, ill, hospitalized
- 19 Physically or mentally unable
- 20 Unable to locate household
- 21 Unconvertible Language Barrier
- 22 Unpublished number or no listing of number
- 23 Only available number incorrect or problem dialing number
- 24 Other Type A
- 25 Hard of Hearing - no further followup
- 26 Entire sample moved - cases spawned
- 27 Wave 2 sample moved
- 28 Temporarily Absent
- 29 Other Type B
- 30 Hostile breakoff by individual-some data obtained
- 31 Refusal by individual, no data obtained
- 33 Refusal by household respondent-no data obtained
- 34 Refusal by nonhousehold member/spokesperson
- 40 Partial interview/breakoff with callback needed
- 41 Callback required/no interview progress on this call
- 47 Language problem/barrier, callback needed
- 48 Hard of hearing - callback needed
- 50 New number from Directory Assistance or recording
- 51 SEE LIST from Directory Assistance
- 52 New number from other source (i.e. previous residence)
- 53 Directory Assistance unable to confirm number
- 54 Directory Assistance confirmed number
- 55 Number not in service
- 56 Number changed. No new number given
- 57 Household unknown at correctly dialed number
- 59 Can't reach Directory Assistance

PART D
APPENDIX 4
FISH/HUNT VALID CATI (Telephone Center) OUTCOME CODES

- 60 Send to research
- 61 Case needs research
- 62 Called several research sources, but not all
- 63 Attempted all research sources, but have callbacks
- 64 Case researched, needs supervisory review
- 65 Case researched, need information entered
- 66 Case researched, number confirmed
- 70 Problem with information, put on supervisory hold
- 79 Confirmed Residential from Other Source
- 80 Ring no answer
- 81 Normal busy/circuits busy/FAX machine
- 82 Fast or WATS/FTS busy
- 83 Number could not be completed as dialed
- 84 No signal, funny signal
- 85 Bad connection
- 86 Number temporarily not in service, disconnected, out of order, or is being checked
- 87 Wrong number dialed or reached
- 88 Possible wrong number, household would not confirm
- 89 Voice mail, Answering machine/service, unknown status
- 90 Call not attempted now, send back to scheduler
- 91 Final code set by supervisor
- 92 Sent to supervisor hold by supervisor
- 93 Interviewer (type) changed by supervisor
- 94 Appointment date/time reset by supervisor
- 95 Case restarted by supervisor
- 96 Case activated by supervisor
- 97 Final code set by closeout program
- 98 System or instrument problem, case restored
- 99 System or instrument problem, alert Headqtrs
- 100 Case deleted - Duplicate
- 104 Late Mail Return
- 109 Hostile breakoff, type A
- 110 Hostile breakoff, type B
- 111 Refusal, type A
- 112 Refusal, type B
- 113 Other assessor noninterview, type A
- 114 Other assessor noninterview, type B