



Nirvana! Attaining Case Management Bliss

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What is Nirvana?

- An overarching control and case management system that supports RTI's survey data collection activities.
- A centralized database that is the backbone for
 - Telephone
 - Tracing
 - Self-Interviewing (Web) using RTI's Hatteras
 - Field
 - General Control System - used for tracking hardcopy documents, bio-specimens, etc.
 - Adaptive Total Design (ATD) and other management reports
 - A common portal, Symphony, for customized access

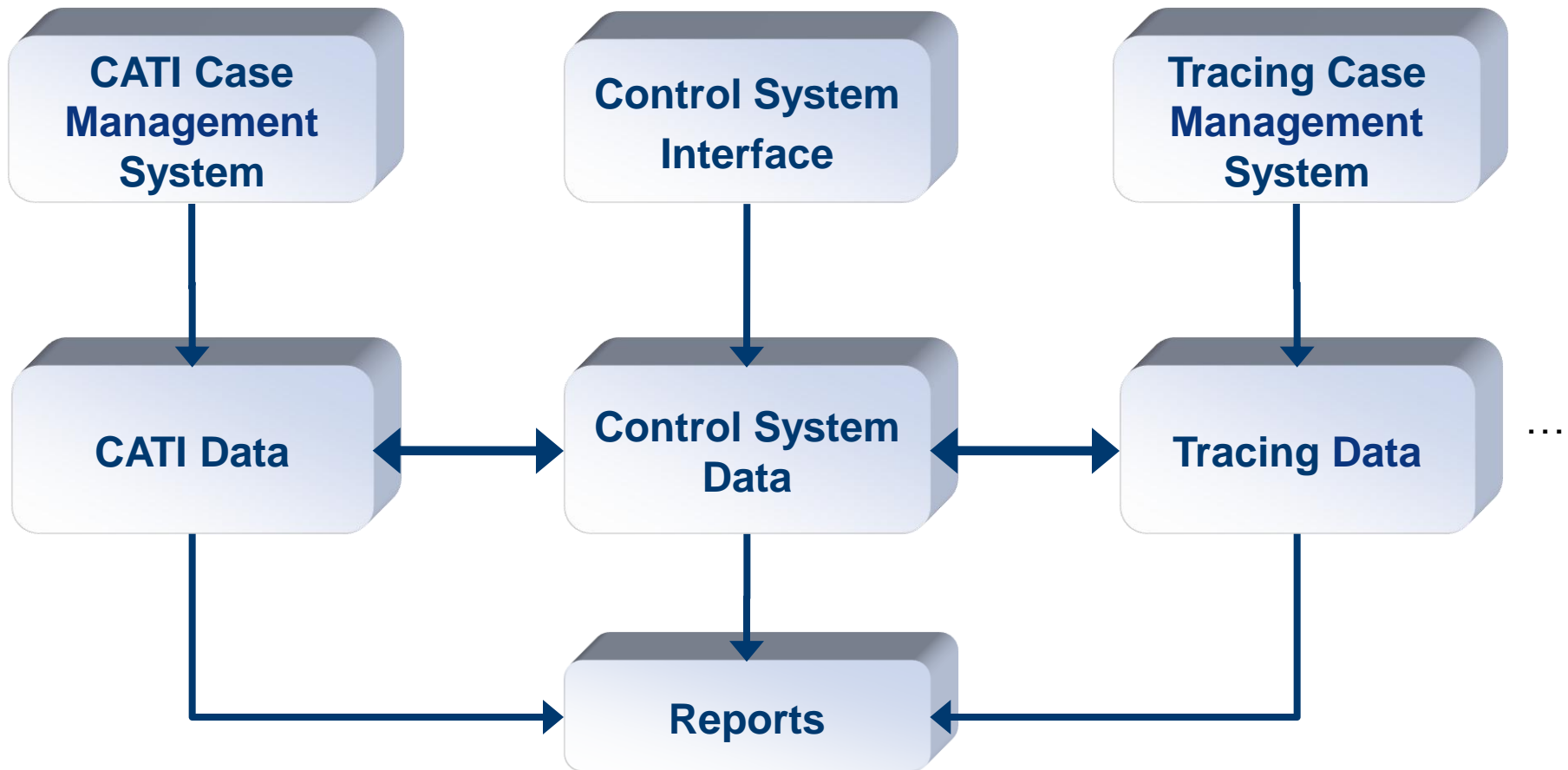
Background

- General Survey System Initiative (GSSI) was established to
 - Document the pain points experienced by survey managers, developers, programmers, and users
 - Look at the existing systems and processes
 - Evaluate COTS software for data collection
 - Consider process improvements
 - Develop solutions that address the issues and make RTI more efficient and cost-competitive

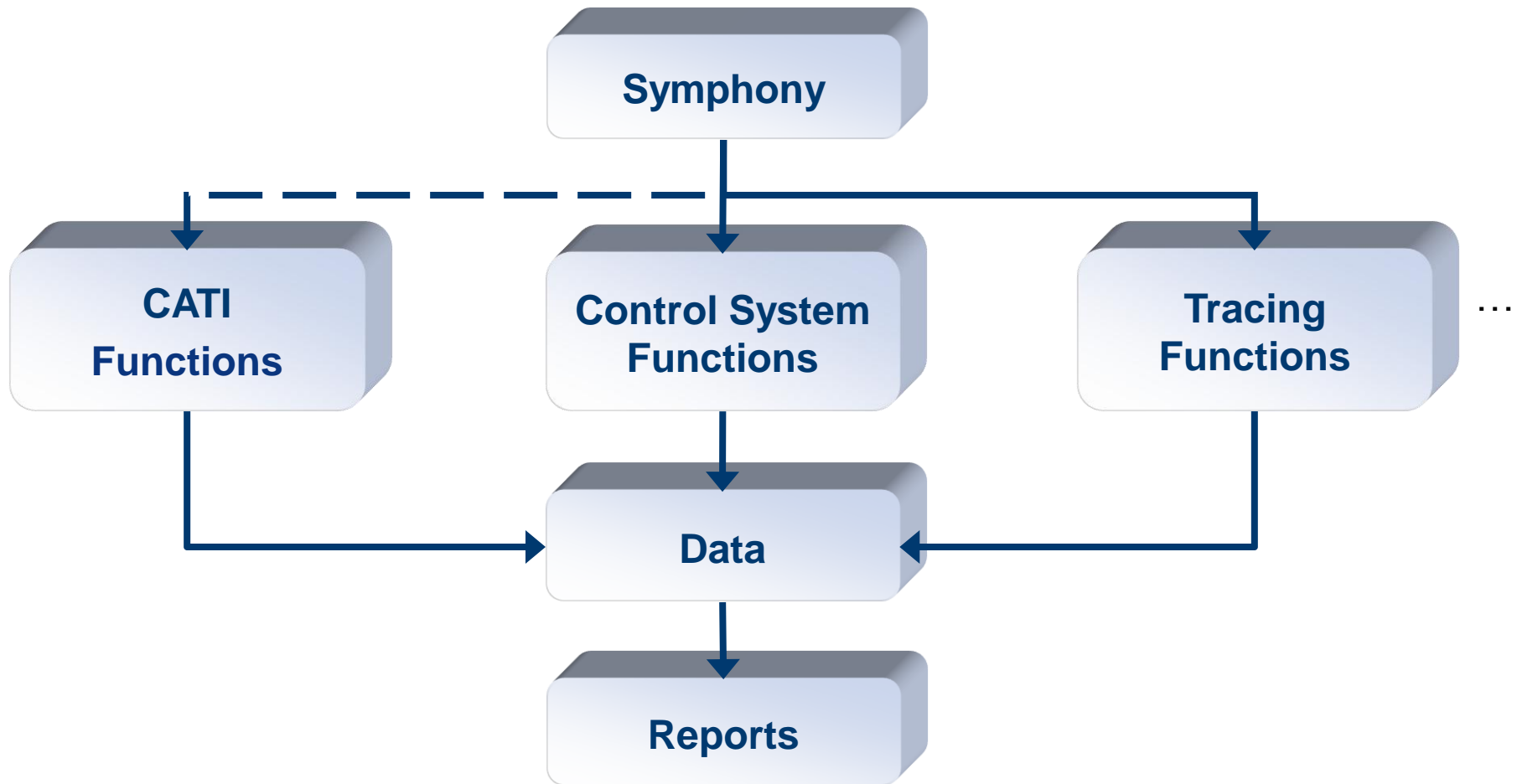
Background

- Several pain points related to separation of systems.
 - E.g., data movement between systems, reporting, agility, staffing

Key RTI Survey System Components Before Nirvana



Key Components of RTI's Systems for Surveys After Nirvana



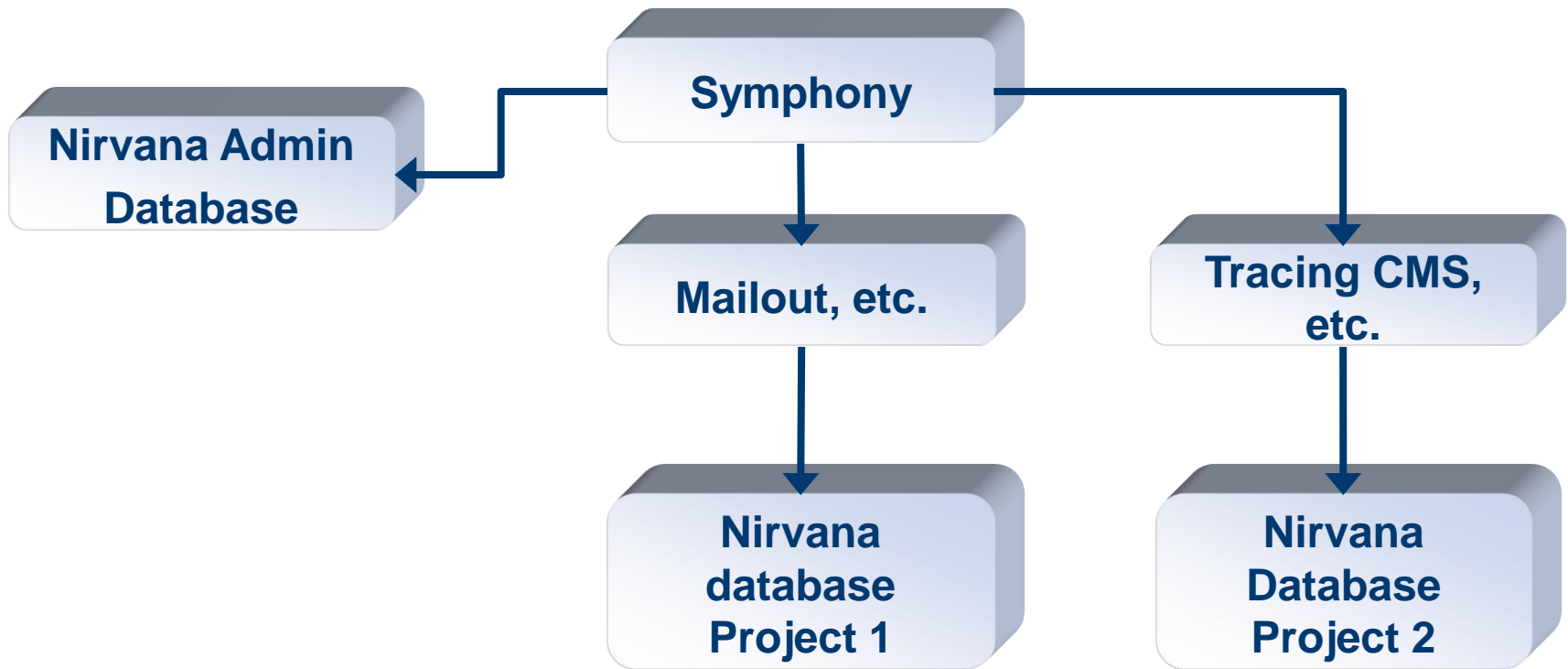
Architecture – Behind the Scenes

- Central Database
 - Define subject, contact info, etc., in a standard way
 - Across modes, contains all case/sample management info
 - Integrated case history across all modes and all modules
 - Consistent codes with clear mappings to AAPOR codes

Architecture – User View

- Symphony application portal:
 - Includes tools to define and administer Nirvana for the project
 - Includes traditional control system applications like Mailout, Receipt control, etc.
 - Launches existing applications such as Tracing CMS
 - Facilitates loading of the sample
 - Does automatic updates for easier maintenance
 - Controls access customized to the project and user's authorization

Architecture - Routing



Project, Stages, Status, and Events

- **Project:** the definition of a study
 - contains one or more stages
- **Stages:** major steps in work flow that need to be tracked
 - always has a single current status that can be reported.
 - statuses from multiple stages can be rolled up into an overall case-status
 - can be simple or complex (lead letter mailout, CATI)
 - can be sequential or concurrent (forms receipt & field DC)
 - Stages are linked together by *triggers*. Triggers are rules that cause a change in the status of a case, either within a stage or in a different stage

Project, Stages, Status, and Events

- **Status:** current state of a case within a stage
 - derived based on a new event and the prior status
 - can be affected by other flags or counters (too many calls)
- **Event:** something that happens to a case
 - can be a *system* event or one recorded by a *user*
 - may or may not cause a change in the status

Nirvana defines a **standard** set of events and statuses.

Nirvana offers **template** stages and triggers.

All can be **customized** to suit project needs.

Status of Development

Module	Deployment
General Control System - used for tracking hardcopy documents, bio-specimens, etc.	Nov 2010
Telephone	Mar 2011
Tracing	Mar 2011
Adaptive Total Design (ATD) and other management reports	Jul 2011
Field	Dec 2011

Benefits

- Actions of all types of interviewers hit the same database, including case management data
 - All events/calls in a single place regardless of mode
- Comprehensive reports across all modes can be created more easily
- Responsiveness & Efficiency
 - “Moving” cases between Tracing and CATI, CATI and Field, or Field and Tracing will be immediate and in the hands of survey management
 - Ex: hostile refusal from R -> all modes know without delay

Benefits

- Quality
 - Easier data management, less reconciliation
 - Can compare across studies that help us improve our processes and our proposals
 - How many calls are needed on average for this population?
 - Was batch tracing effective for this population?
- Staffing

Nirvana Team

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