
Mathematica's Integrated Survey Management System

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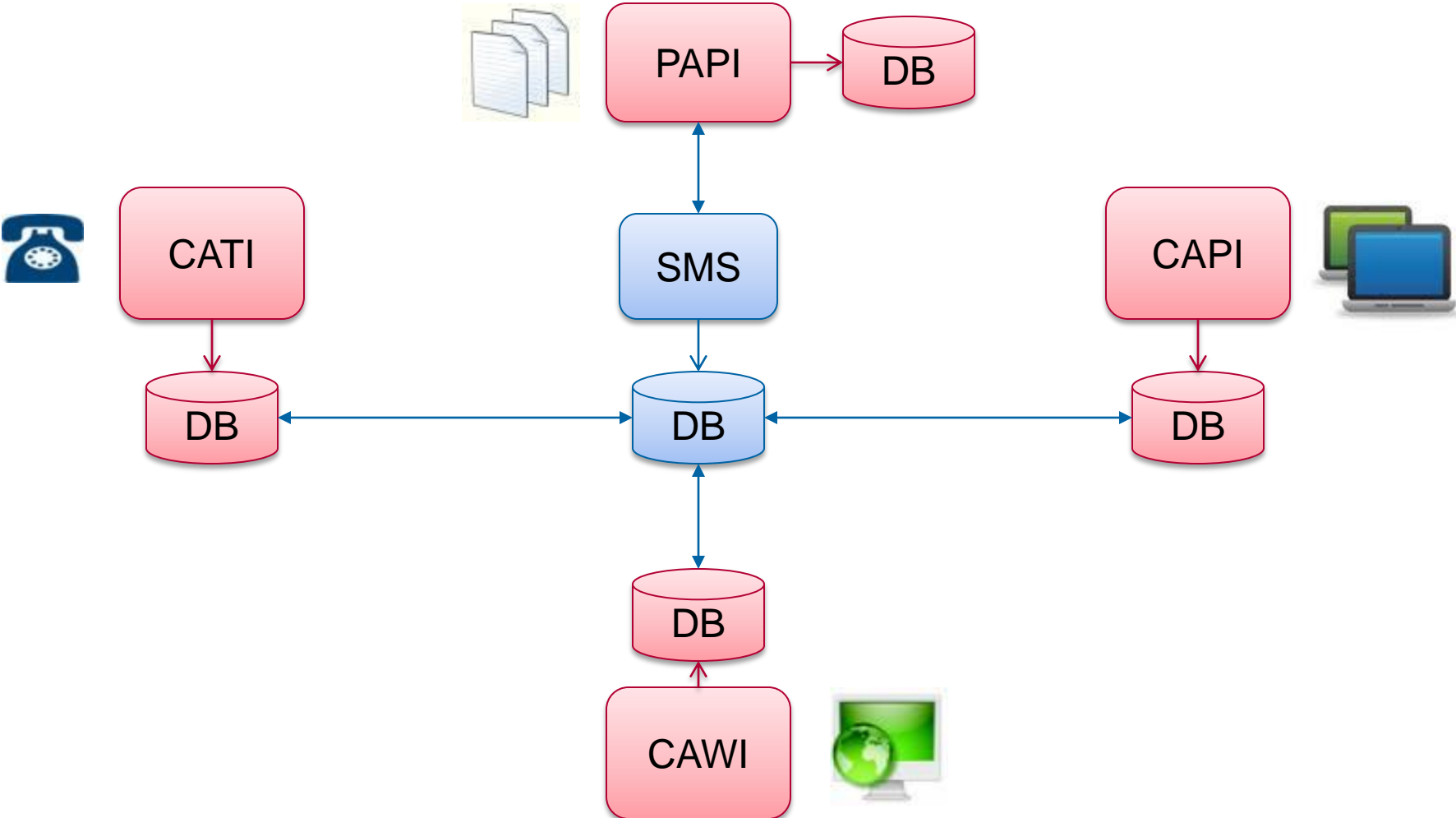
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Agenda

- **Background of our current system**
- **Benefits of our current system**
- **Disadvantages of our current system**
- **The new integrated solution (ISMS)**
- **Benefits of new integration**
- **Challenges encountered**
- **Progress and outlook**

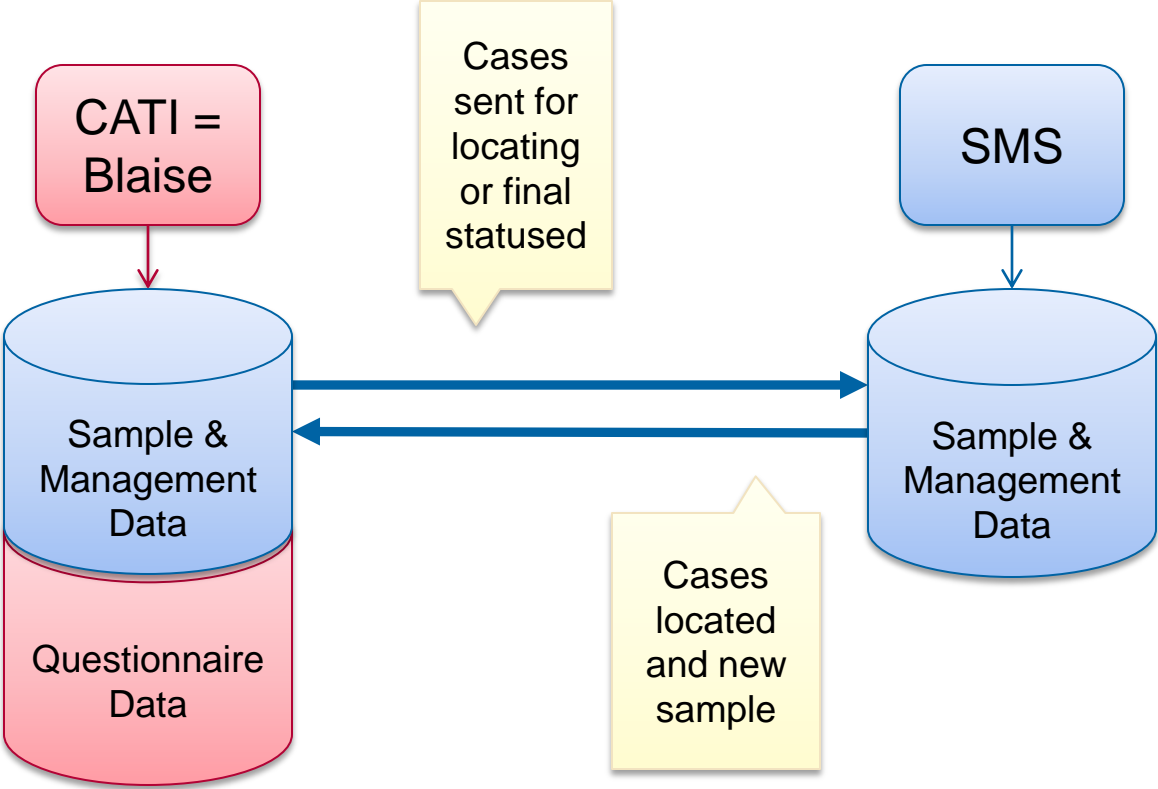
Background – Survey Management System (SMS)



Benefits of Current System

- **All respondent contact information is centrally maintained in one database**
- **All instrument statuses are centrally maintained in one database**
- **Reporting across multiple modes and instruments from one location**
- **Additional modes or instruments are added to the single SMS system**
- **Cases can move in and out of locating from CATI / CAPI**
- **Longitudinal projects = no problem**

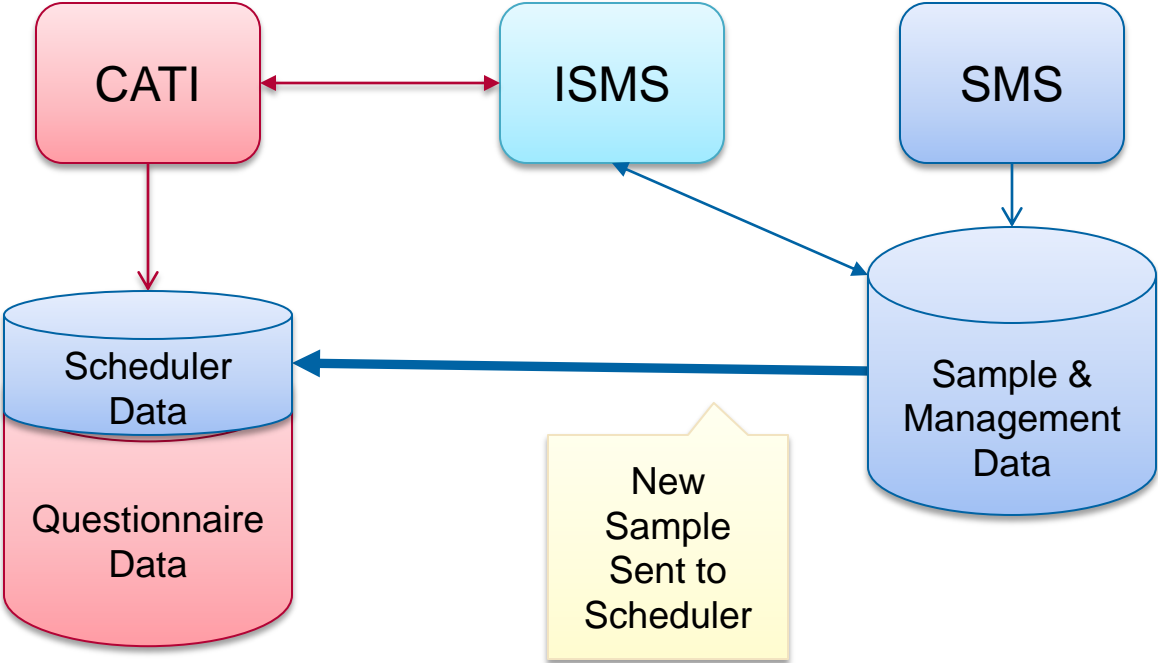
Overview of Current CATI / SMS Integration



Disadvantages of Current System

- **Blaise maintains its own copy of some contact data and status information**
 - Duplication of data
 - Synchronization issues can/will occur
 - Blaise is not a contact management application
- **Transfer of data occurs overnight, not in real time**
 - Round trip can take 2 full days
 - Problems during overnight can cause disruption of data collection the next day

New Integrated Solution (ISMS)



Benefits of New Integration (ISMS)

- **Most contact data stored in only one location**
- **Real-time access to the central data – no overnight sync required**
- **Cases will move from CATI to locating instantly**
- **Minimal duplication of data**
- **Minimal use of transfer files**

Challenges Encountered

- **Scheduler – could not be extracted from the instrument**
- **Determining best technology and architecture to pass data between applications and have maximum flexibility and customization**
- **Monitoring the load and stability of the infrastructure**
- **Creating an easy-to-use application that bridges two different systems and input styles**

Progress and Outlook

- **ISMS .NET application now has full access to Blaise case data and can update data elements that affect the scheduler**
- **Proof-of-concept successful**
- **Many case management screens are now implemented in .NET**
- **User acceptance testing ongoing**
- **On schedule for pilot in late fall 2012**

For More Information

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Questions?