

Section 14. Computer Assisted Self-Interview (CASI)

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14.1 Background

Computer Assisted Self-Interview (CASI) is a method for collecting information where a person reads questions on a computer screen and enters his or her answers directly into the computer. Many different types of electronic equipment (such as laptops, desktops, touch-screen computers or handheld devices) can be used to administer the CASI and various types of software can be used to design the data collection tool. For HPTN 084-01, the software used to design the survey is called Illume (by DatStat, Inc.).

14.2 Technical Requirements

Device

The HPTN 084-01 CASI questionnaires are web-based (using Illume software, supported by DatStat, Inc.) and can be taken from almost any device with a strong internet connection and a web browser. **Please review DatStat’s hardware and software requirements web page for more information:**

<http://academy.datstat.com/developer/illume-hardware-software-requirements/>

In the room where the computer is located, there should be an electrical outlet and a jack for broadband connection unless a reliable wireless connection is used. If possible, the computer should be plugged into an AC power source. If a laptop is used, it is recommended that an external mouse be connected to the laptop. To minimize problems with computers, sites should avoid having food or drink nearby and keep the area where the computer is used clutter-free. An antivirus program should also be installed on the computer.

Each site is responsible for addressing issues of computer security and privacy as well as general issues such as lighting, ergonomics, and overall participant comfort. For questions about how to use a computer, sites should refer to the operations manual of the desktop or laptop. Issues such as where the computer(s) will be located and who is in charge of addressing computer-related issues should be addressed in each site’s study specific Data Management Standard Operating Procedure (SOP).

Web Browser

The following list of web browsers can be used to administer the CASI in DatStat Illume.

- Google Chrome

- Mozilla Firefox
- Microsoft Edge
- Internet Explorer 10 or higher
- Safari

Make sure to always use the most current version of each browser to optimize the full capacity of the product's features and functionality. Please note: **JavaScript is required to be enabled on any browser that is used to access the platform's web interface.**

14.3 CASI Administration

The CASI will be administered to participants at many different visits. Participants are expected to complete each of the surveys. However, if the participant does not complete the survey (e.g., decides not to take it), this must be noted on the Behavioral Assessment CRF.

The questionnaire should **always be administered before any HIV/STD risk reduction counseling occurs** and the participant should complete the questionnaire in one sitting whenever possible. However, if a participant starts the survey at a regularly scheduled visit and must temporarily stop, the participant can resume taking the survey (see section 14.3.8) at a later time.

14.3.1 Survey URL

All surveys are accessed via a single URL provided by SCHARP. The link can be bookmarked in a web browser; however, ***desktop shortcuts to the survey should not be created***: using a desktop link to connect to the survey will result in the site always connecting to the version of the survey that was running when they originally created the link rather than the most current version of the survey. It is likely that the survey will need to be updated over time; using a desktop link or shortcut will result in the old version of the survey being administered.

Survey URL:

https://hptn.datstathost.com/Collector/Survey.aspx?Name=HPTN084_01_Questionnaire
&

14.3.2 CASI Practice for Site Staff

Staff members should be familiar with the content of the questionnaire in order to respond to participant questions. Staff members who will administer the survey should practice taking, and demonstrating how to use, the survey using test CASI Identification numbers (CASI IDs) provided by SCHARP. The staff member responsible for administering the CASI should be able to explain to the participant how to complete the survey, including how to use a computer and how to click through the questions using a mouse or touchpad.

14.3.3 Logging in to the CASI

When the participant is ready to begin the CASI, the staff member responsible for administering the survey will click on the appropriate URL. To find the surveys easily it is helpful to bookmark the URL you will be using in this study in your preferred web browser.

SCHARP will provide each site a list of CASI IDs in a link log to document the HPTN 084-01 PTIDs linked to each CASI ID.

Once the survey is opened, the staff member will enter a “CASI ID” from the list provided by SCHARP and the appropriate language and visit is selected. You will then be prompted to enter the PTID that is linked to the CASI ID.

Site staff will then answer one or more questions based on the visit; the answers to these questions will determine whether certain survey items will be included or excluded from the questionnaire.

Once these questions are answered, the participant is ready to take the survey on his or her own.

14.3.4 Navigating the Survey

Participants should navigate through the survey using the “previous” and “next” buttons that are part of the Illume software (**Figure 1**); they **should not** use the browser navigation buttons, which are the forward and back arrows usually located in the top left hand corner of the browser (**Figure 2**). If the browser navigation buttons are mistakenly used, proper functioning of the survey can be disrupted, and data may be lost.

If a participant asks for help while taking the survey it is OK for a staff member to assist the participant. For example if the Internet crashes, the survey freezes or the participant does not understand a question, it is OK for the site staff to help. For technical problems with Illume see Section 14.4.

Figure 1: Use the “Previous” and “Next” Buttons to Navigate Through the Survey

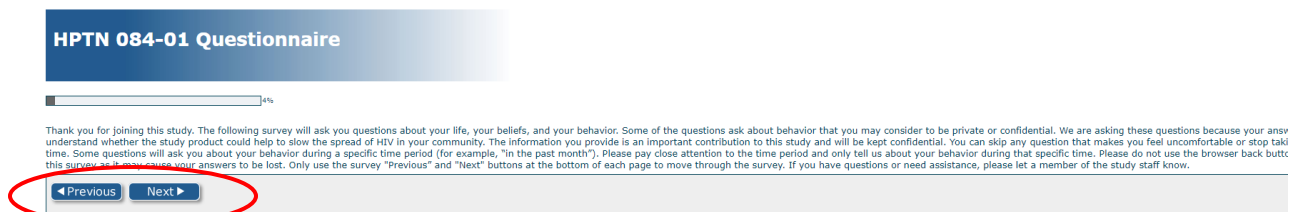
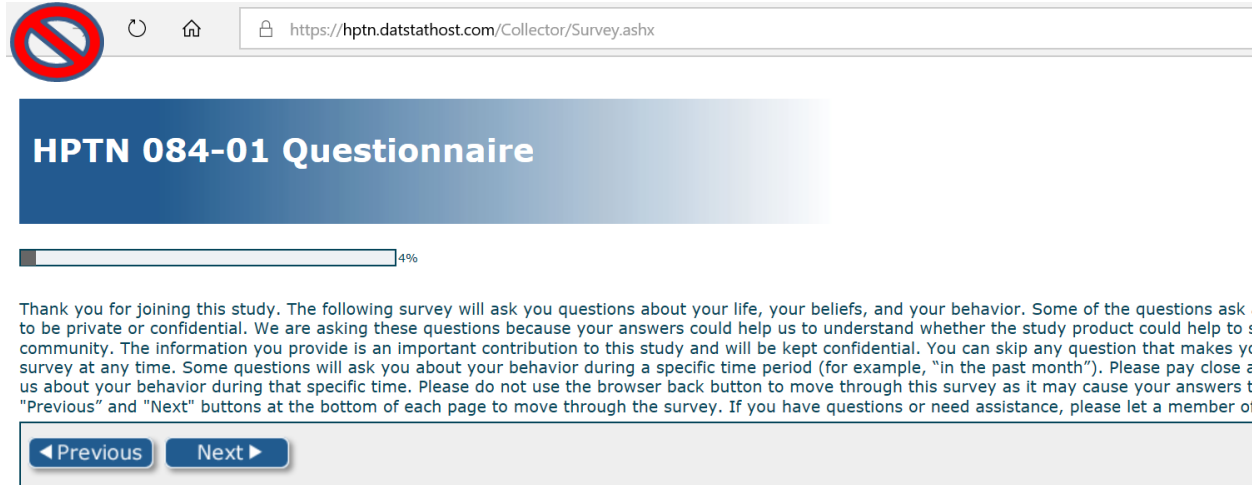


Figure 2: Do Not Use the Browser Navigation Buttons During The Survey



14.3.5 Graphical Interface of the CASI

Most of the questions in the survey are answered by clicking on radio buttons (**Figure 3**), which consist of a group of circular white dots. When the participant selects one of the circles, a dot appears in the middle of the circle. Some of the questions in the survey are answered by clicking on check boxes (**Figure 4**). When the participant clicks on the check box, a check appears in the box. For some questions, instructions will indicate whether more than one check box may be selected.

Some questions require participants to type in a number (**Figure 5**). Sometimes an “other, specify” box is included as one of the response categories in order to capture participant responses that do not fit into one of the categories listed. When a participant’s response does not match or fit into one of the listed response categories, the participant may select “other” and type in their answer in the space provided (**Figure 6**).

When training the participant how to use a computer and how to complete the survey, it can be helpful to point out the different ways they will be required to answer questions. There is also a brief (1-page) non-required section at the beginning of the survey for participants to practice entering responses, if desired.

Figure 3: Graphical Interface – Radio Buttons

HPTN 084-01 Questionnaire

6%

If you have any questions about how to complete these items, please ask a member of the study staff.

▶ How old are you?

17

▶ How many brothers and sisters do you have?

None

1 to 3 ←

4 or more

▶ Do you have any favorite colors? *Mark all that apply.*

- No, I do not have any favorite colors.
- Red
- Yellow
- Blue
- Green
- Orange
- Purple
- Black
- White
- Other

We will now start asking you the actual survey questions. Please press the 'Next' button to begin.

◀ Previous
Next ▶

HPTN 084-01 Questionnaire

15%

Here is a list of some things that other people do for us or give us that may be helpful or supportive.

▶ Please read each statement carefully and on a scale from 5 (meaning "As much as I would like") to 1 (meaning "Much less than I would like"), mark the response that is closest to your situation.

	5 As much as I would like	4 Almost as much as I would like	3 Some, but would like more	2 Less than I would like	1 Much less than I would like	Prefer not to answer
I have people who care what happens to me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get love and affection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get chances to talk to someone about problems at work or school or with my housework.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get chances to talk to someone I trust about my personal or family problems.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get chances to talk about money matters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get invitations to go out and do things with other people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get useful advice about important things in life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get help when I am sick.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

◀ Previous
Next ▶

Figure 4: Graphical Interface – Check Boxes

HPTN 084-01 Questionnaire

6%

If you have any questions about how to complete these items, please ask a member of the study staff.

▶ How old are you?

▶ How many brothers and sisters do you have?

- None
- 1 to 3
- 4 or more

▶ Do you have any favorite colors? *Mark all that apply.*

- No, I do not have any favorite colors.
- Red
- Yellow
- Blue
- Green
- Orange
- Purple
- Black
- White
- Other

We will now start asking you the actual survey questions. Please press the 'Next' button to begin.

Figure 5: Graphical Interface – Entering Numbers

HPTN 084-01 Questionnaire

6%

If you have any questions about how to complete these items, please ask a member of the study staff.

▶ How old are you?

▶ How many brothers and sisters do you have?

None

1 to 3

4 or more

▶ Do you have any favorite colors? *Mark all that apply.*

No, I do not have any favorite colors.

Red

Yellow

Blue

Green

Orange

Purple

Black

White

Other

We will now start asking you the actual survey questions. Please press the 'Next' button to begin.

Figure 6: Graphical Interface – Entering Text

HPTN 084-01 Questionnaire

6%

If you have any questions about how to complete these items, please ask a member of the study staff.

▶ How old are you?

▶ How many brothers and sisters do you have?
 None
 1 to 3
 4 or more

▶ Do you have any favorite colors? *Mark all that apply.*

- No, I do not have any favorite colors.
- Red
- Yellow
- Blue
- Green
- Orange
- Purple
- Black
- White
- Other

We will now start asking you the actual survey questions. Please press the 'Next' button to begin.

14.3.6 Submitting the Survey

Once the participant has answered the last question and clicked the “Submit” button, there will be a “thank you” message on the screen, which indicates the survey is complete.

It is important that the staff member responsible for administering the CASI survey double check that the participant has completed the survey before closing the browser.

14.3.7 What Happens to the Data?

It is **important** to understand, and to tell the participant, that the data the participant enters into the computer will never be stored on that computer. Each time the “next” button is clicked and the participant moves to the next question, the answer to the previous question will automatically be transmitted to the SCHARP-specific server. Site staff cannot access these data.

14.3.8 How to Resume a Partially Completed Illume Survey

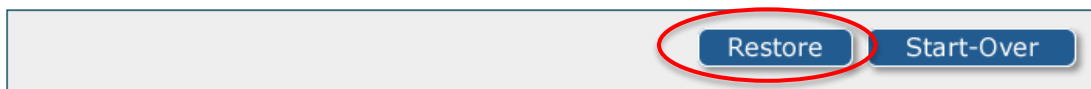
If there is an intentional or accidental closure of the browser, if internet connection is lost, if the computer crashes, or if the participant needs to pause survey completion mid-visit for any reason, site staff will need to log the participant back in to the survey – once available - to allow completion.

Re-open the survey in a web browser and re-enter the participant ID. A page will appear with the following message: “We have located a survey in-progress. Would you like to continue where you last left off or start over?” (**Figure 7**).

Figure 7: Resuming a Partially Completed Survey

We have located a survey in-progress.

Would you like to continue where you last left off or start over?



Select the “restore” button to open the survey to where the participant stopped. Selecting the “start over” button will start the survey over from the very beginning.

14.3.9 Making Up a Missed CASI

If a participant misses taking the CASI at a required visit, or if there is a technical problem that cannot be resolved, the participant can take the CASI at a later time, but no later than the next required visit. If the survey was not done for Week 17 visit, it can be made up no later than Week 18 visit. *The original CASI ID/visit code combination for the missed survey is entered into the CASI.* For example, the Week 17 visit took place on 1 July 2018 but the survey was not done; the participant returned on 8 July and completed the survey. Week 17 would be entered into the survey.

14.3.10 Reminders

Before the participants take the survey, the site should remember to do the following:

- Explain the purpose of the survey and provide general instructions regarding how to use the computer, if necessary, such as how to use a mouse and how to “click” a button.
- Emphasize that the browser navigation buttons should never be used; only the buttons that say “Previous” and “Next” in the actual Illume survey should be used when navigating the survey.
- Remind the participants that their answers are completely confidential. The answers provided by the participants will never be permanently stored on the computer (they are sent to a server that is only accessed by the Statistical and Data Management Center); therefore, none of the site staff will ever see their answers.
- Tell the participants that at the end of the survey they will see a “thank you” message on the screen. This indicates that the participants have completed the survey and they do not have to do anything else.
- Let the participants know that they can ask a site staff member for help, if needed.

14.4 Problems and Questions

If a problem with the CASI occurs, or for all other questions about the CASI including technical questions regarding Illume, contact the [SCHARP Clinical Data Manager](#):

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Please remember that the SCHARP office is located in the Pacific Time Zone (GMT – 7:00). Therefore, “real time” responses to emails and phone calls may not always be possible. A response can be expected, however, within 24 hours.