

Nightly QC Guidelines - Namefile Checks

Overview

The QC team at MAXimum Research plays a critical behind-the-scenes role in ensuring that accurate, clean data reaches our clients. Every night that a survey project is running, QC team members are responsible for reviewing completed interviews, identifying miscoded responses, correcting them before data is sent, and reporting their findings via email.

The QC process is broken into five parts:

1. **Setup/Preparation** -- Done once when a new job starts
2. **Running the QC Process** -- Generating the data listings for review
3. **Checking and Flagging Corrections** -- Reviewing each completed interview
4. **Applying the Corrections** -- Adding flagged case IDs to the cleaning script
5. **Wrapping Up / End of Shift** -- Final pass, cleaning, and QC email

“ **Note:** All QC processing is performed via PuTTY or Termius (terminal/SSH), unless otherwise specified in the project instructions.

What Is "Namefile" QC?

As of 2022, the primary focus of the QC process is verifying the **namefile** question on political poll surveys.

"Namefile" refers to how the responding person is classified:

- **Listed Name** -- The person the sample record belongs to answered the phone and completed the survey.
- **Someone Else** -- A different person in the household answered the phone and took the survey.

Ideally, the more "Listed Name" completions, the better. Most clients permit a percentage of "Someone Else" completions, though rare projects require 100% Listed Name responses.

QC's job is to verify that interviewers coded this correctly for every completed interview.

Part 1: Setup and Preparation

“ As of 2024, this section is handled by the Programmer as part of loading a project into Live Mode. QC team members are not expected to perform these steps. This section is provided for reference only.

Before a job begins, the Programmer will need the **CfMC Info Sheet** for the project, which is emailed prior to the job starting. From it, they need:

- **Jobname** -- Listed at the top of the Info Sheet
- **QC Variables** -- Listed approximately two-thirds of the way down the sheet. There may be a few or many, depending on the client's requirements.

What the Programmer Does

1. Log into the Survox Phone Server Connect via SSH using PuTTY or Termius:

```
sv10.maxresinc.com
```

2. Navigate to the data directory

```
data
```

This places them in `/cfmc/data/`

3. Copy the QC template for the project

```
cp jobname_qc.spx xxx_qc.spx
```

Replace `xxx` with the actual project name (example: `ny1_qc.spx`)

4. Open the new file for editing

```
edit xxx_qc.spx
```

Inside this file, several `>Define` codes appear near the top. The first two are **required**; the rest are optional based on PD instructions:

Define Code	What to Do
@jobname !!!!	Replace !!!! with the jobname (example: ny1)
@askname !!!!!,!!!!	Replace the first !!!! with the SAMPLE name from the Info Sheet, and the second !!!! with the DATA name (example: orig_name,namex)
@vars2	If the PD wants additional variables checked (example: email address), list them here separated by commas. Remove the two apostrophes in front of the >define line to activate it.
@namefile	If this is NOT a namefile job but still requires cleaning, add two apostrophes in front of this >define line to disable it.
@show0E	If the PD requests open-ended responses be listed in the output, activate this define.

Save and close when done (Ctrl+X, Y, Enter).

5. Add the job to the QC queue

```
edit runqc
```

Scroll to the last line and add the job, mirroring the format of the lines above it:

```
m2 xxx_qc.spx
```

Save and close (Ctrl+X, Y, Enter).

Part 2: Running the QC Process

“ QC must be checked **every day**, for **every job** that requires it.

When you check during your shift varies, but each job must be checked **at least once during the shift** and **again after the job ends for the night**.

Use the following schedule as a guide:

Weekday Check Schedule

Job End Time	Initial Check	2nd Check	Final Check
10:00 PM or earlier	7:00 PM	--	At close
11:00 PM	7:00 PM	9:00 PM	11:00 PM
12:00 AM or later	8:00 PM	10:00 PM	12:00 AM

Weekend Check Schedule

Job End Time	Initial Check	2nd Check	Final Check
6:00 PM or earlier	3:00 PM	--	At close
8:00 PM	4:00 PM	6:00 PM	8:00 PM
9:00 PM or later	4:00 PM	7:00 PM	Close time

Steps to Run QC Listings

1. Log in to Survox10 Connect via PuTTY/Termius to `sv10.maxresinc.com`

2. Navigate to the data directory

```
data
```

3. Run the QC batch

```
runqc
```

This will open a file where you must update the date:

- Find the date field: `[date#mmddyy]`
- Change `mmddyy` to today's date (example: `090922` for September 9, 2022)
- **If cleaning data after 12:00 AM EST**, enter both today's and the previous day's date:

```
[date#091222-091322]
```

- Save and close (`Ctrl+X`, `Y`, `Enter`)

The system will then process each job in the queue file automatically. When it finishes scrolling through, you are ready to check the data.

Part 3: Checking for Corrections

“ This is the most important part of the QC process. High attention to detail is required. A missed case means bad data reaches the client.

Recommended: Have scrap paper handy for notes, and have your email open and ready. You will need **one email per job** you are responsible for cleaning.

Prioritizing Jobs

When multiple jobs are running simultaneously, start with the jobs **ending soonest**. Data is sent to clients no later than 1 hour after dialing finishes for the night -- the sooner you clean, the better.

Opening a Job's List File

Each job generates a list file named `jobname.lst` (example: `ny1.lst`).

To open it from your terminal:

```
edit jobname.lst
```

When done reviewing, press `Ctrl+X` to close. If prompted to save changes, press `N` -- you are only reading this file, not editing it.

What to Look For

Each completed interview entry will show the namefile code, the original sample name, and the name collected during the survey. It will look like this:

```
Namefile: AnswerFrom(name)/Listed Name -- or -- Someone Else
Orig_name: Brian Carson
Name/Namex: Jennifer
```

The rule is simple:

- If the two names **match** -- Namefile should be coded as **Listed Name**
- If the two names **do not match** -- Namefile should be coded as **Someone Else**
- If the codes do not line up with the names, this is a **flagged case**

When in doubt, leave it as the interviewer coded it. Some name variations are obvious (Bob vs. Robert, Patty vs. Patricia), but others are not. If you cannot be certain, do not flag it.

Recording Flagged Cases

As you find flagged cases, copy and paste the case block from the list file directly into your QC email. Then note what was wrong and what correction will be made. Example:

```
***** Case ID: 111155 *****  
Statcode: COMPLETE  
Interviewer: 1281 Richard Kuo  
Survey Length: 15.65  
Date Stamp: MON SEP 12 2022 12:37PM  
Recording (if App): cm_220912_123741_caseid111155_6088505681_intv1281  
Assigned Quotas: Region 4, Landline, Name_On, 65 and over, White, Male  
**Changed to Someone Else
```

Continue through the entire file. When you reach the end, **note the last Case ID shown**. On your next scheduled check, use `Ctrl+W` in the editor to search for that ID and pick up right where you left off.

Part 4: Applying the Corrections

Once you have finished checking a job, it is time to add the flagged case IDs to the cleaning script.

Opening the Cleaning Script

1. From your terminal:

```
stu jobname
```

(Example: `stu ny1`)

2. Navigate to the dp directory:

```
cd dp
```

3. Open the cleaning script:

```
edit qc.spx
```

Adding Case IDs

Inside `qc.spx`, scroll down until you find three sections labeled with `>rep $A=` at the start of the line. Each section contains placeholder IDs (`000001,000002,000003`) that you will replace with the actual flagged case IDs.

The three sections are clearly labeled:

Section	Purpose
Part 1	IDs to change FROM Someone Else INTO Listed Name
Part 2	IDs to change INTO Someone Else (from Listed Name)
Part 3	IDs to DELETE entirely (rare -- use with caution)

Replace the placeholder IDs with your flagged IDs, separated by commas.

If Your ID List Gets Long

If the list of IDs is too long to fit on one line, end the line with `,&` and continue on the next line:

```
>rep $a=000001,000003,234567,436547,623468,&  
658324,574834,134677,673472
```

IMPORTANT: Do NOT place a comma after the last ID in the list. A trailing comma will prevent the script from running correctly.

Save and close the file (`Ctrl+X`, `Y`, `Enter`), then move on to the next job on your list.

Once all assigned jobs have been checked and corrected, you are free to work on other tasks until your next scheduled check time.

Part 5: Wrapping Up / End of Shift

When a job has closed for the night, perform **one final pass** through its list file and add any remaining flagged cases to the cleaning script.

“ You have approximately **1 hour** from the time dialing stops to complete cleaning before the data is automatically sent to the client. If you believe you cannot finish in time, contact the Project Director (PD) immediately so they can pause the automatic send until cleaning is complete.

Sending the QC Email

After a job is fully cleaned for the night, send your QC email. **Do not wait for all jobs to be finished** -- send each email as you complete that project.

- **To:** Quality (*email group*)
- **Subject:** `Quality Report -- Jobname`
- **Body:**
 - If there were no issues: write `Clean, No Issues`
 - If there were corrections: paste in all the flagged case blocks you collected during Part 3, along with the correction notes for each

When all emails are sent, you are done for the night.

Quick Reference: Key Commands

Command	What It Does
<code>data</code>	Navigate to <code>/cfmc/data/</code>
<code>runqc</code>	Run the nightly QC batch for all queued jobs
<code>edit filename</code>	Open a file for editing in the terminal
<code>stu jobname</code>	Enter a job's Survox environment
<code>cd dp</code>	Navigate to the dp directory within a job
<code>Ctrl+X</code>	Exit the editor
<code>Ctrl+W</code>	Search within the editor (find a Case ID)
<code>Y + Enter</code>	Confirm save when prompted
<code>N</code>	Discard changes (use when closing .lst files)

