



HCHS/SOL Recruitment Data Management System Users Guide, February 10, 2009

Addendum 1: Clean up of Main HHID Pick List

As a part of the function of the multi unit screening feature on the hand held devices, the initial address pick lists on the hand held devices continually displays the household IDs and addresses that have been denoted by the recruiter as multi dwelling units. We suggest maintaining the address pick list at the suggested number of no more than 100 addresses on the list at one time for best performance. The CC has outlined the following procedures to be followed in order to remove the closed “multi” records from the initial address pick list. Centers may need to perform this maintenance at least twice per year, and possibly on a quarterly basis if a significant number of households are screened as part of a “multi-unit” feature.

INSTRUCTIONS

1. Review household screening linkage data report sent to your site by the CC that outlines the reference ID (original ID) and the IDs associated with the address in order to confirm that the MULTI address is closed, i.e. all units have been screened at the address.

- The CC has provided a report from the DMS of all units that are associated with one HH ID. Recruiters will need to confirm that they visited all units at the address and can close that address.
- If ALL units associated with that MULTI address have not been contacted for screening, i.e. there is no HSRB record saved locally or in the DMS, the address is still open and CANNOT be closed (removed from the EXCEL file).

2. Once the data linkage report from the CC has been reviewed, copy the main HH ID EXCEL spreadsheet (K:\mainhouseholdIDS) from the handheld device to a thumb drive so that you have a permanent backup of the spreadsheet that is copied from the device.

In order to insure that the file can be archived properly without risk of overwrite, save the file with the date when it was copied from the device.

3. Transfer the EXCEL spreadsheet to another computer for ease of modification.

4. Make a copy of the spreadsheet, labeling it with a word such as “updated” in order to denote that the EXCEL spreadsheet is modified.

5. Find and confirm which rows that are marked as “MULTI” (Column D) should be removed from the spreadsheet.

6. For each “MULTI” record to be removed from the existing spreadsheet, cut the entire row of the “MULTI” record and paste it into a new EXCEL spread sheet. When cutting a row, make sure there is not an empty row in the spreadsheet afterwards, or that only part of the row is cut.

Continue to cut the appropriate “MULTI” records from the spreadsheet and paste them into the new EXCEL sheet until all appropriate “MULTI” records have been cut and pasted into the new EXCEL spreadsheet.

7. Save the spreadsheet that has been updated. This updated spreadsheet will be copied to the handheld device.

8. Save the new spreadsheet that has the closed “MULTI” records with the date and a word such as “multi”. This spreadsheet should be archived.

9. For quality control purposes, have another person review the original spreadsheet and the updated spreadsheet to make sure HH IDs were not inadvertently cut from the spreadsheet. Only the confirmed closed HH IDs that were denoted as a multi unit dwelling by the user should be missing.

10. Copy the updated spreadsheet to a thumb drive.

11. Replace the existing main HH ID file with the updated file.

12. Document the date, the number of the device, the archived file name, and the person who completed the procedures on the attached maintenance log sheet. Note the CC may request to review this log at any time.

NOTES

1. Careful attention should be paid when cutting the files from the device. Remember, if a HH ID is accidentally removed from the device, recruiters cannot screen the address. Eventually, quality control data checks at the CC will inform us if an address was not visited. However, we prefer for this situation to not occur.
2. This procedure must be done all at once on a device once it has been started. Do not copy the files from a device and then proceed to have a recruiter go out into the field with that device. This action may cause addresses to be visited on more than one occasion. The procedure can be done on each device at different times, but once the procedure is started on a device, the device CANNOT be used in the field until the procedure is completed.
3. Make sure to keep (and update) a master log for this “maintenance” procedure that includes handheld device number (see underside of UMPC) and date of changes to HH ID pick list.



Instructions: This log documents the maintenance and clean up of the household ID pick list on the hand held devices. Copies of this log may be requested by the CC at any time.