Q-Notes User Guide
Version 1.6
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# Q-Notes User-Guide

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1.0 Introduction

Q-Notes is a data collection and analysis tool designed to facilitate a systematic, comprehensive approach for analyzing survey data gathered through cognitive interviews. This user-guide provides instructions to survey analysts and other professionals involved in cognitive interviewing projects. It assumes that users understand qualitative analysis techniques and know how to interpret the results provided by Q-Notes. Please note that the user-guide would not enable one to become an analyst; however, like any other tool, the more you use it, the more proficient you will become over time.

If you are new to Q-Notes, you can explore information about Q-Notes by clicking on the link “New to Q-Notes” on the bottom of the login screen. This will bring up the “About” Q-Notes page, with more information about the application.
The about screen provides various information to gain a better understanding of Q-Notes features as well as register as a new user.

### 1.1 Registering As a New User

To register as a new user; just click on the “Register Today” link on the bottom of the About page and follow the on-screen directions to complete the registration process [see screens below].

- The following screen is displayed:
  - Fill in all fields as noted below:
• Email Address: The email address for the user

• Password: At least 8 characters, including a letter, punctuation and numeric digit.

• User Name: The intended ID the user will use to log onto Q-Notes

• Institute or Organization: The agency, affiliation organization or educational institution the user is a part of.

• Captcha: Enter text displayed in the picture

After the information is entered, the users must agree to disclaimers about what information will be allowed in Q-Notes and conditions of use.
Click “Register” button to complete the process.

The user will be saved and can then log in to Q-Notes, using their newly created login information.

1.2 User Guide Outline

The document has three parts as follows:

- **Part I – Project Administration.** Starting a new project and setting up project specific information including setup of demographic fields, assigning users, adding survey questions as well as other details.

- **Part II – Data Entry.** Printing out an interview guide for use in a cognitive interview and entering data and notes after the interview has been conducted.

- **Part III - Analysis.** Functions that can be used to view data in a variety of ways, create and manage themes, code interviews, and conduct different stages of qualitative analysis.

1.3 Q-Notes Workflow:

The following diagram highlights the main sections of Q-Notes
Users: Please note that this document is a work in progress. As upgrades are made to the Q-Notes application, this document will continue to evolve to provide useful instruction. Comments and feedback are requested and welcome. This will help the Q-Notes team understand the system and make improvements in future versions.
2.0 Project Administration

2.1 Adding Projects

To add a new project, click on the “Add a New Project” link from the Q-Notes home page.

This will bring you to a “Project Information” screen where you can enter the following:

- **Project Title**: Generic title to describe the project
- **Lead Investigator**: The name of the main project investigator for the project
- **Date**: The starting month and year the interviews will be conducted
- **Main Language**: The default language of the questionnaire and interviews. English is set by default, but any language with roman characters will work.
- **Topic**: A general subject area or domain for the project and questions
- **Information**: General information for the project. It can help provide guidance, instructions or contact information for interviewers on a project. It is displayed on the Project home screen, so it can be used as to provide reminders to users.
When you are finished entering this information, click on “Save” to continuing setting up the project.

2.2 Project Set-up options

The project setup screen will ask the user a set of questions that will enable Q-Notes to understand your project needs and direct you through the remaining set-up options. If the project needs change moving forward, these options can also be updated.
Survey Universe: Is this project testing a population or establishment survey?
   - Population surveys will have the respondent answer questions about themselves, or other people.
   - Establishment surveys will have the respondent answer questions about their business.

Testing Locations: Will testing occur in one country or multiple countries?
   - Across Multiple Countries will make Project countries a required field, and it will organize interviews by the country
   - Within One Country will organize the interview by the Interviewer

Translations: Will interviews be conducted in multiple languages?
   - Selecting “Yes” will make the project setup process include adding question translations

Form Testing: Is this testing a form? And will screenshot of the form be uploaded into Q-Notes.
   - This option is only used for QDRL projects**
Selecting “Yes” will allow for screenshots to be displayed for project where a form is tested

- **Coding Schemes**: Will behavior coding, or a similar coding scheme be used for this project?
  - Selecting “Yes” will make the project setup process include creating coding schemes.

- **Project Collaboration**: Will other users collaborate on, or be allowed to view this project?
  - Selecting “Yes” will make the project setup process include assigning users

- **Respondent Identification**: How should each interview or respondent be identified within the project?
  - **Manually by the Interviewer**
    - The interviewer will create it when adding a new interview.
  - **Country (Automatic)**
    - Q-Notes will create it when saving a new interview, after the interviewer has selected a country.
  - **Interviewer (Automatic)**
    - Q-Notes will create it when saving a new interview, using the interviewer selected as the prefix.
  - **Other (Automatic using custom prefix)**
    - Q-Notes will create it when saving a new interview, using the prefix that will be entered.

After answering the set-up questions click “Save and Continue” to save selections and continue setting up the project.

### 2.3 Interview Fields

Q-Notes contains a few pre-defined fields that can be used to describe a respondent or the interview setting. These fields are displayed for each interview, and can also be used in the analysis functions. Choose fields that fit your project’s needs.

- **Select the radio button next to the field name to add the field for your project.**

- **Select whether the Field will be optional or required**
  - This enables Q-notes to automatically validate the fields when used to save a new interview.
The available fields are:

- **Age** - Numeric value that can represent the age of the respondent, or the age of an establishment.

- **Country** - What country the interview was conducted in. This is mainly used in international multi-site projects.

- **Language** - The language used in the interview

- **Gender** - Gender of the respondent

- **Interview Location** - Whether the interview was conducted in a Laboratory or Off-site

- **Marital Status** – Available options are:
  - Never Married
  - Currently Married
  - Separated
- Divorced
- Widowed
- Cohabitating
- Refused
  - Establishment State - The state an establishment is located

The use of these fields will not only help you collect the data, but also provide additional factors you can use to sort, view and filter data during the analysis stages. After choosing the interview fields for the project; clicking “Save and Continue” to continue setting up the project.

2.7 Respondent Descriptors
Q-Notes allows users to create respondent descriptors. The purpose of these descriptors is to categorize respondents and interviews in an ad-hoc manner. Because respondent descriptors are set at a project level, they can be used for:
- Project level themes
- Additional Respondent Demographics
- Interview setting descriptors
- Any other type of information for a respondent or interview.

Respondent Descriptors

Use this screen to create and edit respondent characteristics, interview descriptors, or project level themes.

1. On the “Respondent Descriptors” page choose “Add New Descriptor”, or select the descriptor name to edit a descriptor.
2. Enter the following information to set up a descriptor:

- **Title**: Short simple title for the descriptor
- **Description**: Brief yet informative description of what it means
- **Format**: Whether one or multiple categories can be assigned or coded
- **Sequence**: Number which defines the order to list the descriptor

Click on “Save” when done adding information.

To add a category here:

1. On the bottom of the screen, click on “Add Category”

2. Enter the following information for the category:

- **Title** – Brief title for an option for the descriptor.
- **Description** – Short yet informative text about when or why this category would be chosen
- **Sequence** – Number defining how the categories should be listed.
3. Click on “Update” and the new category will be added.

4. Add as many categories as needed.

2.4 Project Users

You can assign various users based upon your project needs and what their specific role is going to be for the project you are setting up. There are four types of users:

Q-Notes User Role Types

<table>
<thead>
<tr>
<th>Available Functions / Roles</th>
<th>Observer</th>
<th>Interviewer</th>
<th>Analyst</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>View All Interviews and Data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Add or Edit their own interviews</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Apply themes to their own interviews</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Create Themes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Code themes to others' interviews</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Questions</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Change Project Options</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Add Users to project</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

**Interviewer**

This role is mainly for users who will only be entering data or conducting interviews on a project. This gives them basic functionality, and removes risks of complicating the system. It is good for new or inexperienced Q-Notes users.

**Analyst**

This role is for new or inexperienced Q-Notes users, who may be responsible for a portion of the project. For example, if there are multiple analysts, each is responsible for a single domain within the
entire instrument. Analysts can then create themes which only they will need or use, and have the peace of mind that other analysts will not interfere with their process.

**Manager**
This role is for project leads or main investigators, who are majorly responsible for the project. They set up the questions and structure of the project. They have the ability to add or delete information and data. Due to this feature, it is recommended to limit the amount of project managers, and not give new or inexperienced users this role.

**Observer**
This role is for when team members want to let an outside group, or user, view their project data. They will have the ability to view all entered data and run analysis queries, however they will not be able to make any additions or deletions to the data.

**To add a user to a project:**
- Click on “Project Users” from the Manage Project menu
- The Project Users screen is displayed with valid users’ names
- Assign users to your project by choosing the correct role in the drop-down box
- When done, click the “Update Users” button under the list on the bottom of the screen
After assigning users to your project, click “Done entering users” to continue setting up your project.

New Users who registered on the website will not have the “Other Users in Group” option. However they can search for a user to add to the project.

Once the user has been found with the given search name. The user can be assigned a project role, and an invite will be sent to allow the user to access the project.

### 2.5 Project Countries
Q-Notes allows for countries to be added for international projects. These projects have interviews which may be conducted simultaneously in a number of countries. This screen allows you to choose which countries are involved on the project and should display on the data entry screens.

1. On the “Project Countries” screen, select the countries from the list of available countries.
2. Click “Add” to add those countries to the list of chosen countries.
3. Click “Save Countries” to ensure all chosen countries are added to the project.

4. If a country is not on the list:
   1. Click the “New Country” link at the bottom.
   2. Enter the New Country’s name in the text box.
   3. Then click the “Save Country” button.
4. It will then be added to the list, and can be selected for the project.

After choosing countries available for your project, click “Save Countries” to ensure they have been added. Click “Save and Continue” to continue with project set-up.

2.6 Adding Project Languages
Q-Notes allows for projects to be conducted in multiple languages.

1. On the “Project Languages” screen, select the countries from the list of available languages.

2. Click “Add” to add those countries to the list of chosen languages.

3. Click “Save Languages” to ensure all chosen languages are added to the project.

4. If a country is not on the list:

   5. Click the “New Country” link at the bottom.
6. Enter the New Language’s title in the text box.

7. Then click the “Save Language” button.

2.6 Add/Edit Project Questions
Q-Notes is designed specifically for analysis of questions. Every project must have questions. The Project Questions screen will show all of the project’s current questions. For a new project, it will be blank with an option to add a new question. Click “Add New Question” button to start.

- Enter the following information for the question:
  - **Project Question ID** – A short unique identifier for the question to be used throughout the project to refer to this question. The ID should contain a reference to the question for the interviewers to easily know what question it is. Having a project specific prefix can also help ensure individuality for future projects.
  - **Question Number** – A numeric value to set the order, or sequence, of the questions.
  - **Section** – A title for current set of questions. This provides the ability to quickly view subsets of questions within the project.
o Question Text – The verbatim text of the question

o Response Format – Refers to the type of question being asked
  - Select One – Only one choice may be selected from pre-set response options
  - Mark All that Apply – More one choice may be selected from response option
  - Open Ended – Response is open ended. Allows free text to be entered as a response to question
  - Number Value – Response is a number

• Optional Free Text – Adds an "Other" response option for Select One or Mark All that Apply questions/ when selected, the system display a text box for entry of additional text.

• Virage QuestionID**
  o Only shown in internal QDRL version
  o Used in the import process for intranet systems that have a Virage video database
- Save information by clicking on the “Save” button or “Update” for edits

After a new question has been saved, or an existing question has been selected. There are additional links which are enabled to provide more capabilities.

- **Question List** – Go back to the question list to see all questions

- **Add New Question** – Create an empty form to add a new question

- **Delete Question** – Delete the current question from your project

- **Change QuestionID** – Change the Question ID

- You can also view and add response options for the questions.
2.7 **Adding Response Options for a Question**

To add Response Options for “Select One” or “Mark all that Apply” questions:

1. Select “Add New” from the Response Option area

2. Enter Response Information data:
   - Text
     
     ***Answer categories should not contain apostrophes or quotes. This will cause a problem for some analysis functions.***
   
   - Sequence: Numeric value referring to the order this response should be displayed
   
   - Skip Patterns: Textual directions for how to proceed through the questionnaire/instrument with that response option. For example, a "Yes" response option skip pattern: "Skip to question 3."
   
   - Click "Update" button.
2.8 Changing the Question ID
At times, it may be necessary to change the Question ID after it has already been entered. The safe way to accomplish this, without losing any information would be to:

1. Click the “Change QuestionID” button.

   This will bring up another field below for the new QuestionID.

2. Enter the new Question ID.

3. Then click the “Save New QuestionID” link.

2.9 Adding Translations for a Question
A manager also has the capability to enter a translation for each question for international or multi-language projects. Managers can type in the Country (if not US) or Language and the translated text into the “Text” field.
To add translations for a Question:
1. Select the Translations Tab

**Translations**

<table>
<thead>
<tr>
<th>Add New</th>
<th>Language</th>
<th>Country</th>
<th>Translation Text</th>
<th>Translation File</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No Translations have been added

2. Select "Add New Translation"

**Translations**

<table>
<thead>
<tr>
<th>Add New</th>
<th>Language</th>
<th>Country</th>
<th>Translation Text</th>
<th>Translation File</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Spanish</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Montenegro</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Usted se considera ser...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hombre</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Enter Translation data:
   - Country/Language
   - Picture File
   - Translation Text
If the language uses a non-standard character set, the manager can scan the questions individually, and then type in the picture file name for the specific question into the “Translation File” textbox.

- When finished, click “Update”
- The following screen is displayed

**Translations**

<table>
<thead>
<tr>
<th>Add New</th>
<th>Language</th>
<th>Country</th>
<th>Translation Text</th>
<th>Translation File</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Spanish</td>
<td>Montenegro</td>
<td>Usted se considera ser...</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Hombre</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mujer</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Algo diferente</td>
<td></td>
</tr>
</tbody>
</table>

To edit existing questions for a project, select the “Questions” link on the main page. You can then select the project name from the drop down menu on the “Question Administration” screen. This will then display all of the existing questions for that project. To edit a question click the link labeled “Edit” to the right of the question. Enter or update the information previously stated.

**2.10 Copying a Question**

To copy the general information for a question [including the response options]:

1. Click on the “Copy Question” button
2. Select "Copy Question"

3. Enter Question data:
   - **New Question ID** – ID for new question
   - **Sequence** - numeric value referring to the order this question should be displayed

4. Click on “Copy Question” to copy or “Cancel” to stop
   - the system copies the question with the new ID

5. Click on “Question List” to see the list of questions including the new question
6. click on the question to display the details [see screen below]

**Question Details**

**TIP:** Copying questions is a very useful method of quickly adding a number of questions that may only change one or two words, from one question to the next.

**2.11 Copying Question Response options**

There may be times when questions will have similar response options. Q-Notes will allow users to copy response options from one question to another to make this process easier.

To copy response options to a different question:

1. Click on the “Copy Response Options” button
2. Select “Destination Question ID” from drop down

3. Click “Copy Response Options” button to complete.

2.12 Coding Schemes

Q-Notes provides the functionality to have coding schemes, such as for behavior coding. By default, Q-Notes allows users to add generic respondent and interviewer behaviors to their projects. These can then be assigned on a question by question basis for each of the respondents, and additionally printed on the interview guide. Users can also add to each of the schemes manually, and add new coding schemes as necessary.
Project Codes

<table>
<thead>
<tr>
<th>Coding Scheme</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No data to display

**Coding Options**

- **Add New Coding Set**
- **Add Generic Interviewer Behavior Codes**
- **Add Generic Respondent Behavior Codes**
- **Save and Continue**

Click the buttons below the table to add new codes.
- Clicking “Add new Coding Set” will provide a blank form to add new codes
- Clicking “Add Generic Interviewer Behavior Codes” to add a basic set of codes based on the interviewer
- Clicking “Add Generic Respondent Behavior Codes” to add a basic set of codes based on the respondent
2.13 Manage Project Summary
Clicking the “Manage Project” menu, will display the project summary screen. This will contains all the sections of the project added for set-up. This will provide a simple location to ensure the project is ready.
Note: The side menu contains green check mark icons when the item is correctly setup. It will display red “X” icons when the items need to be fixed. If all items are fixed, the project will be ready for data entry to begin.
3.0 Q-Notes Data Entry
Q-Notes provides a structured, standardized and systematic method to collect data from potentially different interviewees, in different locations and sometimes even in different languages. The features and functions described in the following section will help you understand where data gets entered, along with how to navigate the data entry components of the system.

1. Log into Q-Notes using your ID and password
2. Click on the project you want to work on

The “Project Home” screen will be displayed

3.1 Project Home
On this screen you can see the general project information. There will also be a summary list of interviews that have already been entered. This page will allow you to:

- Add a new interview
- View the list of all interviews for the project
3.2 Print Interview Guide:

To print the interview guide from the “Project Home” screen, click on “Print Interview Guide”; the following pop-up is displayed:

- Choose from the options to customize the what is included on the Interview Guide printout:
  - **Project information**: General information for the project entered during setup.
Interview Information and Demographics: This includes the interview fields chosen during setup which may include respondent demographics.

Respondent Descriptors: Any descriptors or project themes created during setup.

Increase space for taking notes: This will add another inch of space on the given printout allowing interviewer more room to take notes.

Themes options: If any themes have been created for questions, this will include those themes on the printout, allowing the interview to begin coding at the interview. This can also help to ensure or remind the interviewer to get certain information.

Language: If there are multiple languages, a user can choose a different language for the printout.

- The interview guide will be displayed in a pop-up window, along with an automatic printing.

- The automatic print function occurs for all printouts selected in Q-Notes. [Click “cancel” if you only want to view the results].
• Select the printer you want to print on and enter other related parameters and click “Print”

Printing the interview Guide can also occur from the Enter Data tab, available from the menu on all screens. It will print with all the default options.

3.3 Add Interviews
To add new interviews, click “Add New Interview” on the project home screen. It will direct you to the Interview Details screen.

On this screen, you can enter information regarding the interview and the respondent using the following fields:

- **Interview Date**: Date the interview occurred. Select the date from the calendar by clicking the arrow on the dropdown, or by entering the date manually in mm/dd/yyyy format.

- **Interviewer**: This field is automatically set, to the current user entering data.

- **Interview Location**: General location of where the interview took place. The options are either a specific “Laboratory” or “Off-site”.

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The following demographic fields are not always present. The main project investigator decides whether the fields are used.

- **Respondent ID**: A generic ID to identify this interview from other interviews.
- **Age**: Numeric value that can represent the age of the respondent, or the age of an establishment.
- **Country**: What country the interview was conducted in. This is mainly used in international multi-site projects.
- **Language**: What language the interview was conducted in.
- **Gender**: Gender of the respondent.
- **Marital Status**: Select one from the Dropdown box
- **Establishment State**: The state an establishment or business is located.

In the “Interview Summary Notes” box, enter relevant information about the interview. This field is intended to capture any information regarding the respondent that emerged from the interview. This may include comments made by the respondent or observations made by the interviewer. ***The notes fields allow users to type in any text. However, NO PII should ever be entered anywhere in the system.***

- Click “Check Spelling” to run spellcheck on the notes box.

After all data has been entered. Click “Save” (or “Update” when editing an interview).

The Interview Details will be saved as the screenshot below will depicts.
- Text informing the interviewer of the saved RespondentID.
- A summary of the respondent information just entered
- Clicking the down arrows next to the “Interview Details” heading will allow the user to update any information that was incorrectly added.
3.4 Respondent Descriptors or Project Level Themes

Once an interview has been saved, users can code respondent descriptors. Just select the categories, under the chosen theme.
While selecting categories, the text will highlight to identify the saved selection.

A notes box will also display to the right allowing the user to enter text stating why an option was chosen.

The next step in entering data is to enter question summaries for the new respondent.

Clicking “Add/Edit Question Summaries” to view the list of Questions for this project and this respondent.

### 3.5 Interview Question Summaries List

The question summaries list displays all the questions for the interview for the project. It includes any notes entered and the response option entered for each.
You can click the “Select” button to go to the notes entry screen for the question.

Clicking the RespondentID will show you the main respondent information.

- You will also have a button are able to “Print Interview Data”. This will display a printer friendly pop-up with all data for that interview, including question answers, notes and theme data.
To find specific questions easier, you can use the filter box in the table list to find a specific question.

<table>
<thead>
<tr>
<th>Question</th>
<th>Question Notes</th>
<th>Answer</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Health</td>
<td>He rated himself as &quot;good&quot; because he is mobile. As he put it, &quot;A lot of people don't have arms or legs or are stricken to wheel chairs.&quot; He also added that the fact that he eats well and is not obese is part of the reason he selected &quot;good.&quot; He has the &quot;capacity to exercise,&quot; though he doesn't always do it. I asked what it would take for him to describe his health as excellent or very good, and he responded that if he did not have &quot;arthritic issues&quot; he would give himself this rating. He has arthritis in his shoulders and every now and then will get a gout attack, which he described as &quot;very debilitating.&quot;</td>
<td>Good</td>
<td>Select</td>
</tr>
<tr>
<td>Physical Activity</td>
<td>I asked if there were any particular diseases he was thinking about and he answered that he was thinking generally about anything that's unhealthy but went on to give examples: diabetes, cancer, and cardiovascular disease. He is currently swimming and walking more to increase his physical activity. He is doing this much more than he was before. Before he was doing about half as much physical activity as he is now.</td>
<td>Yes</td>
<td>Select</td>
</tr>
</tbody>
</table>

To enter notes for a specific question, click on the “Select” link next to the question and you will be directed to the notes entry screen.

### 3.6 Add Question Notes

The “Notes Entry” screen displays the question and Respondent ID, Interviewer and Interview Date for the chosen interview. It will also display the Question text and question ID for the selected question.
Next, you can select the answer the respondent gave to this question during the cognitive interview by selecting from the answer drop down box.

If the respondent gave an answer other than the ones provided in the questionnaire, you can select “other” and fill in the response given in the blank box that appears.

For a “Mark all that apply” question, hold down the control key while making your selections.
Click “Clear Answer” if you selected an answer by mistake, and would like to leave the field blank.

### 3.7 Entering Notes

Next, you can enter any notes that you took during the cognitive interview in the “Interview Notes” field. This field is intended to capture any information that emerged during the cognitive interview. For example, you may want to enter direct quotes from the interview. When done, click on “Save Notes”. A “Notes saved” message will be displayed.

Click “Clear Data” if you would like to erase all data, including any selected answers and notes, for the question for the respondent.

### 3.8 Question Themes

On the bottom of the Question Notes entry screen, question themes may be present. Question themes are determined and entered into Q-Notes by the primary investigator, or a manager, of the project. Note that not all questions have themes, however if a question has themes associated with it, they will be displayed below the narrative box in the “Analysis” area. In the example below there are two themes for this question: Interpretation and Judgment Process.
Themes typically have multiple categories from which to choose. Select the theme category that applies to the respondent’s narrative. When selected, the category font will change to green and be italicized. This informs you that it has been saved. Also, a data entry box should appear on the right. You may enter any notes regarding that theme category in the space provided. If you enter notes click on “Save Theme Note” to save any information you have entered. You can enter a note for each category selected.

If you wish to cancel a category selection for a mark all that apply theme, you can click the “Delete Theme Selection” link after choosing the category.

3.9 Emerging Themes

Typically projects will not have any themes at first. During the interviewing process, themes will emerge from the respondents. While entering notes for respondents, users may recognize a potential theme emerging. The “Emerging Themes” functionality allows the user to keep track of these potential themes along with sharing these thoughts with others on the team.
Clicking the “Emerging Themes” button will bring up a window showing any previous discussion on this question, along with a text box allowing the user to add their own comments.

Enter your comments to add to discussion:
Even though the respondent was elderly and had some physical limitations, she mentioned being in her right mind while discussing her “excellent” response

Save Comments

3.10 Coding Schemes
In addition to themes, Q-Notes provides the functionality to have other coding schemes, such as behavior coding. If behavior codes or another set of code has been added for the project a question has themes associated with it, they will be displayed below in the “Coding Schemes” area. In the example below default Respondent and Interviewer behavior codes have been added to the project and are shown.
The user entering this interview can then mark any applicable behavior codes for this respondent and question. The selections will then be automatically saved.

### 3.9.4 Navigation

When you are finished entering notes and other information for a question, use the navigation buttons allowing you to go to the next or previous questions.

- Clicking the faces icon will direct the user to the List of All interviews and respondents.
- Clicking the left and right arrows next to the faces icon, will direct the user to the next or previous respondent viewing the same question.
- Clicking the question list icon will direct the user to the List of All Question summaries for the current respondent.
- Clicking the left and right arrows next to the question list icon, will direct the user to the next or previous question for the current respondent.

**Tips:**
Q-Notes User-Guide

- While viewing other interviewer’s notes can use the “Send Email” link next to the interviewer’s user name to ask questions, guidance or clarifications.

- Notes are best entered directly after an interview, while the information is still fresh. When users don’t have immediate access to Q-Notes following an interview, they may type notes in word for first. Then, come back to Q-Notes and copy/paste the notes.

- After entering an interview and all answers and notes for the questions, return to the Question List, and click “Print Interview Data” to verify all data was entered and saved correctly.

3.10 Viewing or Editing Interviews

Select “View all Interviews” from the top menu within Q-Notes. This will take you to the interview list.

The list of interviews will display all respondent IDs that have been entered along with the date of the interview and the interviewer.
- Select the row of the interview to view the question list for that interview.
- Select any column header to sort the list by that field.
- Use the dropdown or textbox below the column header to filter the list based on the value entered.

4.0 Conduct Analysis

After data is entered for a project, you can perform analysis various functions. The method of analysis outlined in this guide is rooted within the principles of qualitative methodology, specifically, within grounded theory methodology.

The general process for analyzing cognitive interviewing data involves synthesis and reduction – beginning with a large amount of data and ending with conclusions that are meaningful and serve the ultimate purpose of the study.
For analysis of cognitive interviews, reduction and synthesis can be conceptualized within five incremental steps – conducting interviews, producing summaries, comparing across respondents, comparing across subgroups of respondents, and reaching conclusions, as shown below.

**Products of Data Reduction for Analytic Steps**

<table>
<thead>
<tr>
<th>Analytic Step</th>
<th>Data Reduction Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Conducting</td>
<td>Cognitive Interview Text</td>
</tr>
<tr>
<td>2. Summarizing</td>
<td>Detailed Summaries</td>
</tr>
<tr>
<td>3. Comparing Across Respondents</td>
<td>Thematic Schema</td>
</tr>
<tr>
<td>4. Comparing Across Groups</td>
<td>Advanced Schema</td>
</tr>
<tr>
<td>5. Concluding</td>
<td>Conclusions</td>
</tr>
</tbody>
</table>

Although these steps are separate and in a linear fashion, in practice they are iterative; varying levels of analysis typically occur throughout the qualitative research process. The QDRL has recently published a book “Cognitive Interviewing Methodology” that goes deeply into the process including analysis which will give the user deeper insight into the process.

This section provides information on how to use Q-Notes to perform functions that support the analysis.

To begin,
1. Log on to the Q-Notes
2. Select a project to analyze
3. On top, click on “Conduct Analysis” tab to get to the analysis main page.

As shown below, the Analysis page displays all analysis functions, within each of the 5 levels of analysis (conducting interviews, producing summaries, comparing across respondents, comparing across subgroups of respondents, and reaching conclusions) available with a brief description of each.
Alternatively, hovering over the “Conduct Analysis” tab will list the main analysis functions to quickly navigate to that specific analysis function.
You will notice that there are five groups of functions corresponding to different levels of analysis along with some additional project functions. Under each group, there are various options for different level of analysis.

4.1 Level 2 Analysis: Within Interview
This second stage of analysis is defined as "Within Interview Analysis" because it is focused on one interview and respondent at a time. The goal of this stage is to fully summarize the interview and the notes from each question. Reviewing these interview summaries will allow the analyst to identify possible patterns of interpretation and record respondent difficulties. This is a cursory analysis and is conducted for each individual interview. Typical steps include:

- Synthesizing interview text into detailed summaries: detailing how and why each respondent interpreted the question as well as how they formulated their answers, including events or experiences considered as well as any difficulties answering the question,
• Identifying inconsistencies between answers and story: Case by case analysis
• Noting response problems: misinterpretation, recall difficulty
• Noting any emerging themes or patterns (to prepare for 2nd step)

The “Within Interview Analysis” tool, allows you to view all data for one respondent at a time. To use this function:

1. Select “Within Interview Analysis” from the Analysis Home screen.

   The “Within Interview Analysis” screen will display.

2. Select a Respondent ID from the dropdown box.

   This will display all demographics, questions, notes and answers for the respondent’s interview. The analyst will now have all data related to the respondent in one location and to perform the analytical steps noted above.
Within Interview Analysis

Tips:

- Some analysts prefer to read notes and analyze on pen and paper. Selecting “Print” will display the information in a pop-up window which can be easily printed.

- Clicking “Select” will redirect you to the “Notes Entry” screen. If notes have not been entered correctly, it can easily be corrected.

- Clicking the detail arrow on the left of the question table will display any themes that have been already created. These themes can then be applied for this respondent.
• Entering text in the under the table column header will filter the list showing any rows containing the entered text.

```
<table>
<thead>
<tr>
<th>Question</th>
<th>Question Notes</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>q4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

NCHS09Q4 - During the past 30 days, for about how many days did poor physical or mental health keep you from doing your usual activities, such as self-care, work, or recreation?

When asked this question, she said "Are you crazy! I said none! Why do you keep asking me the same question?" I asked her if she really didn’t see a difference between these questions and she said "no ma'am." Then she said that "all of these questions are asking me if I’m sick in my body or sick in my head, and I said no, I'm not." I then asked her about her foot to see what things she may not have done when she had a sprained foot. She said that for 4 days she had to get her brother to pick her kids up from school and to go grocery shopping for her. Her foot was so swollen up that she couldn’t walk at all.

Themes
- Activity considered
  - Missing-not codeable
  - No activity considered
  - Recreation
  - Self care
  - Something else
  - Work
- Interpretation
  - Type of health problem
    - Mental
    - Missing-not codeable
    - Physical
    - Something else
- Judgement Process
  - Counted
  - Estimated
  - Guessed
  - Missing-not codeable
  - Something else

4.2 Level 3 Analysis: Across Interviews

This third stage of analysis is defined as "Across Interviews Analysis". It uses the question and the unit of analysis and views data across all interviews and respondents at one time. The goal of the second stage of analysis is to determine what the question is actually capturing. Comparing summaries across
respondents will produce a thematic schema. A thematic schema identifies and maps common themes that detail phenomena captured and the process of formulating a response. Typical steps include:

1. Identify patterns across respondents
   - Types of interpretations
   - Ways of forming an answer
   - Types of response problems or errors
2. Compare that finding to the next interview
   - Is it the same? If not, how is it different?
3. Patterns become “themes”
   - Different aspects of a theme are called “categories”

The Level 3 Analysis functions allow analysts to:
- View all respondent data for one question at a time (Across Interview Analysis)
- Define themes and create a thematic schema for each question (Manage Themes)
- Apply themes to the respondents (Code Question Narrative or Respondents by Theme)

4.3 Across Interview Analysis
The “Across Interviews Analysis” function, allows you to view all data for one question at a time. To use this function:
- Click on “Across Interview” under the “Conduct Analysis” dropdown menu
- Select the question you want to analyze from the dropdown menu.
• Question summaries and answers will be displayed for all respondents in the project.

<table>
<thead>
<tr>
<th>ID</th>
<th>Question Summary</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Respondent10 This respondent had a really hard time explaining why they felt</td>
<td>Good</td>
</tr>
<tr>
<td></td>
<td>their health was good. R did mention that he was focusing on physical health.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Respondent8 The respondent wanted to know if the question was asking about</td>
<td>Fair</td>
</tr>
<tr>
<td></td>
<td>how he feels currently or if it was asking if he had any health problems or</td>
<td></td>
</tr>
<tr>
<td></td>
<td>diseases. He explained that he has diabetes and has to carefully monitor his</td>
<td></td>
</tr>
<tr>
<td></td>
<td>blood sugar. He considers his health right now to be &quot;very good&quot; but didn't</td>
<td></td>
</tr>
<tr>
<td></td>
<td>answer that way because he has a chronic disease.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Respondent7 The respondent took quite awhile to answer this question. She</td>
<td>Good</td>
</tr>
<tr>
<td></td>
<td>finally answered, &quot;I guess good&quot; because it &quot;fell somewhere in the middle.&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>She said her health goes up and down, some days she doesn't feel good and</td>
<td></td>
</tr>
<tr>
<td></td>
<td>other days she feels fine, so it was difficult for her to arrive at a general</td>
<td></td>
</tr>
<tr>
<td></td>
<td>answer. When asked if she included mental health in her answer, she said no,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>that didn't even cross her mind.</td>
<td></td>
</tr>
</tbody>
</table>

• Clicking the Row expand button will allow an analyst to select categories for themes for each respondent.
After a question is selected the following options will be present:

**Across Interview Analysis**

- Print Question Summary – Displays all information in a printer-friendly window
- Emerging Themes – Allows a user to view or add to discussion about potential themes from the interview team
- Manages Theme – Provides capabilities to create, update and delete themes and categories.

### 4.4 Manage Themes

During the analysis stages, certain patterns may emerge. These patterns are called themes. **Q-Notes** allow you enter themes for specific questions and also for the project or sample as a whole. To create themes:

#### 4.4.1 To view or enter themes:

1. A drop-down menu will then appear containing all question IDs for the project. Select the question ID for which you wish to add or edit a theme.
If themes have already been created, they will appear on the screen.

2. Click on “Add New Theme” link under the existing themes to create a new theme, or click on the title of the theme you would like to edit.
As stated earlier, patterns that emerge are called themes. Different aspects of themes are called categories.

3. Enter the following information to set up the theme or category:

- **Title**: Short simple title for the theme
- **Description**: Brief yet informative description of what the theme means
- **Format**: Whether one or multiple categories can be assigned or coded for the theme.
- **Sequence**: Number which defines the order to list themes
- **Level**: Defines how the theme will be organized in a hierarchy
  - Main theme: This highest and first level for a theme
  - Sub theme: When a category may be further divided in analysis. The category should be changed to a sub theme. A sub theme can have its own categories.
For Sub themes and Categories, you must select the title of the main theme which those fall under.

Click on “Save” when done adding information.

For a main theme or sub theme, you can also add categories directly on this screen.

To add a category here:

5. On the bottom of the screen, click on “Add Category”

6. Enter the following information for the category:

- **Title** – Brief title for the aspect of the theme.
  
  **Titles should not contain apostrophes or quotes. This will cause a problem for ad-hoc, on-the-fly analysis.**

- **Description** – Short yet informative text about when or why this category would be chosen

- **Sequence** – Number defining how the categories should be listed.

- **Is the category also a subtheme?** – During analysis it may develop that a category can be further broken down and differentiated. Checking this box, will allow the analyst to allow this category to also be seen as a theme so that sub-categories can be added within it.
7. Click on “Update” and the new category will be added

8. Add as many categories as necessary;

You can do this for project or question level themes as necessitated by the analysis.

4.6 Deleting a theme
To delete a theme, select the “delete” button at the bottom of the screen. However, if a theme has any categories or subthemes below it, those must be deleted first.

Categories for a theme can be deleted by clicking the red “x” button next to the category. However, categories can only be deleted if they have not been applied to any respondent selections.

4.7 Copying themes
Once created, a theme can be copied to other questions. To copy a theme:
1. Select the theme you want to copy from the list
2. Select Copy Theme from the bottom of the screen

3. Select one or more questions to copy the themes to.

4. Then, click “Copy Theme to Questions”.

5. Click “Done” after selections have been made for the themes to be copied to the other questions.

Only top-level main themes for questions can be copied, and all subthemes and categories will be copied as well.

Tips:
For Questions Themes: Once a question has been selected the text and a link to “view emerging themes” is displayed. Clicking “View Emerging Themes” will bring up comments and ideas from analysts indicating potential themes they are seeing. This can help define and name new themes being created.

4.8 Emerging Themes

- To view or create a new emerging theme, click on the “Manage Question Themes” screen
Manage Question Themes

Add analytical themes for your questions or project

Select Question: NCHS09Q1

Would you say that in general your health is excellent, very good, good, fair or poor?

- Click on the “Emerging Themes” button to see any ideas or discussions related to the question

<table>
<thead>
<tr>
<th>Memo</th>
<th>QuestionID</th>
<th>CreatedDate</th>
</tr>
</thead>
<tbody>
<tr>
<td>some discussion</td>
<td>NCHS09Q1</td>
<td>May 19 2014 12:15PM</td>
</tr>
<tr>
<td>time about 5 years ago that she had the flu and was sick in bed for 3 days. She said that she also never gets colds or has any allergies.</td>
<td>NCHS09Q1</td>
<td>Oct 29 2014 3:01PM</td>
</tr>
</tbody>
</table>

Enter your comments to add to discussion:

Save Comments

- Enter any additional thoughts or information about potential themes for this question and click “Save Comments”
• Viewing emerging themes on this screen will give provide potential ideas that can help create and describe themes and categories.

4.9 Code Question Narratives
After themes have been created, this function allows the analyst to easily apply themes and categories for each respondent and for each question.

To access this feature:

1. On the “Code Question Narratives” screen, choose a question from the dropdown.
2. Click on “Edit” next to the respondent you want

Code Question Narratives

<table>
<thead>
<tr>
<th>Respondent ID</th>
<th>Question Summary</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondent1</td>
<td>She said that she answered very good because she doesn’t have any health problems that she knows about. When asked why she didn’t say excellent, she said that “no one is perfect.” She also said that she can’t remember the last time that she was sick. She recollected one time about 5 years ago that she had the flu and was sick in bed for 3 days. She said that she also never gets colds or has any allergies.</td>
<td>Very Good Edit</td>
</tr>
<tr>
<td>Respondent10</td>
<td>This respondent had a really hard time explaining why they felt their health was good. R did mention that he was focusing on physical health.</td>
<td>Good    Edit</td>
</tr>
<tr>
<td>Respondent11</td>
<td>R said that she rarely gets sick so she feels that her health is very good. During probing I asked about her mental health, and R said she had not taken that into account because she felt that this question was more about her physical health. R does have depression but she didn’t account for that in her answer.</td>
<td>Very Good Edit</td>
</tr>
<tr>
<td>Respondent12</td>
<td>R says &quot;excellent&quot; because he works out about 2 to 3 times per week, he doesn’t smoke, he watches his diet, and he is not on any prescription medications. He is currently separated from his wife and they are contemplating divorce. He said he has been experiencing some depression and anxiety as a result of this, but he didn’t take this into consideration when answering this questions. He appeared to consider physical aspects of health when answering this question.</td>
<td>Excellent Edit</td>
</tr>
</tbody>
</table>
This will show all the respondent information for the selected question. Categories for the themes will display to apply for the respondent by:

3. Click the category title under the specific theme.

The selection will be automatically saved, and the text will change to green and be italicized. Additionally another text box will display to the right (which will allow you to enter notes, clear theme notes, save theme notes or delete theme selection).

4. Enter notes for the theme and category. Direct quotes that provide the basis for the selection is usually entered here.

5. Then click “Save Theme Notes” to save the added text.

**Tips:**

- Click “Clear Theme Notes” if you would like to delete any text entered.
- Click “Delete Theme Selection” if you would like to unselect the particular theme.
4.10 Code Respondents by Themes

After themes have been created, this function also allows the analyst to apply themes to multiple respondents at a time. This is especially useful, when users conduct analysis offline on pen and paper, and want to quickly assign themes to respondents.

1. On the “Code Respondent by Theme” screen, select whether to code Project or Question themes.

2. If Question is selected, choose the question containing the theme that needs to be applied.

3. Click the Category for the theme you would like to assign.

4. Next, select the checkbox for each respondent where the category applies.

5. Next, click the button to “Apply Theme to selected respondents”.

6. Do this for each category, and question as needed.

**Tips:**
Themes and categories cannot be deleted from the system if respondents are already assigned. Analysts can come to this screen and clear all respondents quickly, then resume deleting the theme.

Level 3 Conclusions

- Revelations from the comparisons are the cognitive interview findings.
- Findings from the cognitive interviews illustrate the different types of phenomena that the survey questions capture.
- It represents the actual phenomena that are conveyed in the statistical estimate.

4.11 Theme Analysis

This function allows you to view data centered on themes or respondent descriptors of your choice.

Theme Analysis

View data centered around themes or respondent descriptors of your choice.

Select Theme Location
- Project
- Question

Select a Theme

Display:
- Show Question Answers
- Show Question Summaries
- Show Frequency Table

Filters:

Interview Information and Demographics

Output Results

1. Select either a “Project” or a “Question” theme.
2. For “Question” themes, another dropdown will display allowing a question to be selected.
3. Then select a theme from the DD box.
4. If you want to display any of the demographics, click on the “down arrow” as shown below:
5. Click on “Output Results” to display results.

<table>
<thead>
<tr>
<th>Item</th>
<th>Respondent</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Respondent6</td>
<td>Missing</td>
</tr>
<tr>
<td>2</td>
<td>Respondent7</td>
<td>Missing</td>
</tr>
<tr>
<td>3</td>
<td>respondent14</td>
<td>Missing</td>
</tr>
<tr>
<td>4</td>
<td>Respondent9</td>
<td>Right</td>
</tr>
<tr>
<td>5</td>
<td>Respondent57</td>
<td>Missing</td>
</tr>
<tr>
<td>6</td>
<td>Respondent24</td>
<td>Missing</td>
</tr>
<tr>
<td>7</td>
<td>Respondent1</td>
<td>Left</td>
</tr>
<tr>
<td>8</td>
<td>Respondent2</td>
<td>Left</td>
</tr>
<tr>
<td>9</td>
<td>Respondent36</td>
<td>Right</td>
</tr>
<tr>
<td>10</td>
<td>kj_res99</td>
<td>Right</td>
</tr>
</tbody>
</table>
6. You can export this data to PDF, XLS or RTF

4.12 Level 4 Analysis: Comparing Across Groups
The fourth stage of analysis is defined as “Comparing Across Sub-Groups”. The goal is to compare identified themes across subgroups to produce an advanced schema: identifying ways in which different types of respondents may process questions differently depending on their differing experiences and socio-cultural backgrounds.

These groups can be defined by:

- Question answers
- Patterns of interpretation or themes
- Respondent sub-groups

The level 4 analysis functions provide quick ways of viewing, sorting, filtering and grouping all project data, to find potential relationships.

The Sub Group analysis function allows you to see, sort, filter and group the project data in numerous ways organized by one question.

- On the “Conduct Analysis” dropdown tab, click on “Across Subgroup”
- The following screens are displayed:
Choose a question from the dropdown box. Then you can decide any extra information you would like based on the following check boxes and dropdowns:

- **Display Items**
  - “Show question summaries” will include the respondent’s summary notes for that question in the results
  - “Show Question Answers” will include the response option selected for the respondent
“Show Frequency Table” will group the results based on the response option and other data displayed and gives the tally for each combination. (This option will prevent the Question Summaries from being displayed)

- Response Options area: Filters the output to only the selected response option

- Question Themes area: Display themes for the question and/or filter the results based on selections. For each theme displayed you will see the following:
  - Title of the theme – (Link): Clicking this link will display the frequency table in a pop up for that specific theme.
  - “Category” dropdown: Selecting an option will filter the results to just that category for this theme.
  - “Notes” checkbox: Checking this box will display the notes for this theme in the output results.
  - “All Categories” checkbox: Checking this box will display the selections for all categories in the output results. This is mainly used for Themes that are mark all that apply.
  - “Interview Information and Demographics”: Displays demographic criteria with the results.
  - Clicking the box under output will display the data
• After selections have been made, click “Output Results” to display the data.

<table>
<thead>
<tr>
<th>Respondent ID</th>
<th>Answer</th>
<th>Gender</th>
<th>Is R a smoker</th>
<th>Calculation</th>
<th>Middle answer</th>
<th>Not a 5-point</th>
<th>Missing-notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondent12</td>
<td>Excellent</td>
<td>Male</td>
<td>No</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent14</td>
<td>Excellent</td>
<td>Female</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent2</td>
<td>Excellent</td>
<td>Male</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent3</td>
<td>Excellent</td>
<td>Male</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>kjres99</td>
<td>Excellent</td>
<td>Male</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent4</td>
<td>Fair</td>
<td>Male</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent9</td>
<td>Fair</td>
<td>Female</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent8</td>
<td>Fair</td>
<td>Male</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent10</td>
<td>Good</td>
<td>Female</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent7</td>
<td>Good</td>
<td>Male</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent36</td>
<td>Poor</td>
<td>Female</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent11</td>
<td>Very Good</td>
<td>Female</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent1</td>
<td>Very Good</td>
<td>Female</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent5</td>
<td>Very Good</td>
<td>Female</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Respondent6</td>
<td>Very Good</td>
<td>Female</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Respondent57</td>
<td>Very Good</td>
<td>Male</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Results can be exported to PDF, XLS or RTF by clicking the respective buttons at the bottom of the screen.

4.13 Comparative Analysis
The comparative analysis functions provide a quick way of viewing and identifying relationships from a slightly broader perspective, than the sub group analysis. The comparative analysis tools allows you to create crosstabs of two different types of data entered. Q-Notes has four different data types: Questions (Answers given), Project Themes, Question Themes and Demographics. This tool allows you to quickly look at relationships between any of the data.

1. On the “Comparative Analysis” screen, start by selecting the two data types you want to analyze.
2. Then, you must choose which option you are looking for

3. For Question Themes, you must choose the Question first, and then the Theme within that question.

4. Click “Search” to display your results.
The results will be displayed in a table. The rows will be identified according to the label to the left of the table. The columns will be identified with the label above the columns. The numbers within the cell represent how many cases fit both the column and rows categories from the data.

Clicking the numbers in a cell, will display the respondents and related notes for the cases in a secondary table. In the example below, the “2” in the “Counted” column and “Excellent” row was selected.

Clicking the “Information” icon will display interview level information about the respondent.
Click on “Print” – A printer friendly pop up of the screen will display that can be printed.

Click on “Reset” to begin a new analysis

4.14 Compare Two Questions
The Compare Two Questions analysis function is similar to the subgroup analysis, except it allows for data from two questions to be analyzed at the same time. Data can be gathered based on each question’s answers, notes, and themes, in addition to the respondent demographics and descriptors.
1. On the “Compare Two Questions” screen, start by selecting two questions to analyze.

2. Choose additional options by expanding the areas under Question Themes, Interview Information or Respondent Descriptors.

3. Click “Output Results” to search and display results.
This table can be grouped and sorted in any manner using the header column and grouping header.

Drag a column header to the grouping header to group by the chosen column.
- Alternatively right-clicking the column header will provide a menu of the different options for viewing the data.
Results can also have multiple levels of groupings, as seen below:

<table>
<thead>
<tr>
<th>Respondent ID</th>
<th>Q1 Answer</th>
<th>Q1 Narrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respondent57</td>
<td>Very Good</td>
<td></td>
</tr>
<tr>
<td>kj_res09</td>
<td>Excellent</td>
<td></td>
</tr>
<tr>
<td>kjresx9</td>
<td>Excellent</td>
<td></td>
</tr>
<tr>
<td>Respondent8</td>
<td>Fair</td>
<td></td>
</tr>
<tr>
<td>Respondent5</td>
<td>Very Good</td>
<td></td>
</tr>
</tbody>
</table>

- He explained that there are some activities he has to be careful about because of his type 1 diabetes, but he doesn’t do these things anyway so they wouldn’t count as his “usual activities.” He admitted that he did have a somewhat difficult time answering this question. He doesn’t really have mental health problems so he didn’t even consider this when answering the question.

- Respondent asked why the survey always asked about the last 30 days and joked that she can

| Q1 Answer: Excellent (Count=7) |
| Q1 Answer: Fair (Count=3) |
| Judgement Process: (Count=1) |
| Judgement Process: Estimated (Count=1) |
| Judgement Process: Guessed (Count=1) |

| Q1 Answer: Good (Count=2) |
| Q1 Answer: Poor (Count=1) |
| Q1 Answer: Very Good (Count=5) |
4.14  Coding Scheme Analysis
The coding scheme analysis will retrieve all data for selected behavior codes on the project.

1. Click on the DD “Select a Coding Scheme”

It will display a list of all codes for the specified scheme for all questions. For example, the following screenshot depicts a result for selecting all respondent behavior codes.

2. Codes can then be filter by using the other dropdowns.
   - Filter by code: Will show results for all question for a specific code.
   - Select question: Will limit results to just the specific question
     - Choosing an option in both will filter to a specific code and specific question.

3. In that case, the following screen is displayed:
4.15 Sample Analysis

This search allows you to get a filtered, yet detailed look at respondents at the project level. This includes any respondent descriptors or project level themes and all respondent demographic information.
Sample Analysis

This search allows you to get a filtered, yet detailed look at respondents at the project level.

**Project Themes and Respondent Descriptors**

<table>
<thead>
<tr>
<th>Field</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominant Hand</td>
<td></td>
</tr>
<tr>
<td>Has Glasses</td>
<td></td>
</tr>
<tr>
<td>Geographic Region</td>
<td></td>
</tr>
<tr>
<td>Is R a smoker?</td>
<td></td>
</tr>
<tr>
<td>testint</td>
<td></td>
</tr>
</tbody>
</table>

**Interview Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Interview Location</td>
<td></td>
</tr>
<tr>
<td>Marital Status</td>
<td></td>
</tr>
<tr>
<td>Establishment State</td>
<td></td>
</tr>
<tr>
<td>Interviewer</td>
<td></td>
</tr>
</tbody>
</table>

- Show Interview Summary Notes
- Show Quantitative Summary

Based upon various parameters various reports are generated and displayed; a sample output is provided below:
### 4.16 Word Search

This function provides capability to search all notes and summary fields for certain text.

**Word Search**

Enter a word or phrase to search summaries for the criteria.

1. Enter a word or a phrase you want to search [e.g., health]

2. Select appropriate checkbox to specify whether to search either “Question Summaries”, “Respondent Summary” and/or “Theme Notes”
3. Click on “Search”

4. if any matches are found, the results will be displayed

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Summary Type</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Question</td>
<td>She said that she answered very good because she doesn't have any health problems that she knows about. When asked why she didn't say excellent, she said that &quot;no one is perfect.&quot; She also said that she can't remember the last time that she was sick. She recalled one time about 5 years ago that she had the flu and was sick in bed for 3 days. She said that she also never gets colds or has any allergies.</td>
<td>Respondent1</td>
</tr>
<tr>
<td>2</td>
<td>Question</td>
<td>He had a difficult time answering this question. Before giving an answer he asked, &quot;what do you mean by your health not being good? Do you mean that you just don't feel too good, but you can still get around or that you are sick in bed?&quot; I told him to answer whatever he felt was the best. He said &quot;well, I was never so bad that I stayed in bed all day. there were a couple days that I was feeling run down and took it easy, but I wasn't, you know, on my death bed!&quot; He then answered zero days. He did say that he called the doctor to see if he should go for an appt, but the doctor said to wait and see how he felt in the next day or two-and it appeared to pass.</td>
<td>Respondent2</td>
</tr>
</tbody>
</table>

### 4.17 Sample Summary

The “sample Summary” provides an overview of respondent characteristics and demographics, which includes all respondent descriptors. This can be seen below:
4.18 Generate Frequency Tables

The “Generate Frequency Tables” provides the same information as the “Sample Summary” but will also include all question response options and question themes data in the project.

These tables can then be printed or copied and pasted into reports from the study.
4.19 Print Functions
Throughout the lifetime of a project, there is potential for large amounts of data to be entered. This area of the analysis functions allows the analysts to look at those types of data and print out information accordingly. In this section, the following options are available:

- **Interview Guide**: Printout of questionnaire protocol. Users can take this directly into an interview to write their notes and mark answers.

- **Interview Guide (Include themes)**: Printout includes theme structure for questions keeping interviewers aware of themes during the interview, in addition to interview guide.

- **Frequencies Summary**: Printout of all questions and potential response options with tallies for each option, along with themes.

- **Full Question Summary**: Printout of all respondent information, followed by each question with all answers, notes and themes.

- **Emerging Themes**: Printout of any emerging themes entered by interviewers for all questions.

- **Project Level Summary**: Printout of all respondent information, including interview level respondent notes and project level theme data.

For the following functions, you must select an item from the corresponding dropdown then click the title link to display the printout.

- **Interview Summary**: Printout of a particular respondent’s information including question answers, notes and theme data.

- **Interview Group Summary**: Printout of a subset of interviews, based on the interviewer for domestic projects, and the country for international projects.

- **Question Summary**: Printout of all respondent notes for a single question, including emerging theme notes and theme data.

- **Multiple Question Summary**: Printout of a subset of all respondent notes for selected questions, including emerging theme notes and theme data.

- **Theme Summary**: Printout of theme structure for the selected question and theme. Along with tallies for how themes were coded.

5.0 Other Functions

5.1 Changing Passwords

Once you have logged into Q-Notes you can change your password by clicking on the link from the menu labeled “Change Password.” Enter your old password and the new password you wish to use and
then click “Change Password.” Your password must be at least 8 characters long, contain at least one uppercase and one lowercase letter, and a special symbol.

**Change Password**

Use the form below to change your password. New passwords are required to be a minimum of 7 characters in length.

- **Old Password:**
- **Password:**
- **Password:**

[Change Password]

---

**5.2  Reset Password**

Please email **QNotes@cdc.gov** with your username if you have forgotten your password, and need to have it reset.

**5.3  Creating New Users**

As a group manager, you can create new Q-Notes users. Within the project, select “Project Users” from the main menu. Towards the bottom of the Project Users screen, click on the button titled “Create a new user”.

To create a new user:

1. Click on the link at the bottom of the screen labeled “Add New User.”

2. This will bring you to a “User Information” screen. This screen requires the following information:
   
   a. **User Name:** The ID the user will use to log onto Q-Notes
   
   b. **Email:** The email address for the user
   
   c. **Project Role:** Determines the access and privileges the user has to the Q-Notes system. Select the type of group role you wish this user to have.
i. Observer: Can only view data.

ii. User: Only permitted to view and enter/edit notes for the projects.

iii. Analyst: Allowed to enter notes and create new themes.

iv. Manager: Access to all components of Q-Notes, including creating users and projects for the group.

6.0 Appendix A

<table>
<thead>
<tr>
<th>Analytic Step</th>
<th>Theory Building Tier</th>
<th>Data Reduction Product</th>
<th>Q-Notes Element</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conducting</strong></td>
<td>Individual Respondent’s Explanation of Answers</td>
<td>Cognitive Interview Text</td>
<td>Print Interview Guide</td>
</tr>
<tr>
<td><strong>Summarizing</strong></td>
<td>Record of Respondent Difficulties Identification of Potential Themes</td>
<td>Detailed Summaries</td>
<td>Within Interview Analysis</td>
</tr>
<tr>
<td><strong>Comparing Across Respondents</strong></td>
<td>Identification of “What Question Captures”</td>
<td>Thematic Schema</td>
<td>Across Interview Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Manage Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Code Respondents by Theme</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Theme Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Advanced Schema</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Code Question</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Analytic Step</th>
<th>Theory Building Tier</th>
<th>Data Reduction Product</th>
<th>Q-Notes Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groups</td>
<td>Differences Across Groups</td>
<td></td>
<td>Narratives</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sub-Group Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Comparative Analysis</td>
</tr>
<tr>
<td>Concluding</td>
<td>Explanation of Question Performance</td>
<td>Conclusions</td>
<td>Report Printout</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Word Search</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sample Characteristics</td>
</tr>
</tbody>
</table>

### 6.1 Troubleshooting

**JavaScript**
The Q-Notes application uses JavaScript. If JavaScript is disabled some functionality will not be functional. Please ensure JavaScript is enabled.

**Compatibility View – Internet Explorer**
Internet Explorer will sometimes force a website to be viewed in “Compatibility Mode”. This is known to cause some functionality to stop working and result in abnormal layouts. Disabling Compatibility view will ensure the highest Q-Notes performance.

Modify your browser settings to disable “Compatibility View” as follows:

1. Click on “Tools” on the tools bar of the browser
2. The following screen is displayed
3. Click on “Compatibility View Settings”

4. The following screen is displayed
5. Ensure checkbox next to “Display all websites in Compatibility View” is not checked

6. Ensure checkbox next to “Display intranet sites in Compatibility View” is not checked. [If you are a NCHS or CDC employee, accessing the application from within the CDC network]

7. Click on “Close” to complete the process

To ensure that Compatibility View is disabled:

1. Click on “Tools” to display the following menu
2. Click on “F12 Developers tools”

3. The following screen is displayed
1. Click on “Browser Mode” DD

2. The following screen is displayed

1. Ensure that the “Internet Explorer 10” option is checked. [If you have an older or newer version of Internet Explorer, select the most updated version as long as it is not the “Compatibility View” version.]
Network Issues:

Because the Q-Notes application is web-based application, there may be downtime associated with network outages on our servers. Due to internal and external networks, speed may also fluctuate. We ask for your patience and feedback as we work to provide minimal system downtime.

Other issues:
If you experience any problems or issues with Q-Notes, please do not hesitate to send us an e-mail. As we allow more people to use Q-Notes, we realize errors related to higher usage, and usage in other ways, are more likely to occur. In your email, be sure to include the following:

- What task or function you were using or attempting to use?
- What goal you wanted to achieve or perform?
- What error message, if any, you received?

These questions will help us better understand, troubleshoot and resolve your issue. Our E-mail address is QNotes@cdc.gov, include “Error” in the subject line to help route your email to the correct location.

Feedback:
The Q-Notes team is proud to allow free use of Q-Notes to any and all interested parties. We would like also work on improving Q-Notes to become a more useful and universal tool. We welcome and encourage all feedback. If you have any ideas, feedback or comments related to Q-Notes, please send us an email to QNotes@cdc.gov. We look forward to hearing from you.