December 3, 2	009
TO:	SOII-Adobe Team
FROM:	Kathy Downey Office of Survey Methods Research
RE:	OSMR Review of the Revised SOII Adobe Form

Three other members of OSMR and I reviewed the SOII Adobe Fillable Form version dated **11-25-09**. (The Adobe form was revised on 12-3-09.)

Overall, OSMR is very pleased that SOII is offering the Adobe fillable form to respondents. One important issue for the future is whether the Adobe form captures any metadata. In other words, is there an audit trail when a respondent had to correct the form or had keystroke errors? This is highly useful in determining which design elements may not be working and causing data quality or data entry issues. For example, by wiping the decimals during data entry (and not on submission), does this lead to increased corrections that have to be made by respondents?

Another issue is using the wording "significantly more than 15 cases" in the email and throughout the instructions. First, this wording is vague and confusing. We should be clear whether this means 16, 17, or 18 cases. Also, one reviewer suggested that the wording might raise a red flag that the establishment is in trouble. We could add "for assistance on completing this form" before "please contact..."

Additionally, one person tried to complete the form just using the tab key to move between fields. She noticed that the *Tab* key worked differently in different sections.

Our recommendations are detailed on the following pages.

Email to receive form

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From: To: Cc:	SOII@idcf.bls.gov Downey, Kathy - BLS							Sent: Fri 11/27/2009 3:18 PM
Subject: Attachments:	Re: request adobe	KB)						What does "significantly" mean? It's a little vague and confusing. Is it 16,
Thank yo attached	u for contacting the to this e-mail.	e Survey of Occupatio	onal Injuries and	Illnesses	to request an e	lectroi	nic survey form. A	17, 18?
PLEASI If you ha	E NOTE: We have ve significantly mo	designed this survey re than 15 cases, plea	to ensure that you se call us at 334-2	1 do not 242-3462	have to report for assistance	more t	han approximately	y 15 cases with days away from work.
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3. W	/hen all of your dat	a is entered, please sa	ve the form on y	our comp	outer and print	a copy	for your records	in case we need to contact you.
4. W fo	/hen you have comp orm.	pleted the survey, sen	d the form to the	Bureau	of Labor Statis	tic]	Do we know when it's not	how this will appear HTML? Will the bullets
<u>If you ha</u>	ve any questions, y	ou can contact us at c	sh.helpdesk@bls	.gov.		1	become aster	isks or lose the
U.S. Bur	eau of Labor Statist	tics Statement to Res	pondent on the U	se of Ele	ectronic Data T	ran	formatting?	
As a participant in a U.S. Bureau of Labor Statistics (BLS) statistical survey, you should be aware that use of electronic transmittal methods in reporting data involves certain inherent risks to the confidentiality of those data. Further, you should be aware that responsible electronic transmittal practices employed by the BLS cannot completely eliminate those risks.								
The BLS confiden	is committed to the tiality of those data	e responsible treatmer	nt of the data you	report a	nd will take ap	propria	ate steps within th	neir ability to protect the
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First page



- <u>Establishment ID</u>. Since the LDB number is long, we purposely entered an error to see what would happen. An error isn't reported until *Submit* is clicked, which isn't ideal.
- <u>Yellow highlights for errors</u>. Right now, there is yellow highlighting when there is an error to the following fields: *Establishment ID*, *E-mail*, *Zip*, and *Phone*. There are two suggestions:
 - There should be consistency when the highlights pop. The whole row should highlight like it does for *E-mail*.

• There could be more warning than just a color change. We could put "!error" or "Check this" next to the field.

First page continued

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	Please fill out the following form. You can save data typed into this form.	Highlight Fields					
	U.S. Department of Labor Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses,	2009					
	YOUR RESPONSE HELPS KEEP AMERICA'S WO	ORKPLACES SAFE.					
	Refer to the 2009 SOII survey instructions you received in the mail.						
	Enter your 12-digit Establishment ID and e-mail in the fields below. Your Establishment ID can be found on the front right side of the survey instructions you received and will be similar to this:						
	*Establishment ID: 38 -						
	*E-Mail:	Establishment ID: 01-123456789-1					
	*Required to use this form.						
	Enter your company name and mailing address in the fields below.	(SECONDARY COMPANY NAME) REPORT FOR: ADDRESS LINE 1					
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• <u>Word callorts</u>. Will respondents know what *LdbNumber* is? Also, the word callout over state is *StateFipsCode*. Again, will respondents know what this means?

Second page



- <u>Inability to enter decimals</u>. The decimals are wiped out during entry. However, this means that as someone enters "1,000.00" it registers as "100,000" incorrectly. Therefore, the respondent just entered 100 times what he or she meant. Hopefully, respondents check this and it isn't submitted erroneously.
- <u>Callouts</u>. Nice job on the callouts on this page.

- Skip on # 4. In the future, it would be great if a *No* on item 4 would then take the person to • the last page. (We don't know if this may be a programming issue with Adobe.)
- Totals for M1 to M6. It would also be great if in the future, that there is a validity check that • value for *H* matches the totals for *M*1 to *M*6.
- Metadata. As stated earlier, it would be great to capture metadata (e.g., an audit trail). This • would be highly useful in determining which design elements are not working and may lead to data quality or data entry issues.
- Tab key entry.
 - 0 In Section 1, Q3, the tab key moves from option to option (Left to right, then to the next row), and the space bar either selects or deselects the option. That's how we expect check boxes to work.
 - **o** In Section 1, Q4, the tab key takes you to the first option and you use the space bar to make a selection. You then use the arrow keys to change the selection. This is fine for radio buttons.

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	Please fill out the following form. You can save data typed into	this form.			Highlight Fields		
6	 Refer to the OSHA Forms for Reco instruction sheet under "Report for. 	rding Work-Related Inju	uries and Illnesses for the loc	ation referenced on the su	urvey 🔺		
₽	If more than one establishment is n for all of the establishments specific	oted on the survey instru ed.	ction sheet you received in the	he mail, please provide in	formation		
	3. If any total is zero on your OSHA I	Form 300A, enter "0" in	that total's space below.				
	4. The total Number of Cases recorde	d in G + H + I + J must	equal the total Injury and Illı	iess Types recorded in M	(1 + 2 +		
	3 + 4 + 5 + 6).						
	Number of Cases						
	Total number of deaths	Total number of cases	Total number of cases	Total number of other			
		with days away from	with job transfer or	recordable cases			
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	Number of Days	(11)	(4)	(0)			
	Total number of days		Total number of days of job				
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	Injury and Illness Types						
	Total number of						
	(141)						
	(1) Injuries	3	(4) Poisonings				
	(2) Skin disorders	1	(5) Hearing loss				
ile و	(3) Respiratory conditions	2	(6) All other illnesses				
Ø	If you had any work-related deaths in	2009, please tell us in th	e Comments in Section 4 of	this survey where you ass	igned/		
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Note entries. This was done purposely to see if there was an edit. One did appear after • *Submit* was clicked.

Third page – average number of employees

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Pleas	se fill out the following form. You can save data typed into this form.		Highlight Fields
	Steps to estimate annual average num Step 1: To calculate the annual average number of employees your establishment paid during 2009, you must calculate the total number of employees your establishment paid in every pay period during calendar year 2009. Count all employees that you paid at any time during the year and include full-time, part-time, temporary, seasonal, salaried, and hourly workers. Note that pay periods could be monthly, weekly, bi-weekly, etc.	ber of employees for 2009: Example: Acme Construction paid its employees in 12 pay period 2009: Pay Period Number of Employees Paid Per Pay Period 1 30 2 0 3 35 4 37 5 37 6 40 7 43 8 42 9 37 10 35	s during
•	Move the rounding instruction to here to save space. Step 2 Divide the total number of employees (from step 1) by the number of pay periods your establishment had in 2009. Be sure to count any pay periods when you had no (zero) employees. Step 3: Round the answer you computed in step 2 to the next highest whole number. Write that number in the box for	11 12 30 +26 392 (total number of e all pay periods) Pile: Acme Construction had 12 pay periods and paid a total of 3 during these pay periods. 392 divided by 12 = 32.67 Example: Acme would round 32.67 to 33.	mployees paid over 92 employees Align 'all' under 'total'

• <u>Number of Steps</u>. It doesn't seem that three steps are required. Space on the page could be saved by reducing the number of steps, and moving parts of the example. For example:

Example

392 divided by 12 = 32.67 Round up to 33.

• <u>Rewrite of Step 1 Paragraph</u>. Instructions should not be buried in paragraphs. To ensure that they're read or seen, break them out as shown below.

Step 1 (see example for monthly pay periods on right)

- Determine the number of paid employees per pay period.
- Count full-time, part-time, temporary, seasonal, salaried, and hourly workers.
- Sum the number of employees for all pay periods.

Step 2

- Divide the total number of employees from Step 1 by the number of pay periods.
- Round the result to the highest number.

Third page – total hours worked

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	Please fill out the following form. You can s	ave data typed into this form.		Highlight Fields	
•	Steps to estima Step 1: Determine the number of	te total hours worked	by all employees for Example: Of Acme's 33 employees in 20	2009:	
ii D	establishment.		Frample:		
	Determine the number of time employee for a year. employees you calculated	hours generally worked by a full- Multiply the number of full-time in step 1 by this number. This	Each of Acme's 28 full-time er hours per year after excluding non-work time. This works ou	Mention the complete breakdown: 28 fu time, 5 part-time	ull-
	total number of full-time l vacation, sick leave, holid time.	nours worked should exclude ays, and any other non-work	year. 28 fu	all-time employees	
		This implies only full-tin	ne 56,000	000 hours per year total full-time hours	
	Step 3: Determine the number of	employees are of interes	t e: 8 full-time employees	s worked a total of 2,800 hours of	
	your full-time employees.	f regular hours worked by your	overtime during 2009 and 56,0 time employees worked a total	00 regular hours. Acme's 5 part- of 2,715 hours during 2009.	
	non-full-time employee include part-time, seasona	I. (Non-full-time employees I, and temporary employees.)	56,000 full 2,800 ove + 2,715 par	I-time hours from step 2 er time hours rt-time hours	
	Add these numbers to the above. This is the estimat of your employees - full-	e number you calculated in step 2 ed number of hours worked by all time and non-full-time - during	61,515 tota	al hours worked	
%	2009. Write this number previous page.	in Section 1, question 3 on the			
Ø			Page 3 of 8		

• <u>Overly detailed instructions</u>. The instructions seem too fragmented, which could lead to their being ignored. The examples can help convey the instructions. See suggested changes below.

Step 1

- Estimate the hours worked by:
 - Full-time employees
 - Other employees (part-time, seasonal, temporary)
- Include:
 - Overtime
- Exclude:
 - Vacation
 - Sick leave
 - Holidays and any non-work time
- <u>Tying the worksheet to the previous page</u>. If this page was an actual worksheet as opposed to instructions, the data entry fields for this page could then be used to populate items *1* and *2* on previous page.

Fourth page



- <u>Ambiguous instructions</u>. Be clear about the maximum upper limit of cases that are to be reported.
- <u>Instruction for Column H needs a header</u>. Since respondents may skim headings, a critical instruction is buried under the heading *Instructions*, so it could be missed, despite the red box. See suggested change below.

What if you have "no cases away from work?" (Column H is blank)

If you had no cases with days away from work, you are done. Please go to Section 4 and submit your data to BLS.

Fifth page



- <u>Unconventional display of date</u>. The format calls for MM, but that is not what is displayed. For example, it displays "05-May" for May. An alternative would be to use numbers with no zeros. That way, respondents can use the digit to enter the month. Right now, entering "1" could give you one of three months (*10*, *11*, *12*). Obviously, this isn't a show stopper, but it could confuse someone.
- <u>Lack of confirmation</u>. When *Add New Case* was clicked, nothing seemed to happen. The only way to tell was to finally notice the total number of pages incrementing. Can the "page 5 of 6" be highlighted some way when it changes?

- <u>Radio buttons versus checkboxes</u>. For items that are "check all that apply," checkboxes should be used. For items that are "check one," radio buttons (such as Q4 and Q5) should be used.
- <u>*Tab* key entry</u>.
 - O It tabs across the top of the page, through the employee name, title, etc. That's what we expect. Then, you move to Q1, option 1. You can make a selection by pressing the space bar, as with the previous check boxes. However, when you hit the tab key again, you go to the field for "other." Once you make a selection in this question, you can't clear out all the options. To move between the options, you have to use the arrow keys. This question functions like the radio buttons in Q4 above. It should probably use radio buttons anyway.
 - For Q2, the *tab* button moves the cursor down the first column, then down the second. In Section 1, Q3, the cursor moved across the row, then to the next row. We prefer the method in Section 1.
 - When you tab to a date field (month or day), you can press the arrow keys to move through the options. However, to start, you have to hit the down arrow twice to get to 01. The first time, nothing seems to happen. We're not sure why you need to hit it twice.

Last page



• <u>Confirmation email</u>. We didn't see the text of the confirmation email after submitting the data.

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Example of error message for Establishment ID

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ļ	2.	Save Save a copy of this form	Warning: JavaScript Window - BLS 5011 2009 The following errors were found and highlighted in yellow: Error 1 (pg 2): The total number of cases(G + H + I + J) should equal the total				
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Example of other error messages (after Establishment ID error)

• <u>Change the wording of the error message</u>. We should encourage them to fix errors. The default for this is *Yes*, both grammatically and in the highlighting of the button, which is to submit the data anyway. The wording should be something like:

"Would you like to correct your information now? If errors remain, you may be contacted in the future to provide additional information."

• <u>Size of font in error message</u>. It's not easy to read.

Confirmation Page

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Form Submission	Can this say <i>Confirmation of Form</i>	
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Your data have been received by BLS on 12/1/2009 12:19:12 PM.	La cressione -	
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