

## SurveyCTO PDF Guide

The Thrive by Five Index 2024 used SurveyCTO for all data collection, with the exception of the Primary Caregiver Interview for non-enrolled children. SurveyCTO is a computer-assisted telephone interviewing (CATI) platform that enables data collection to be faster, more accurate, and more consistent than traditional paper-based survey instruments.

SurveyCTO applies a defined set of rules to manage common survey features, including skip logic, field constraints, validation checks, and automated calculations. Although this form logic is relatively straightforward within the SurveyCTO environment, it can be difficult to interpret for readers who are unfamiliar with the software - particularly when reviewing the PDF versions of the survey instruments, where logical statements are displayed in technical syntax rather than executed interactively.

The purpose of this document is to support interpretation of the SurveyCTO instruments by explaining the underlying logic and decision rules.

### **Overall structure:**

Each page of the instrument PDFs are organised into rows with three main columns:

- Field: the internal name of the variable used in the dataset
- Question: the text shown to the interviewer or respondent
- Answer: the response options or input type

The order shown in the PDF reflects the logical flow of the form.

### **“Required” fields:**

If a field is marked “required”, the interviewer cannot proceed without entering a response if the field is shown.

### **Conditional display logic (“Relevant when...”):**

SurveyCTO uses conditional logic/relevancies to control when questions or sections appear. In the instruments’ PDFs, this is shown using statements such as:

- “Question relevant when:”
- “Group relevant when:”

These statements mean:

*This question or section is only shown if the stated condition is true.*

The text that appears in between the dollar sign and curly braces (i.e.,  $\{\dots\}$ ) is the field from earlier in the instrument upon which the conditional logic is dependent. In the example below, the field ‘matric’ is only shown if the response to ‘schooling’ was 5

(Completed high school (Grade 12)). Otherwise, the instrument skips to the question after ‘matric’.

Field	Question	Answer
schooling (required)	What is the highest school grade that you have successfully completed?	0 No schooling 1 Grade R/0 2 Some primary school 3 Completed primary school 4 Some high school 5 Completed high school (Grade 12) -2 Refused
matric (required)	Did you pass Grade 12 with a matric/National Senior Certificate?  <i>Question relevant when: \${schooling} = 5</i>	1 Yes 0 No -2 Refused

Note that sometimes relevancies will refer to fields that don’t appear in the PDF versions of the instruments. In these cases the relevancies refer to ‘calculation’ fields that don’t appear as fields to the interviewer but are used internally to control routing, validation, and scoring within the instrument.

### Constraints and validation rules:

Some questions include response constraints, shown in the PDF as statements such as:

- “Response constrained to:”
- logical expressions involving symbols like  $\geq$ ,  $\leq$ , or  $=$ .

These rules define what counts as a valid response. For example numeric limits (e.g. values must fall within a certain range) and consistency checks (e.g. confirming a value if it differs from a previously recorded value). If a response violates a constraint the interviewer is prompted to correct it or a follow-up confirmation question appears.

As with relevancies, constraints can also refer to ‘calculation’ fields.

### Other SurveyCTO form operators and functions

The instruments occasionally use other SurveyCTO expressions. For further information please refer to [this](#) document.