READI

Data Collection User Guide

V2.0 July 2026

Contents

Revision #	Revision Date	Revised Chapters	Reasons for Revision
V1.0	4.24.26		Original Version
V2.0	7.15.26	1,2, 9	Chpt 1 – Added a clarification in Sect D, Step 5 for login.gov duplicate account. Chpt 2 - Added Call Completion = Made Contact, emailing the EDR link, time zones for appts., enhanced record search features, Chpt 9 - Added chapter for Supervisors.

Overview

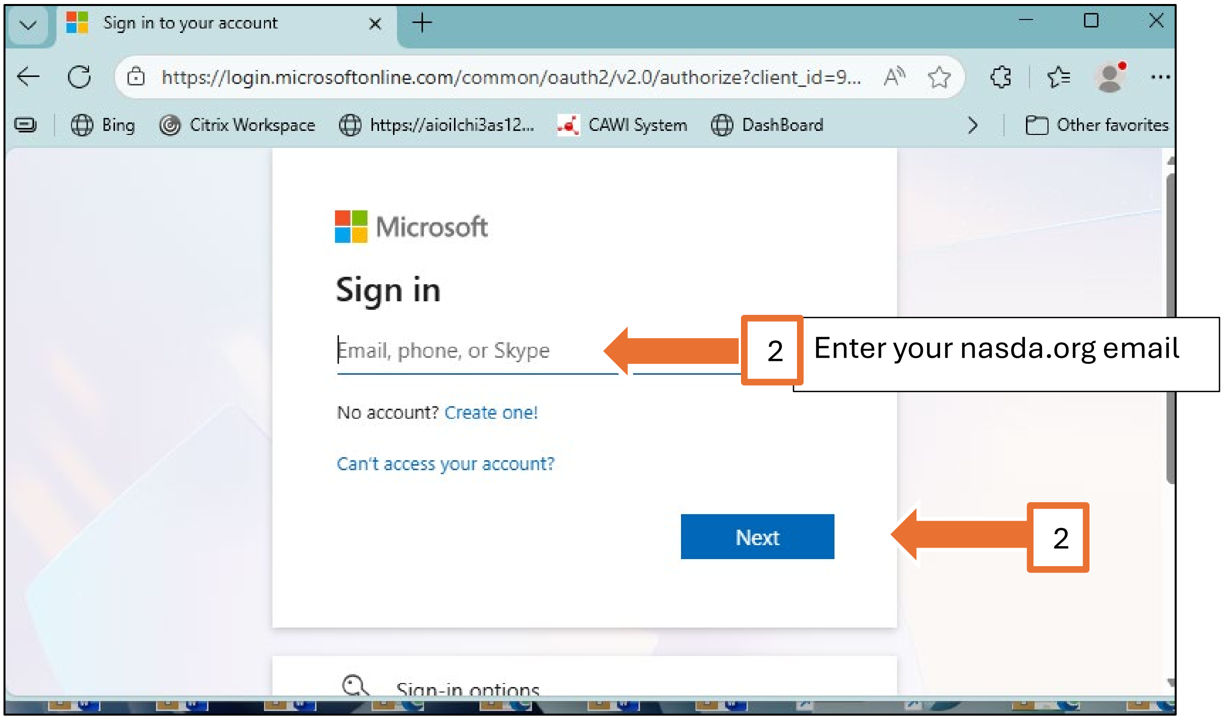
READI is a web-based tool developed at NASS and used by NASDA to collect survey data. It utilizes Zoom to place calls to respondents from a laptop. Enumerators will use Login.gov to authenticate into the system. READI allows call monitoring and recording, collects metrics on call attempts and completions, and provides various information to management to assist with quality control. While READI has many features specifically for management of personnel, Version 1.0 of this manual will focus only on those available to enumerators.

Chapter 1: Initial Setup

There are four steps an employee will need to complete one time as part of the system set up. Management will provide needed information and alert employees when they may start this process. The steps are outlined below in detail in Sections A, B, C, and D.

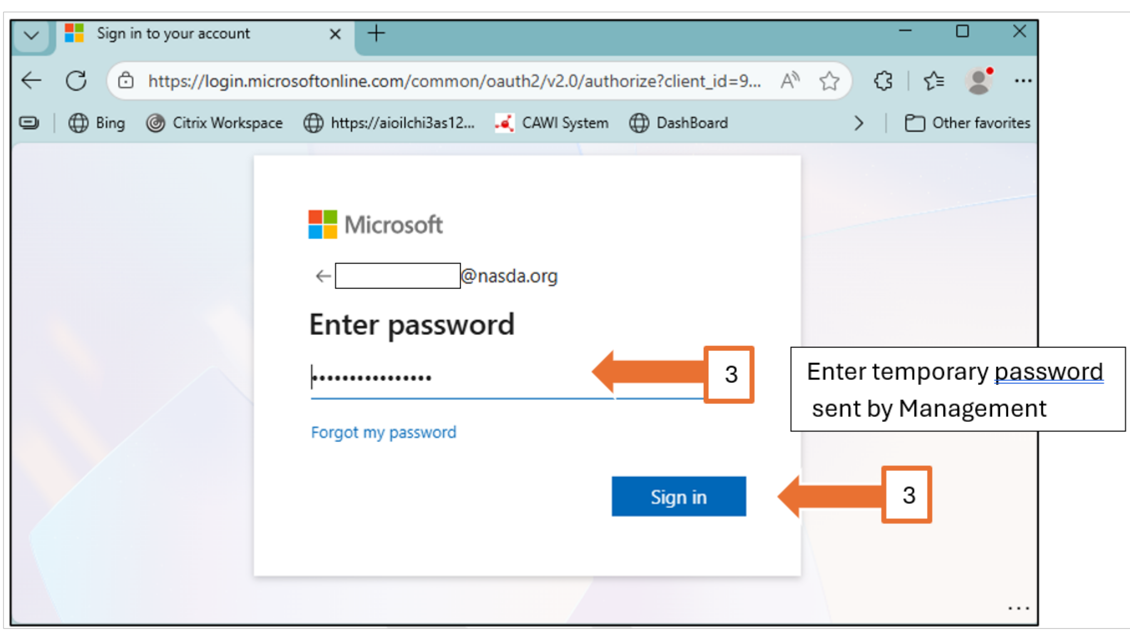
A. Creating an Outlook Work Email Account

1. Open either the Edge or Chrome browsers on your laptop and type **outlook.office.com** or **Microsoft365.com** in the URL.
2. The Microsoft sign-in page will display. Enter your nasda.org email and click ‘Next’.

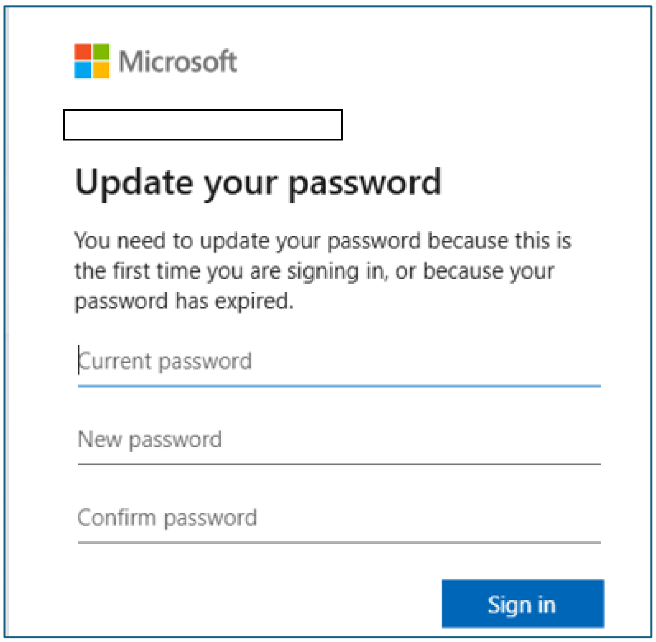


3. Enter the temporary password provided by management and click 'Sign-in'.

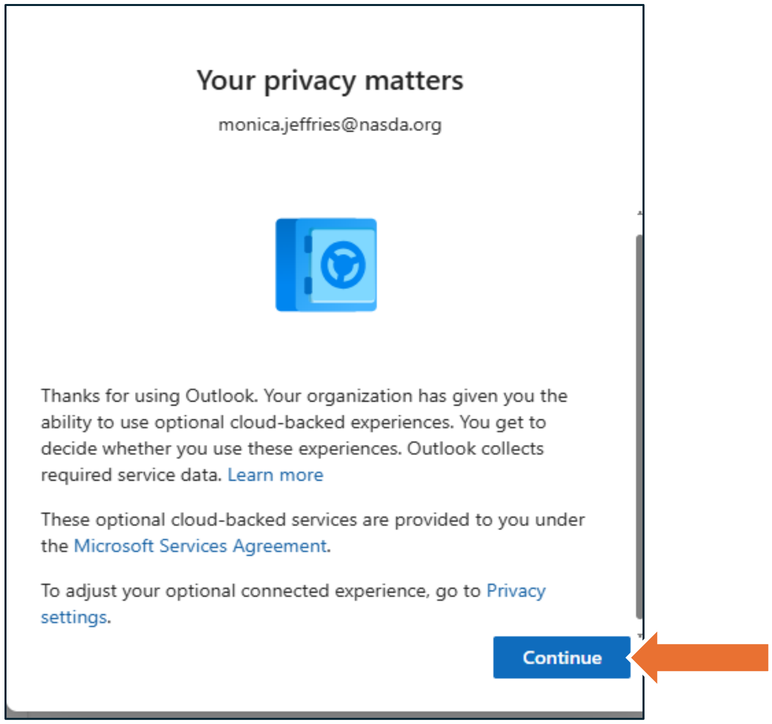
   <u>Helpful hint</u>: It would be best to copy the temporary password from the email and paste it into the screen below.
   <u>Helpful hint</u>: To the right of the password field, there is an "eye" icon. Click to view what you have entered and verify you added the correct password.



4. Once you click "Sign in" the system will prompt you to update the temporary password.
    - Enter your current (temporary) password.
    - Create a new password containing at least ten characters, one upper case, one lower case, and one special character. Retype the new password.
    - Click sign in.
    - **SAVE this password. You will need this password again.**

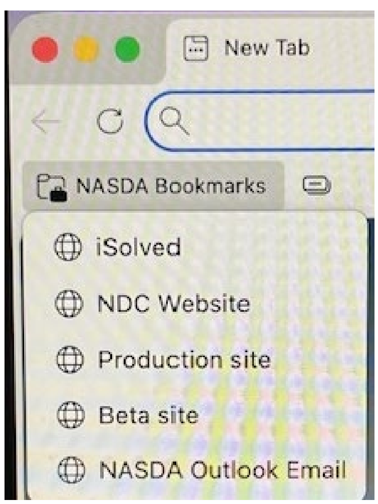


5. Click on 'Continue'



6. **Your Outlook Email Account has now been created.**
   Each time you want to access your email you will go to your browser and navigate to outlook.office.com and enter your email and password.

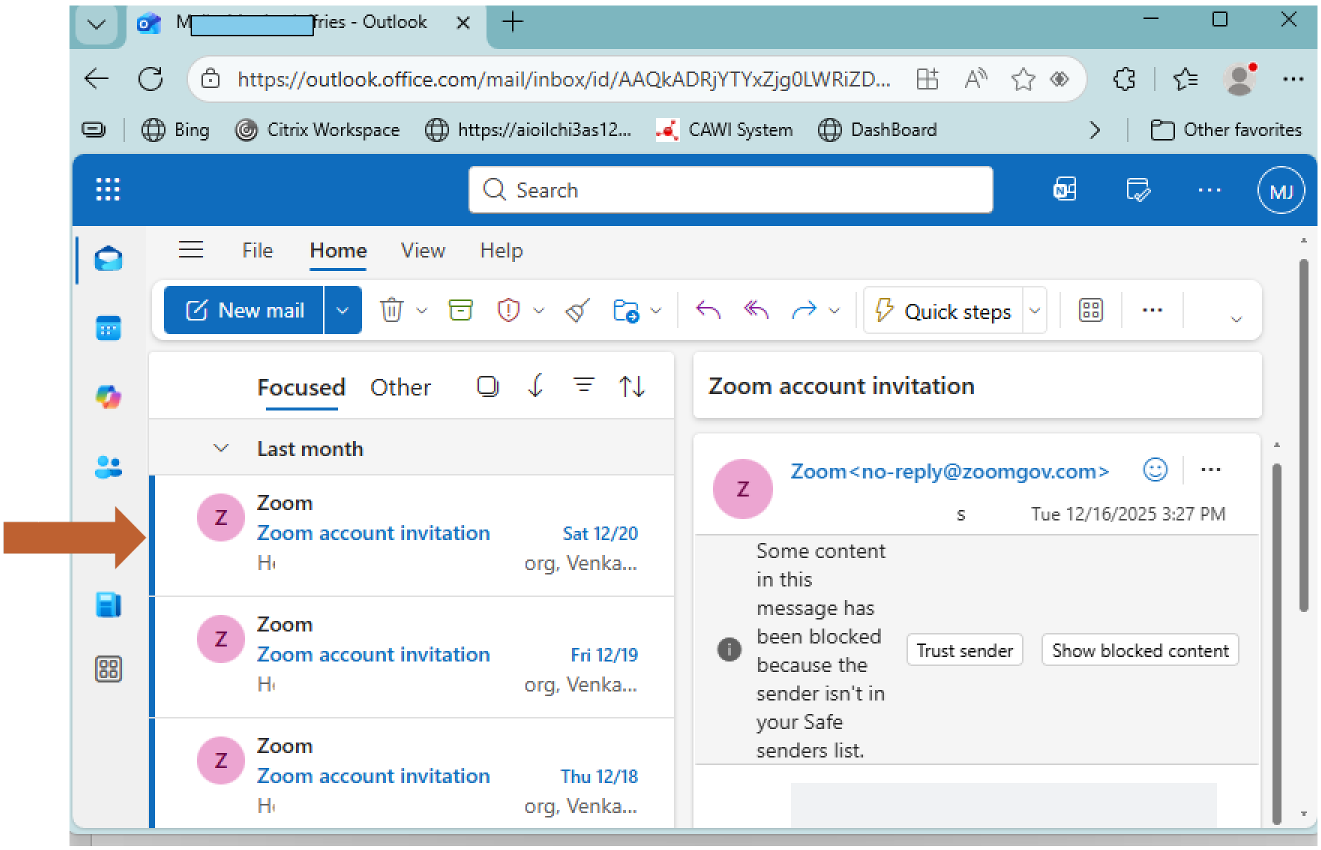
   Note: Bookmarks have been added to your Mac Book. They are under 'NASDA Bookmarks – NASDA Outlook email'.



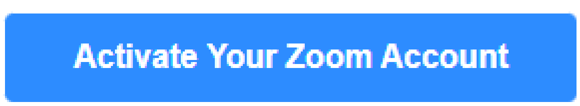
B. Activating a Zoom Account

This Zoom account is used for calling respondents through the READI system. (It is different than the Zoom application used for video meetings)

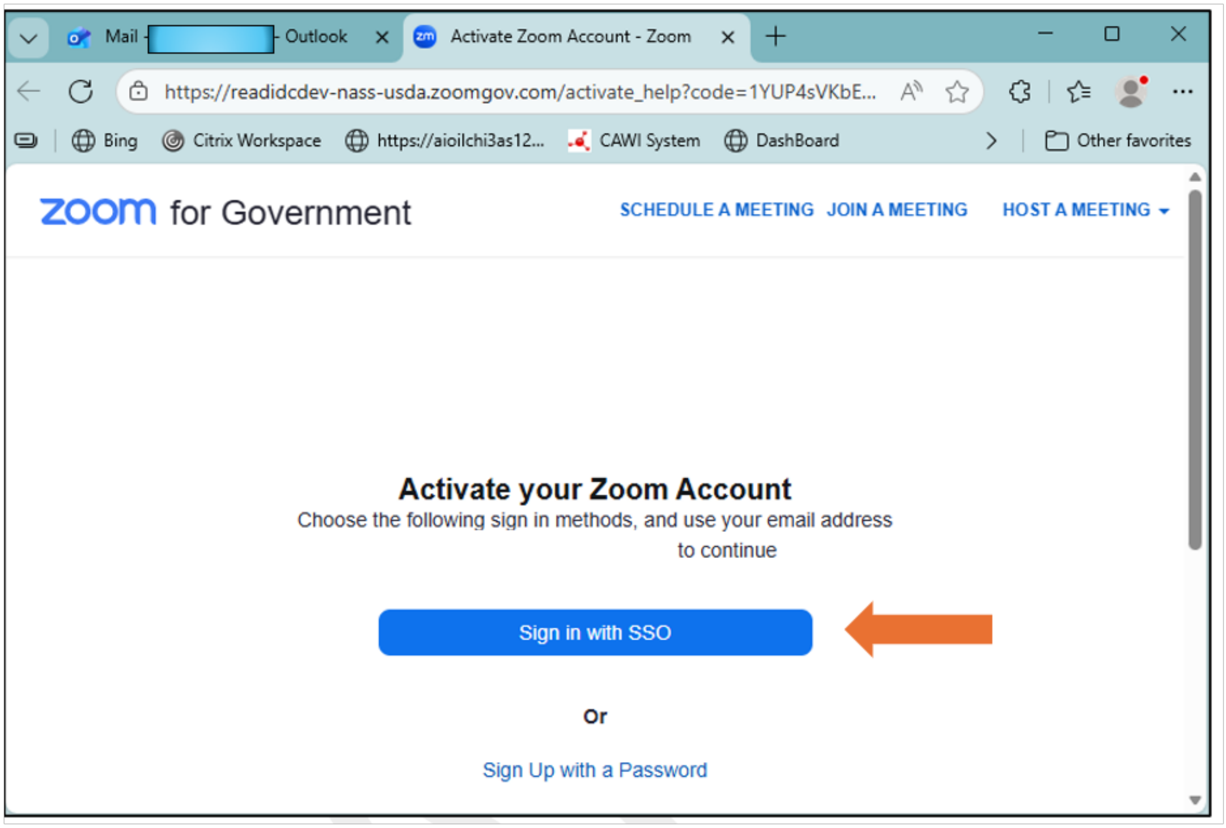
1. Open your nasda.org email. You will see multiple emails with the Subject = Zoom.
2. Find the most recent 'Zoom' email you received.



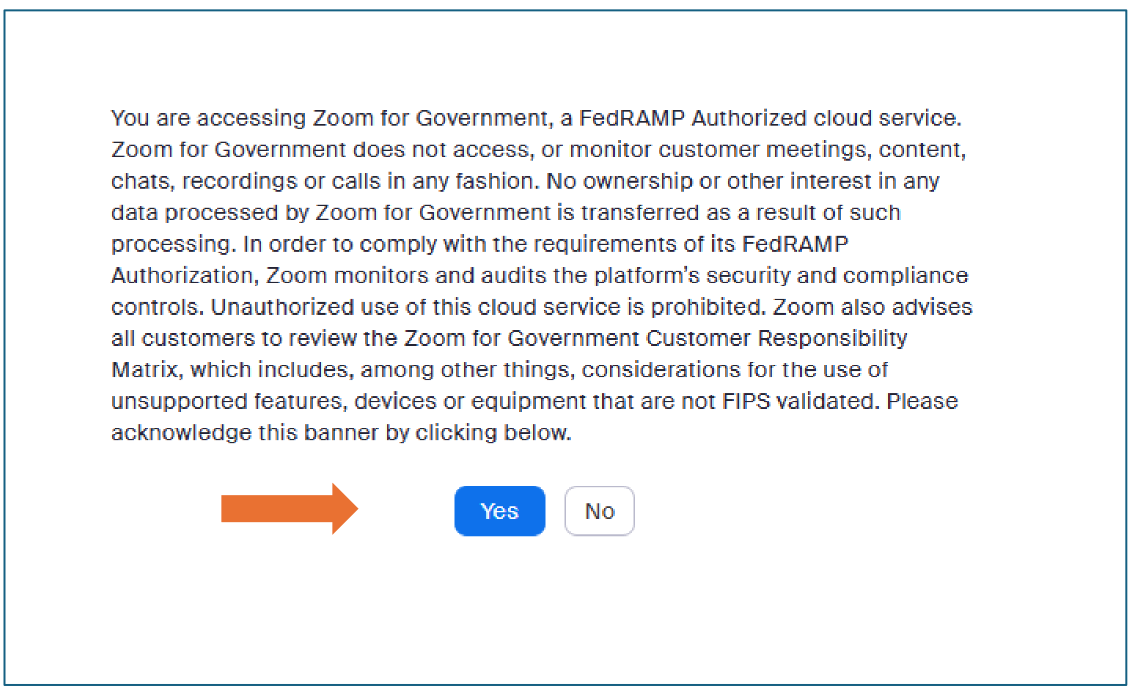
3. Open the Zoom e-mail. Click on 'Activate Your Zoom Account'.



4. Click on 'Sign in with SSO'.



5. Click on 'YES'

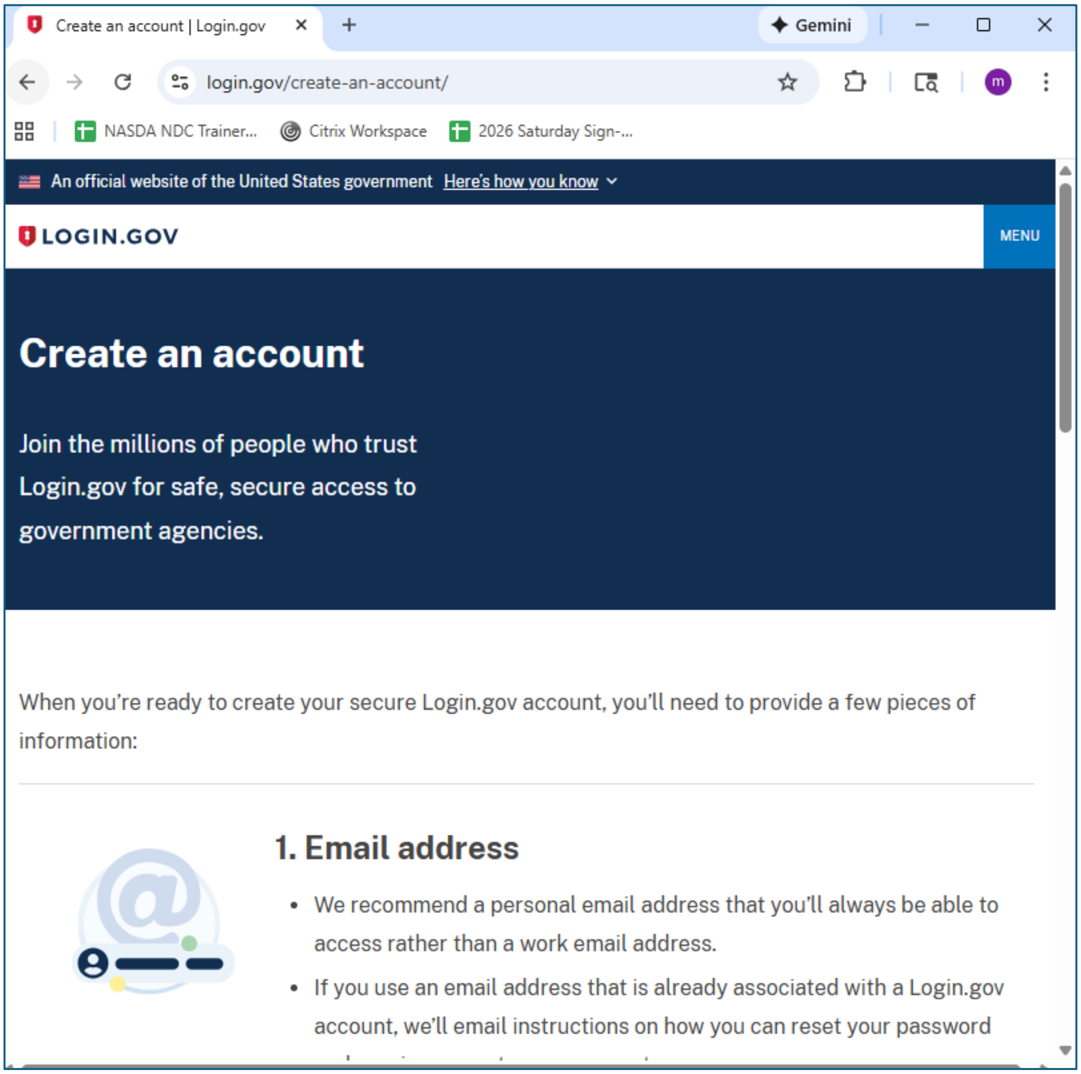


6. Close all screens. **Your Zoom account has been set up**.

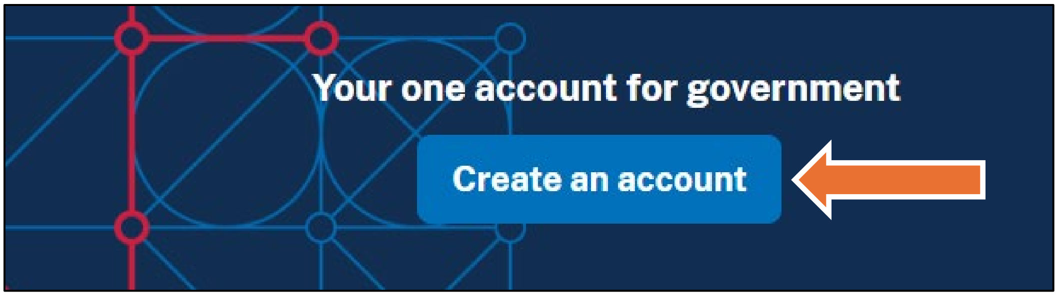
C. Creating a Login.gov Account

Login.gov is used to "authenticate" enumerators using multi-factor authentication (MFA). Each time an enumerator attempts to access READI, they are sent a code on their cell phone to enter on their laptop. Follow these steps to set up the login.gov account.

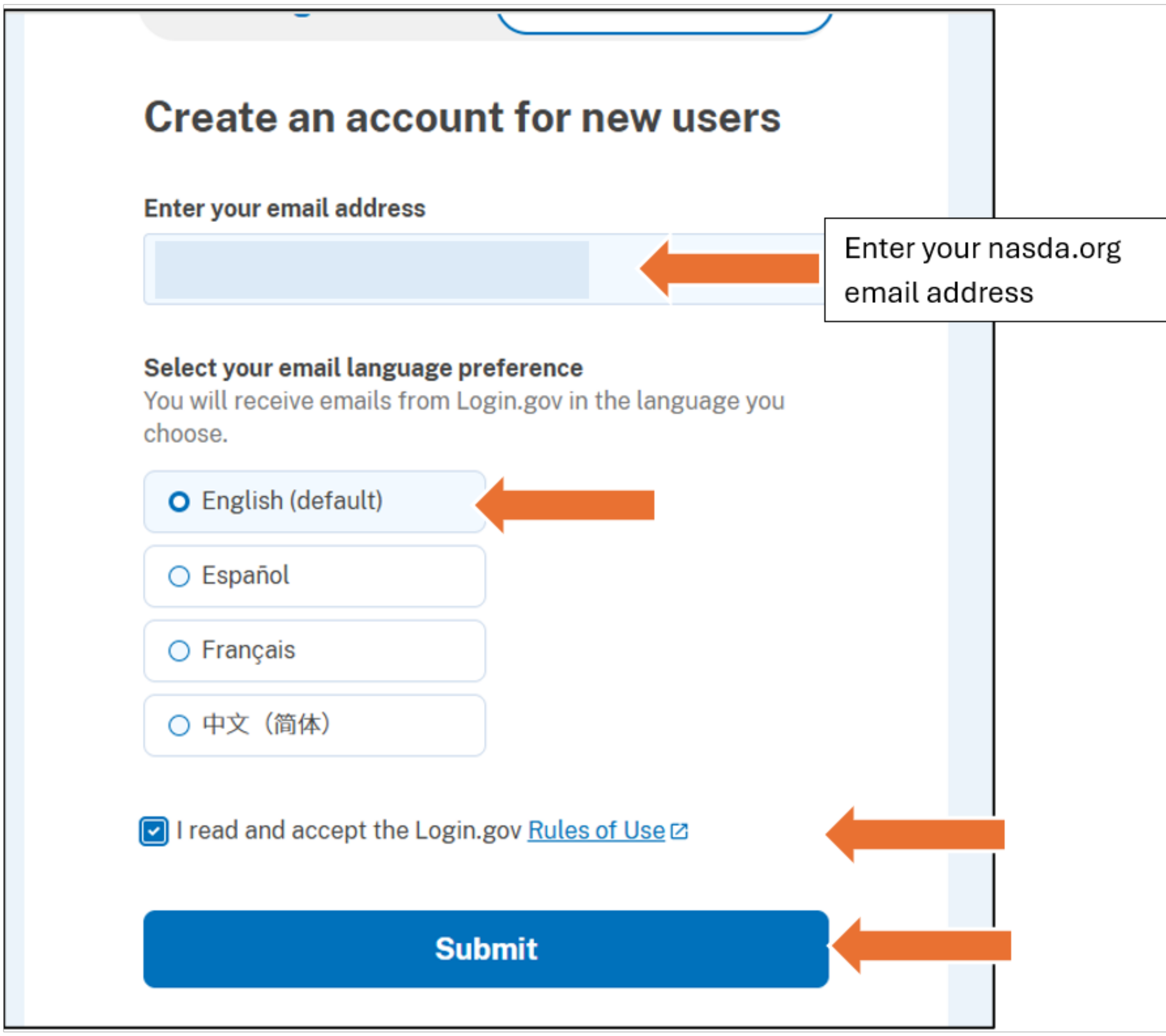
1. Using your laptop, open the Edge or Chrome browser and enter the URL: http://login.gov/create-an-account/.



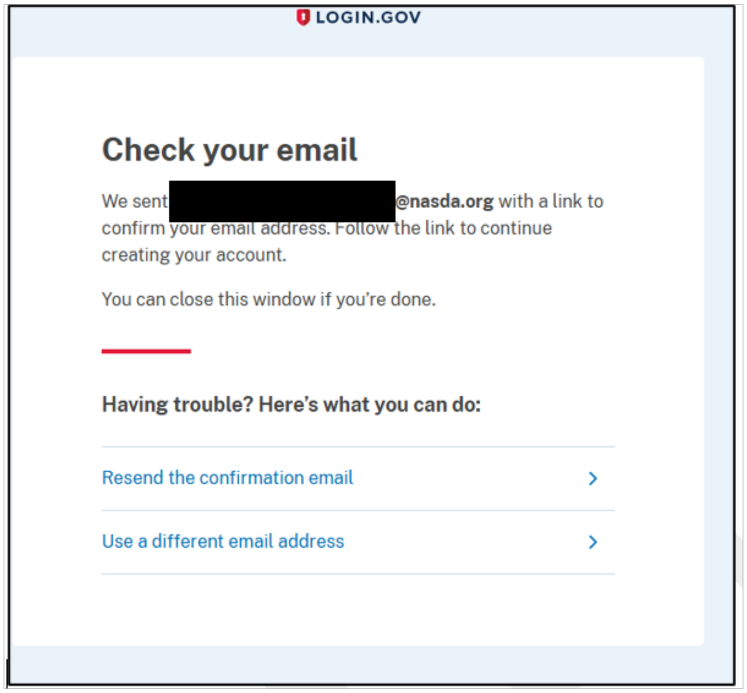
2. Scroll down. Click 'Create an account'.



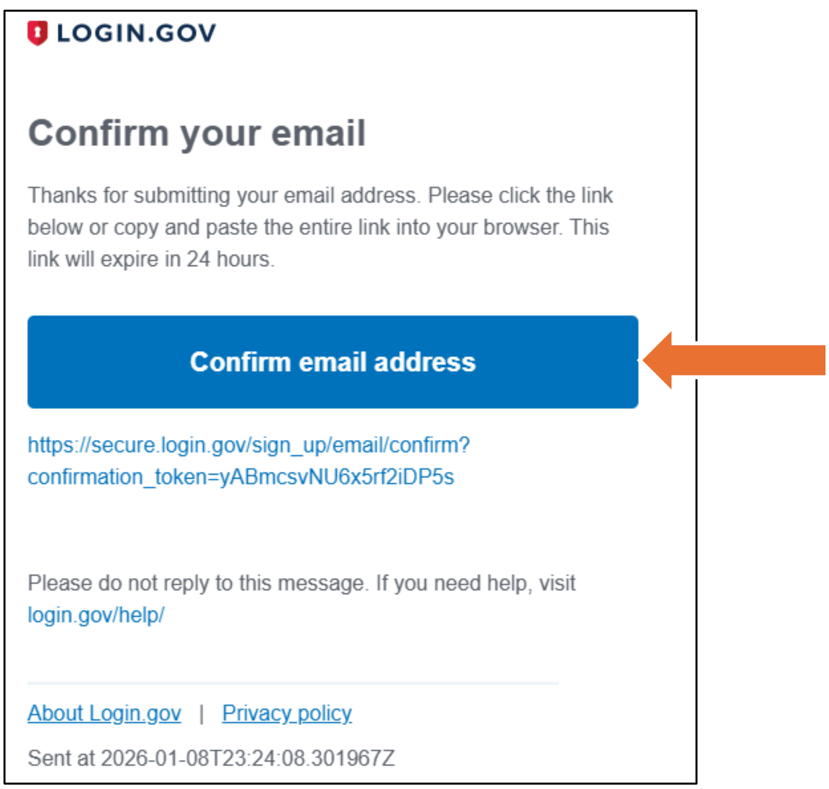
3. Enter your nasda.org email, Select Language Preference, check the box to accept the terms of use, and click on ‘Submit’.



4. The screen will display the following message:



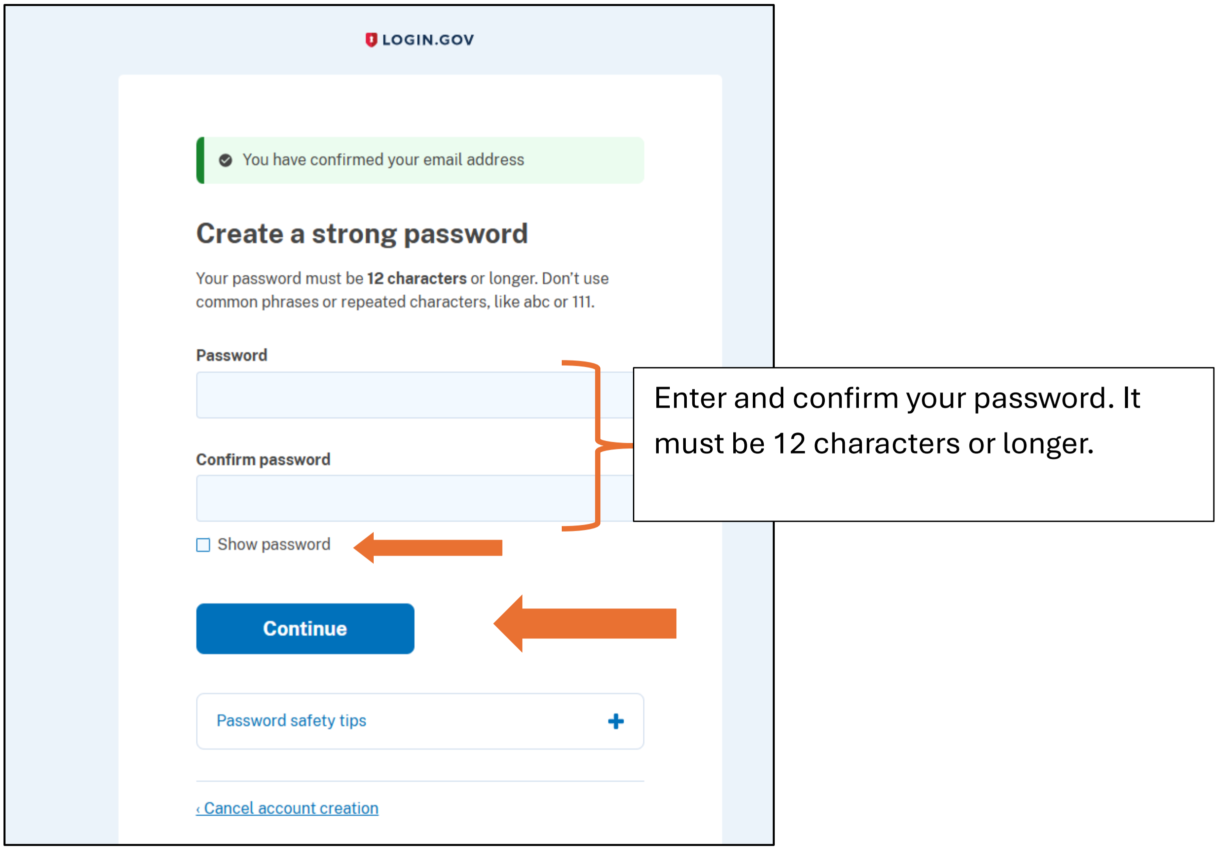
5. Go to Outlook. Open your nasda.org email. The inbox will contain an email from Login.gov. Click on 'Confirm email address'.



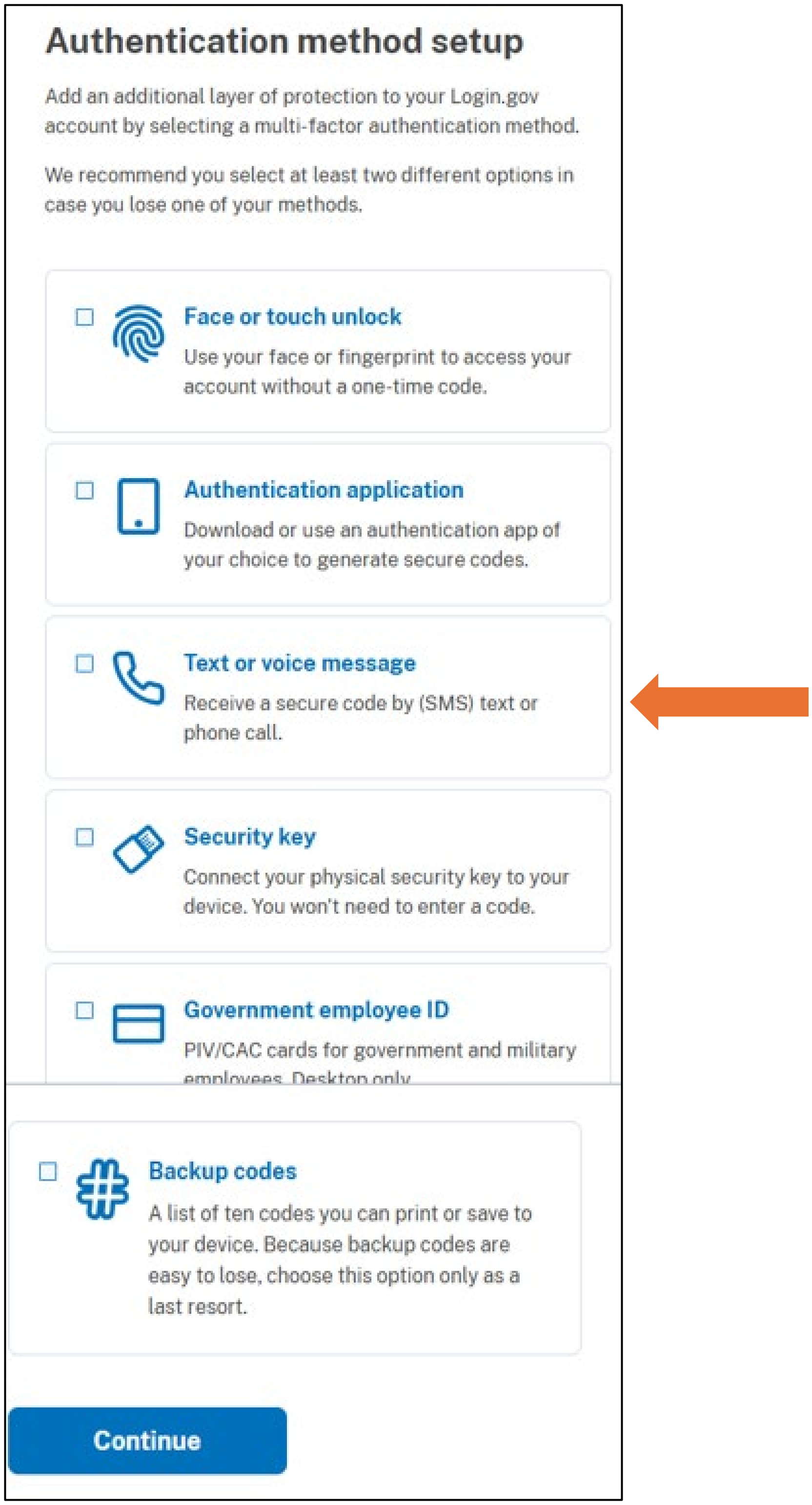
6. You will need to create a password. **It is CRITICAL that you remember your password. WRITE it down. SAVE it and keep it in a safe place**.

   Hint: you can click 'show password' to verify your entry.

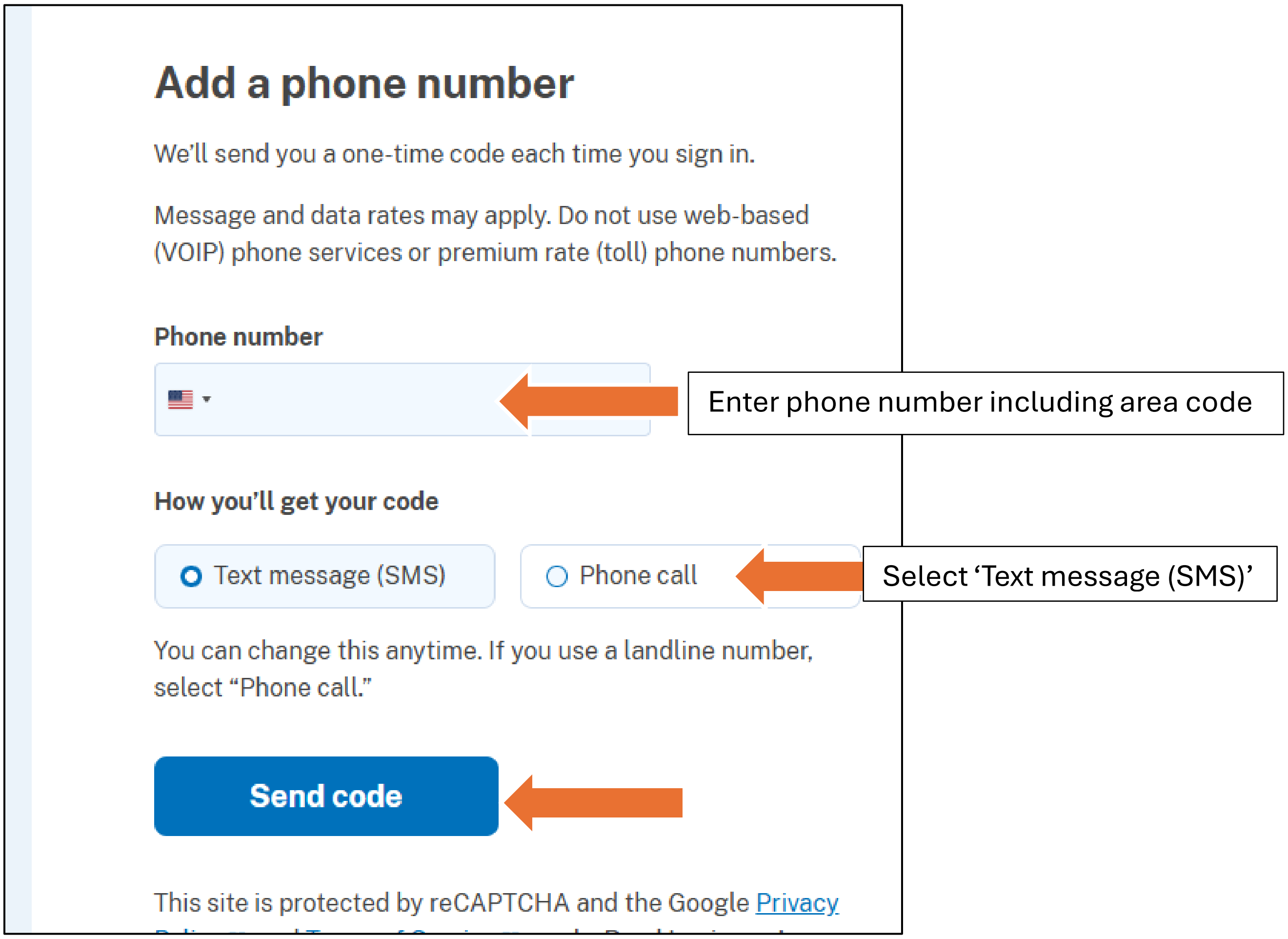
   Click 'Continue'



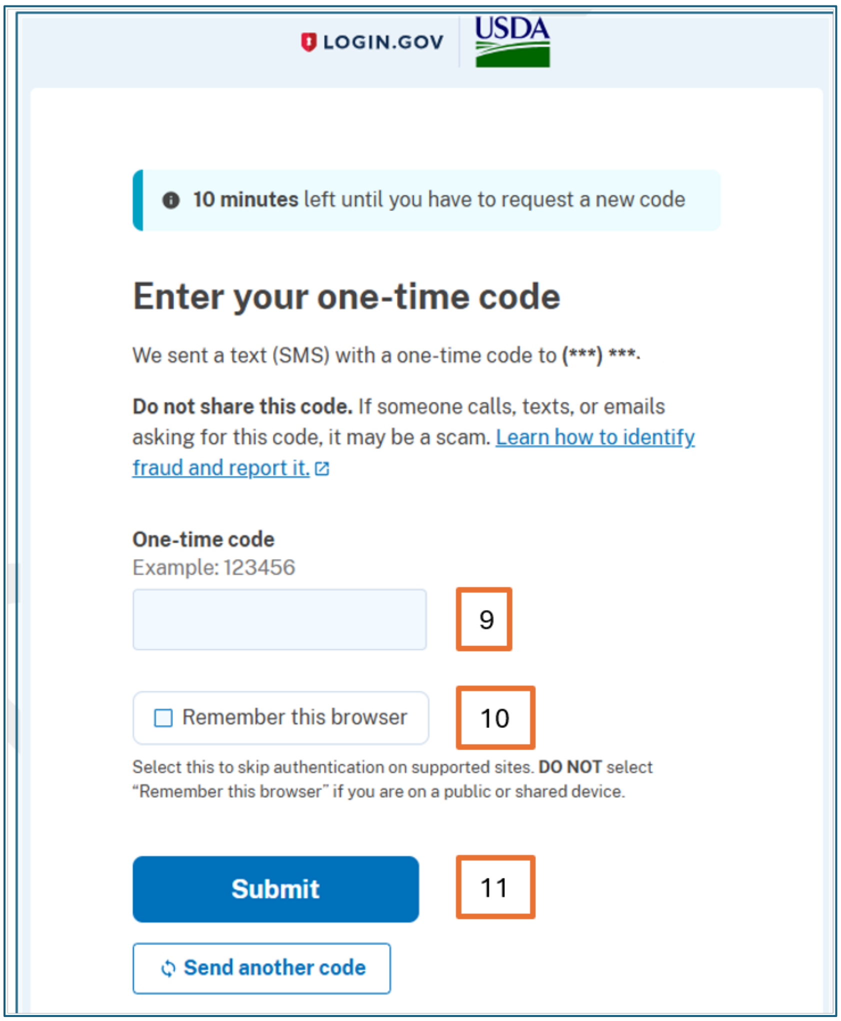
7. Authentication Method Set-up: Select the 'Text or voice message' box and then click on 'Continue'.


Authentication method setup
Add an additional layer of protection to your Login.gov account by selecting a multi-factor authentication method.
We recommend you select at least two different options in case you lose one of your methods.
Face or touch unlock
Use your face or fingerprint to access your account without a one-time code.
Authentication application
Download or use an authentication app of your choice to generate secure codes.
Text or voice message
Receive a secure code by (SMS) text or phone call.
Security key
Connect your physical security key to your device. You won't need to enter a code.
Government employee ID
PIV/CAC cards for government and military employees. Desktop only.
Backup codes
A list of ten codes you can print or save to your device. Because backup codes are easy to lose, choose this option only as a last resort.
Continue

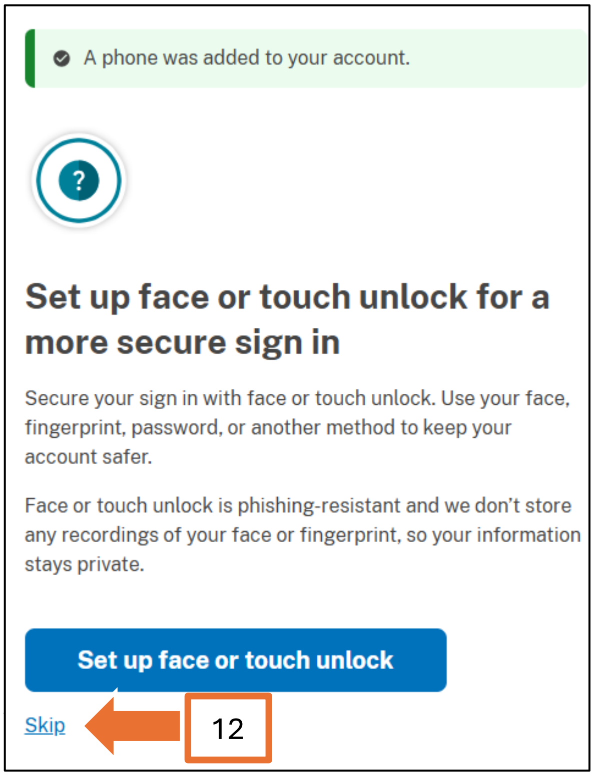
8. Add your telephone number (including area code), choose ‘text message (sms), and click on ‘Send Code’.



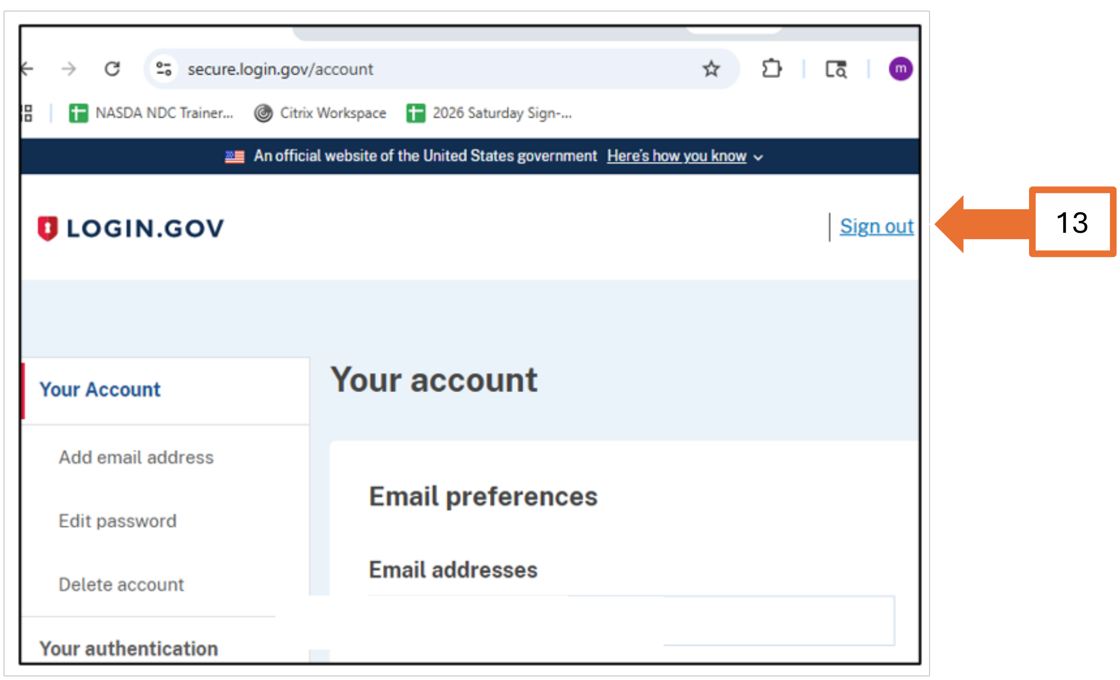
9. The phone number just entered will receive a one-time code. The code will expire in 10 minutes. Enter that code on the computer. If you wait longer than 10 minutes, please see at the bottom of the screen ‘Send another code’.
10. Select ‘Remember this Browser’ to skip authentication on supported sites. **DO NOT** select “Remember this browser” if you are on a public or shared device.
11. Click ‘Submit’



12. Click on ‘Skip’.



13. **You have now created a Login.gov account**.
    Exit properly by clicking ‘Sign-out’.

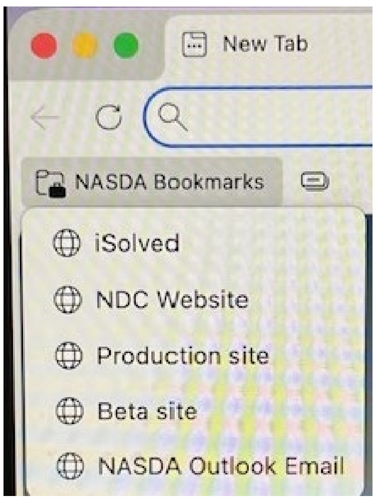


D. Linking Login.gov to a READI Account

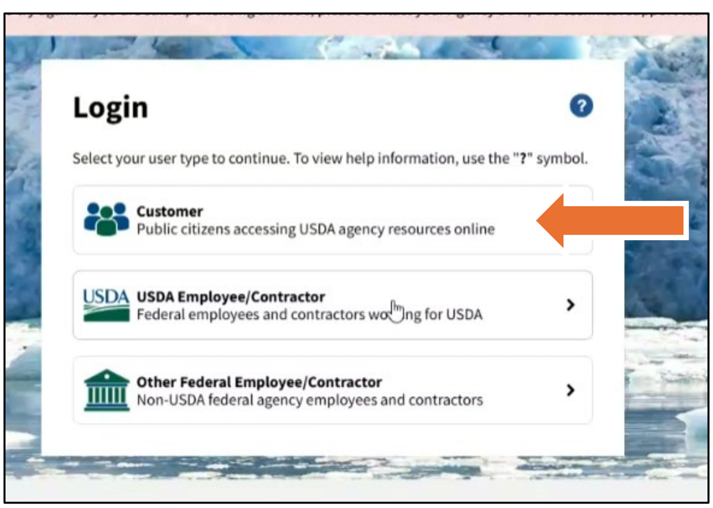
The last step is to link your login.gov account to the READI system. Have your Driver's License available as you will need it during the sign-up process.

Open your Internet Browser. (Google Chrome is recommended.) Type in READI.NASS.USDA.GOV and hit 'Enter'. The Agriculture Counts logo will appear and the screen will spin momentarily.

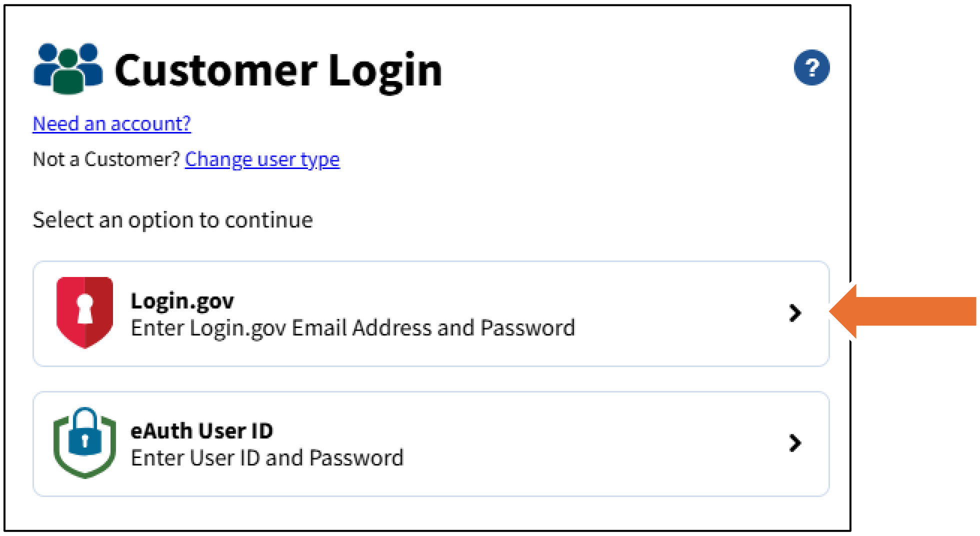
Note: Bookmarks have been added to your Mac Book. They are under 'NASDA Bookmarks – Beta Site or Production Site' depending on which you are wants to access.



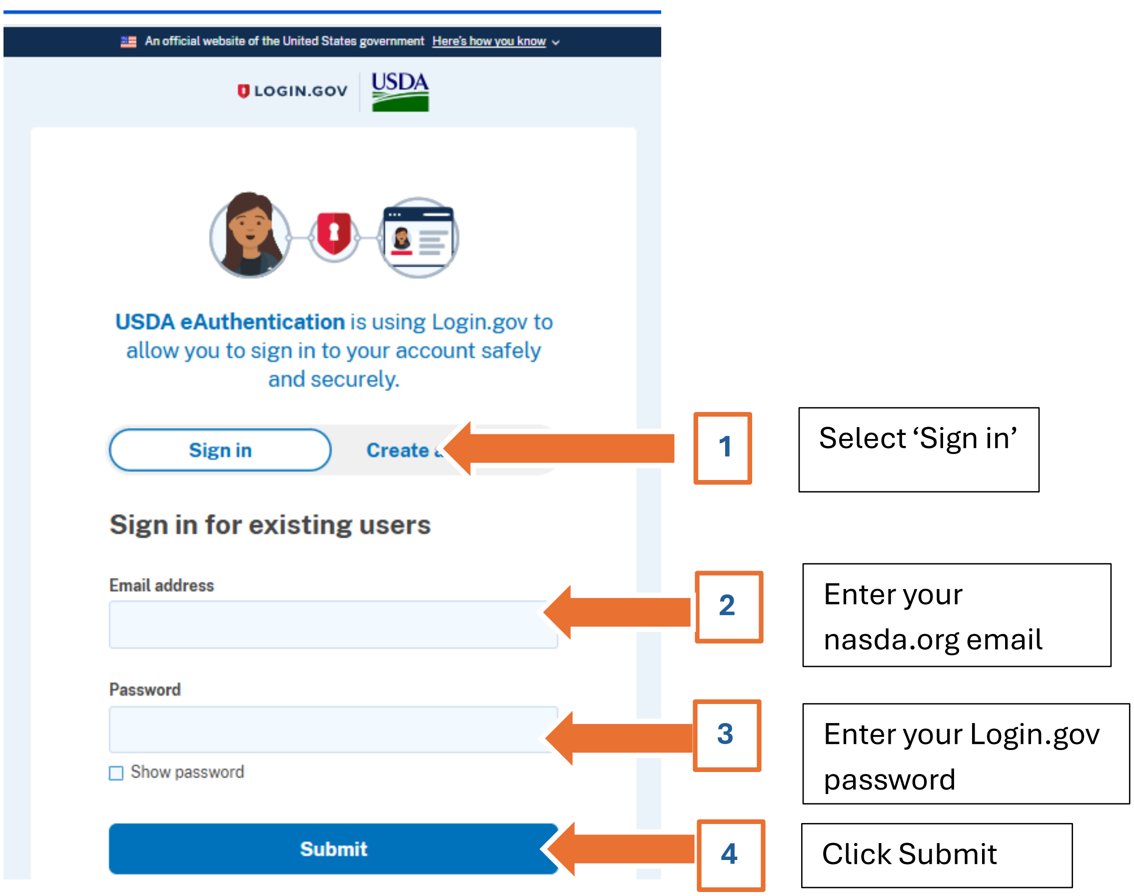
1. When the login page loads, click on 'Customer'.



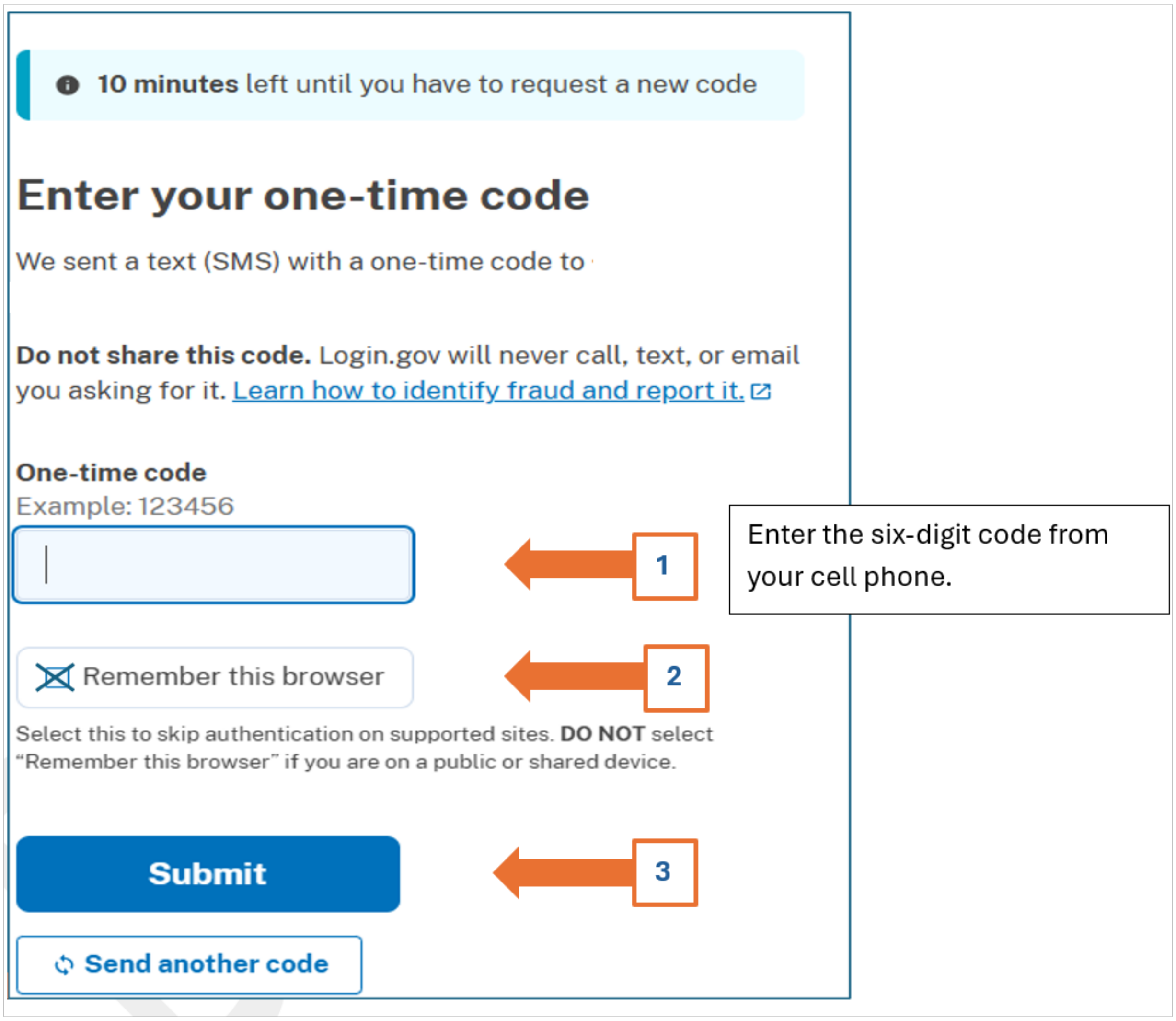
2. Click on 'Login.gov'.



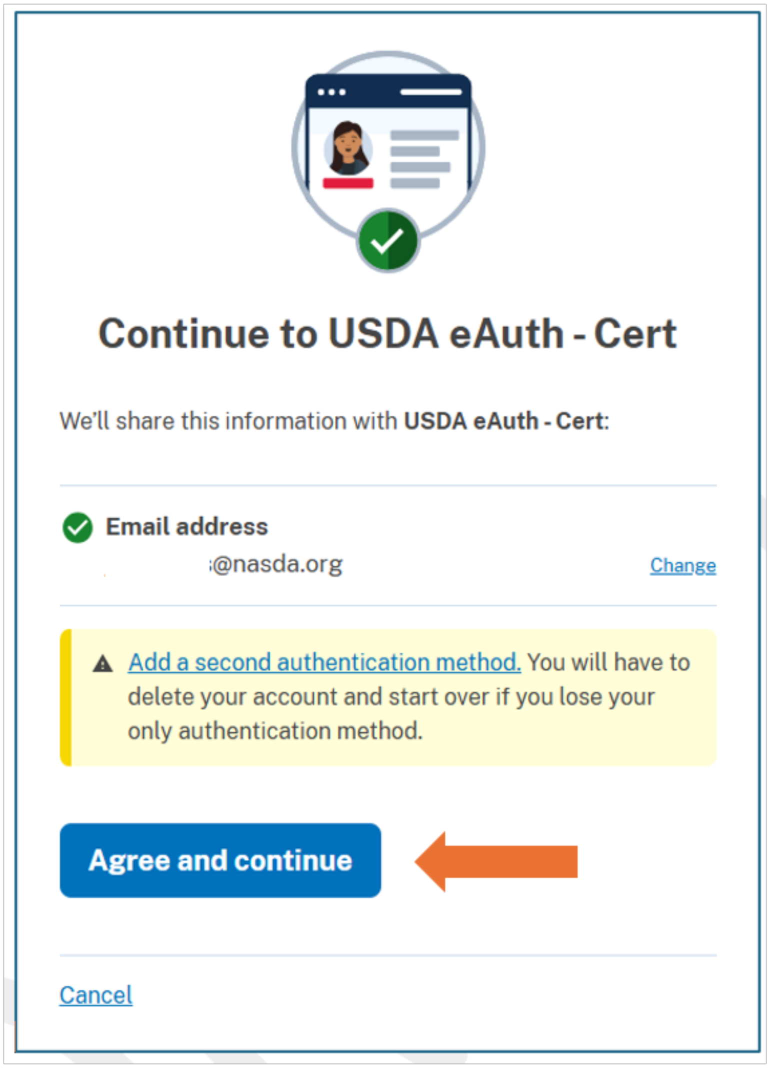
3. Click on 'Sign in'. Follow steps 1-4 as indicated on this graphic.



4. The system will send a code to your cell phone as that is what you selected when you set up your Login.gov account. Look at your cell phone and enter the six-digit code. The code will expire in 10 minutes. If you wait longer than 10 minutes, please click 'Send another code' at the bottom of the screen.

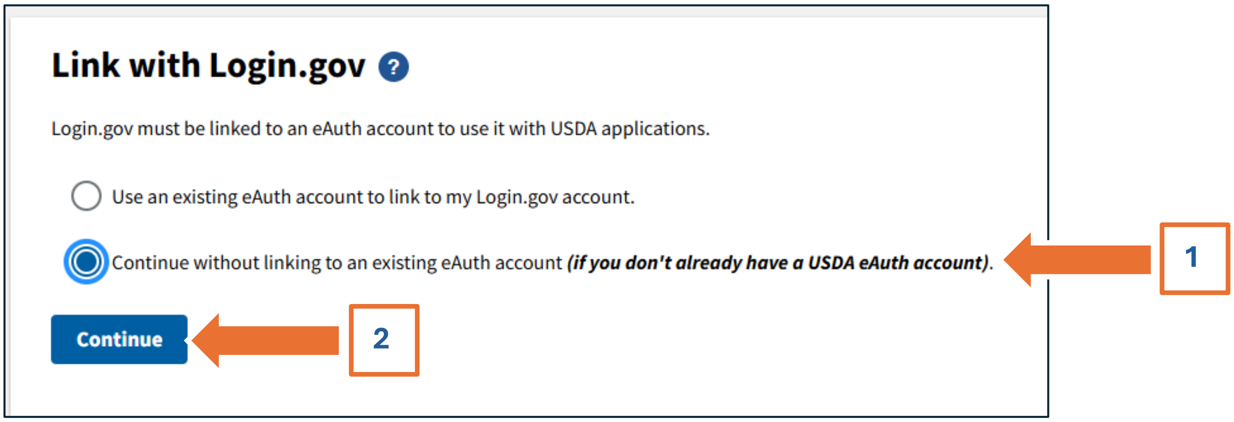


5. Click on ‘Agree and Continue’.

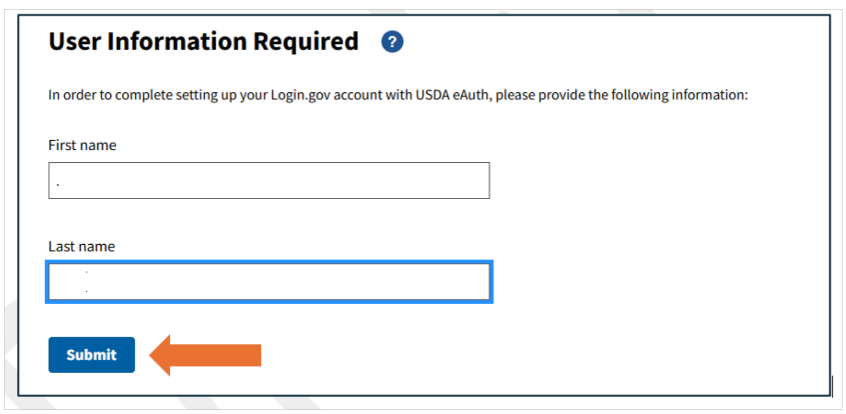


Note: If you receive a message indicating you have a duplicate Login.gov account, you will not be able to proceed until the older duplicate account is deleted. (To delete, you must log into that account. If you do not know the password to login, you must use the forgot password option and follow the instructions on how to regain access to that account. Once logged in, go to the menu on the left side of the screen, select ‘Delete your account/Delete account’, and confirm the deletion by entering your password or following the final prompt.)

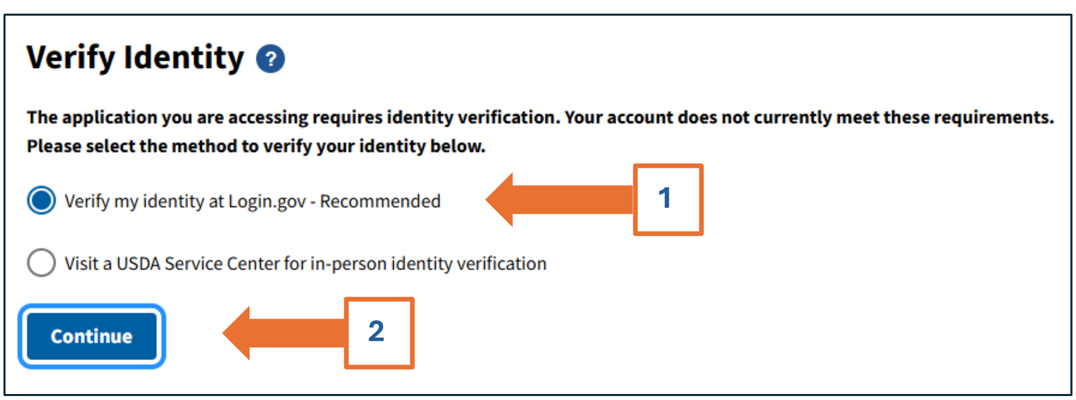
6. Select ‘Continue WITHOUT linking to an existing eAuth account’.
   Click ‘Continue’.



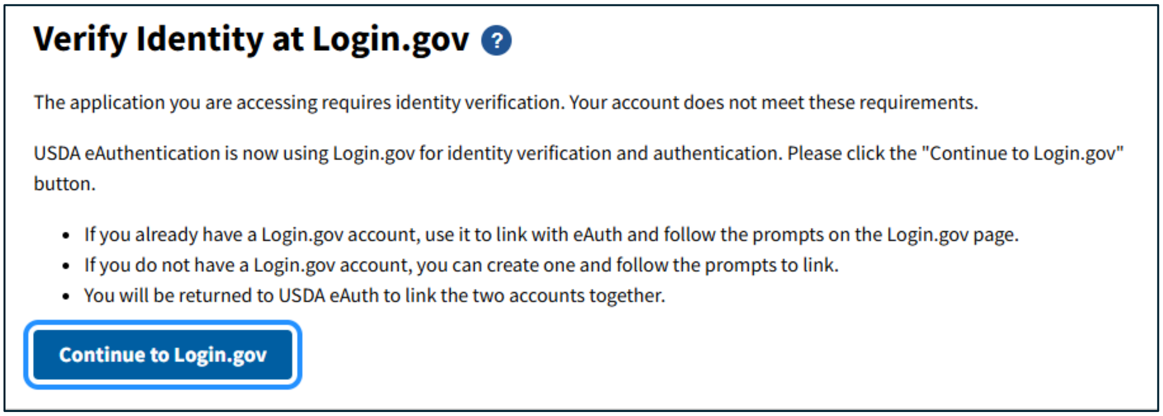
7. Enter your first name and last name. Click submit.



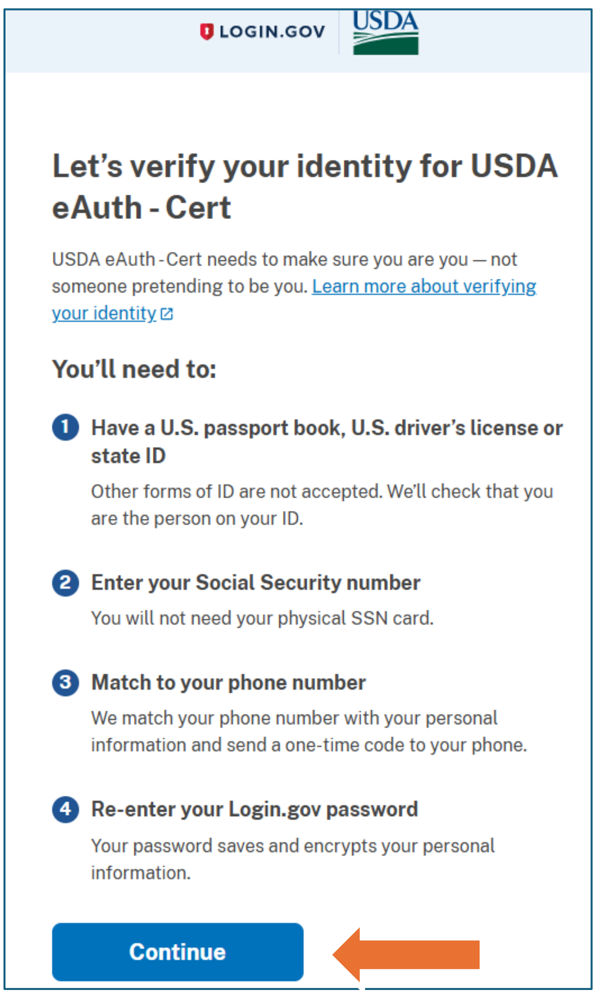
8. Select ‘Verify my identify at Login.gov – Recommended’.
   Click ‘Continue’



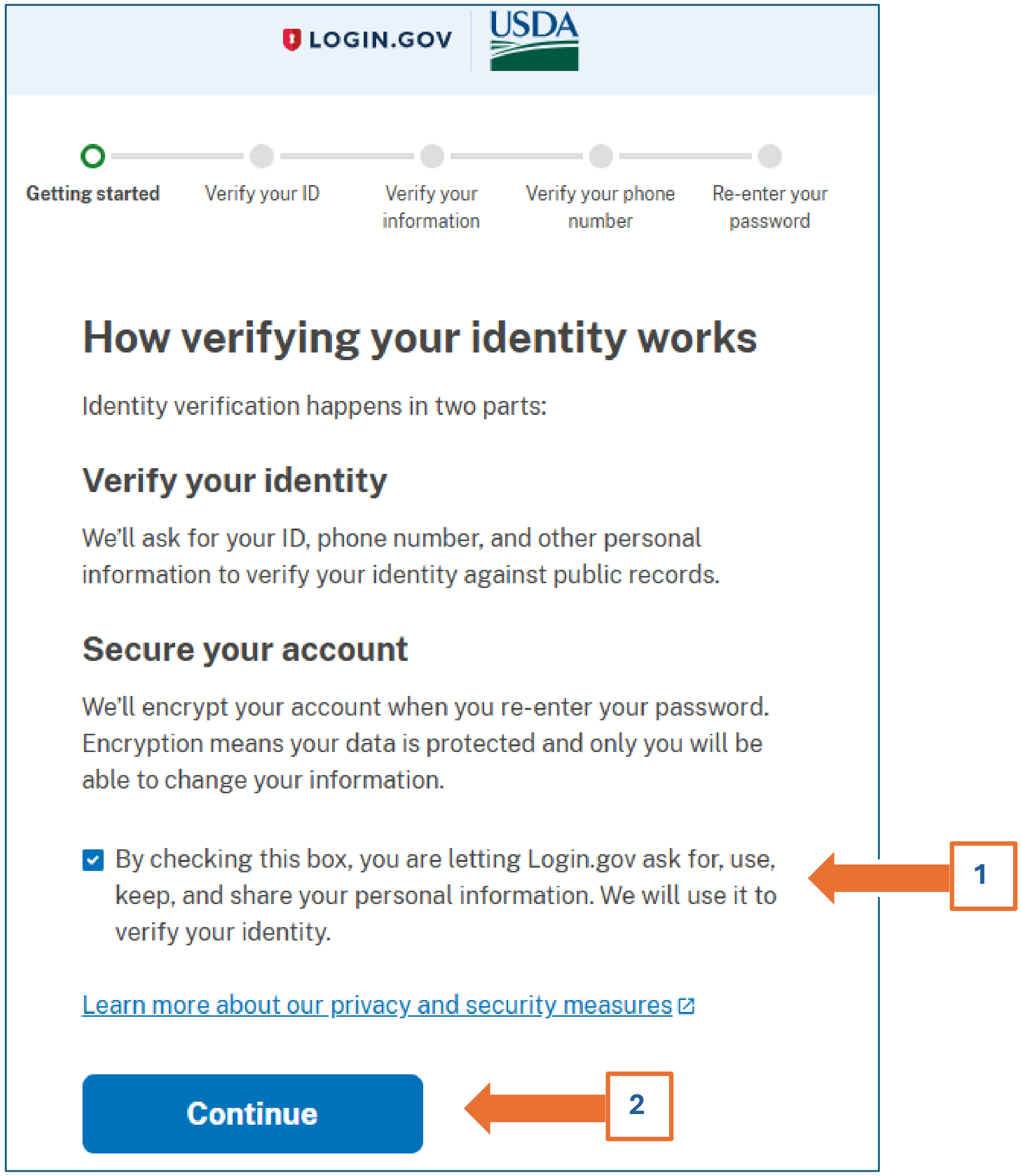
9. Click on ‘Continue to Login.gov’.



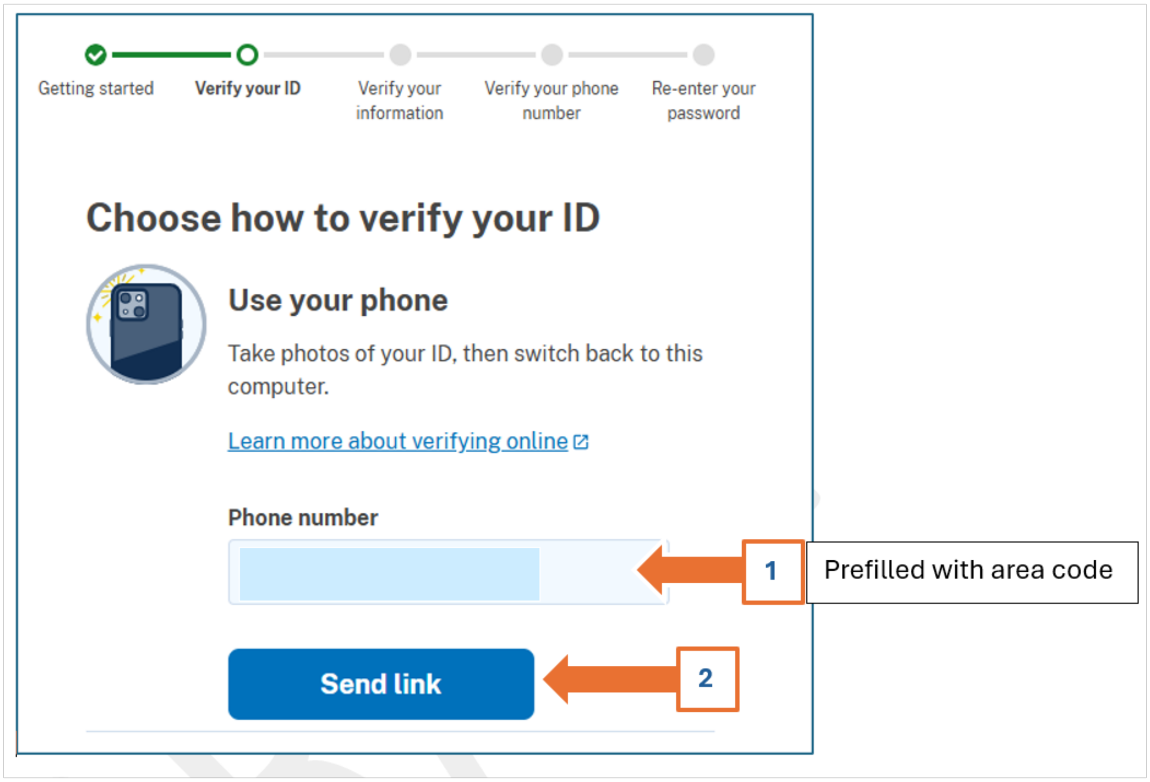
10. Click on ‘Continue’.



11. Check the box allowing Login.gov to verify your identity. Click ‘Continue’.



12. These next steps will verify your identity. Your phone number will be prefilled. Click on 'Send link.'



13. **ON YOUR CELL PHONE**: A link will be sent to you via text message to your cell phone. Click on the secure link. Choose to verify identify using your U.S. Driver's license or State ID. During this step you will be asked to take a picture of your driver's license. Take a picture of the front, then the back. Click on 'Submit'.

    It is recommended you use your driver's license. The sheen on the passport causes a glare making it hard to align and take a picture acceptable by the system.

14. It will take a few minutes for your picture to process. Your computer screen will appear as below. Once done your computer screen will automatically change and ask for your SSN.

LOGIN.GOV USDA

Getting started | **Verify your ID** | Verify your information | Verify your phone number | Re-enter your password

Do not close this window. The next step will load automatically after you verify your ID on your phone.

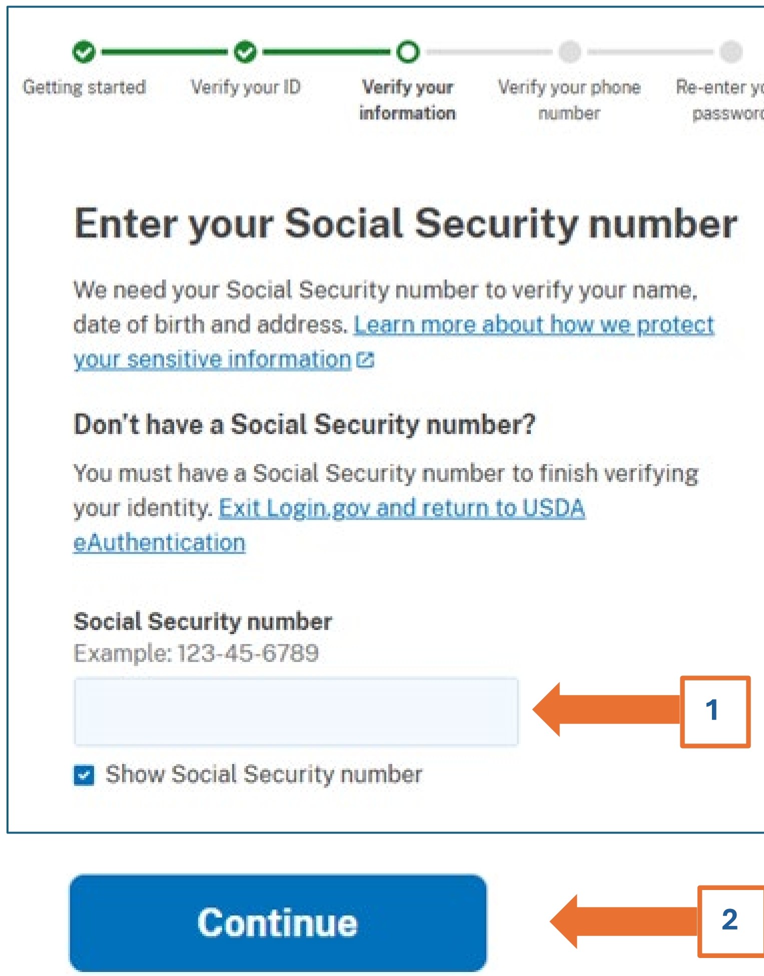
We sent a message to your phone

You entered: **+1** [redacted]

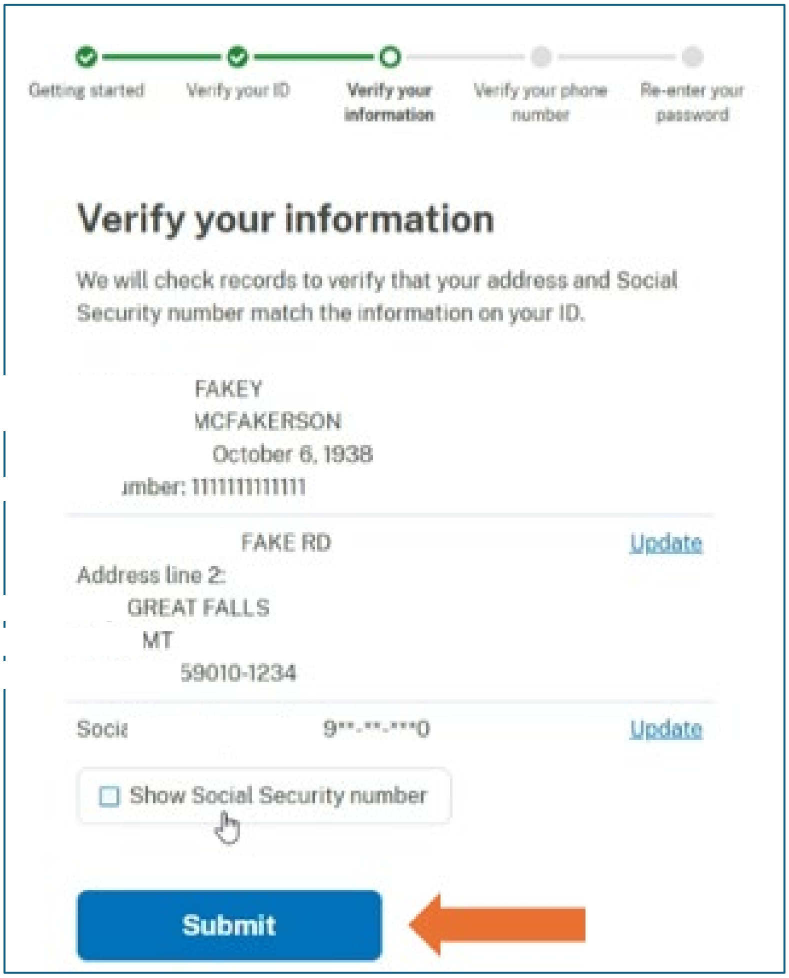
Please check your phone and follow instructions to take a photo of your ID.

‹ Back

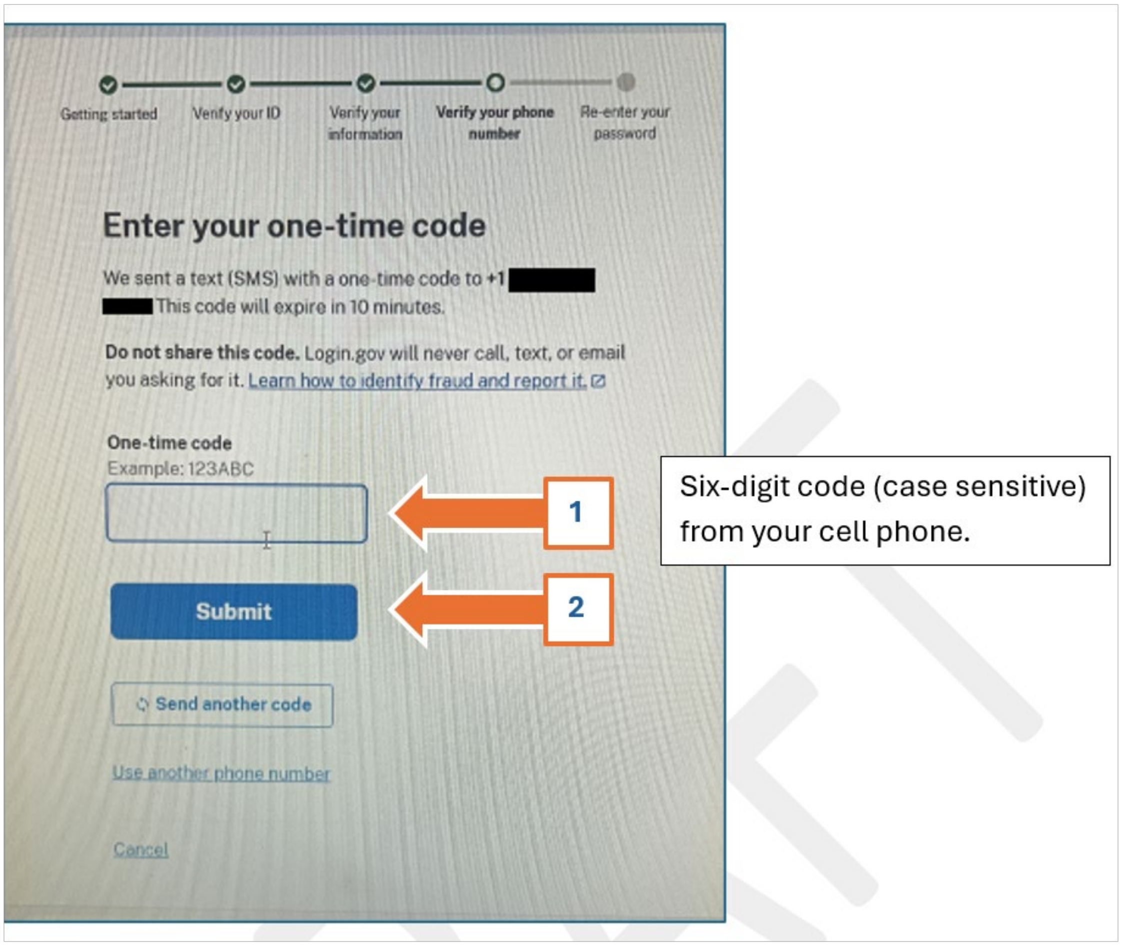
15. Enter your SSN.
    Click ‘Continue’.



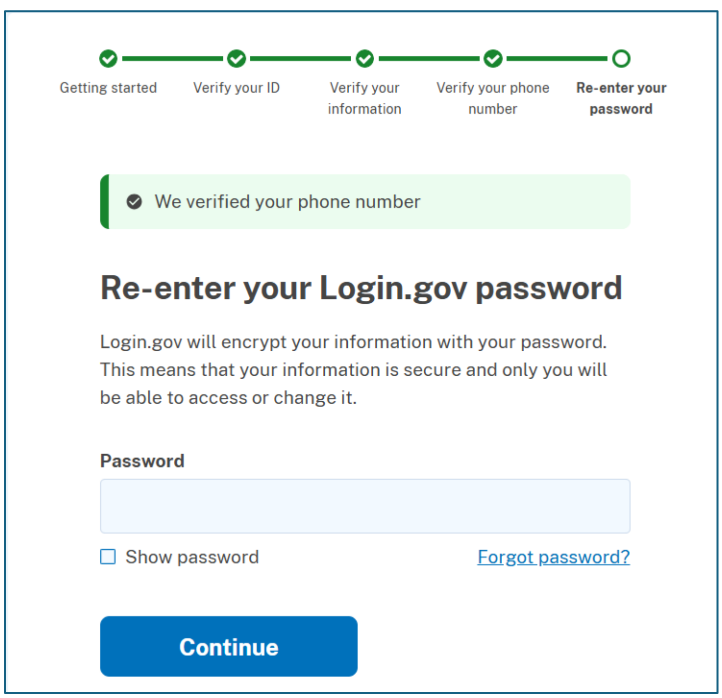
16. Verify the information below is correct. Click ‘Update’ if something is incorrect. Click ‘Submit’.



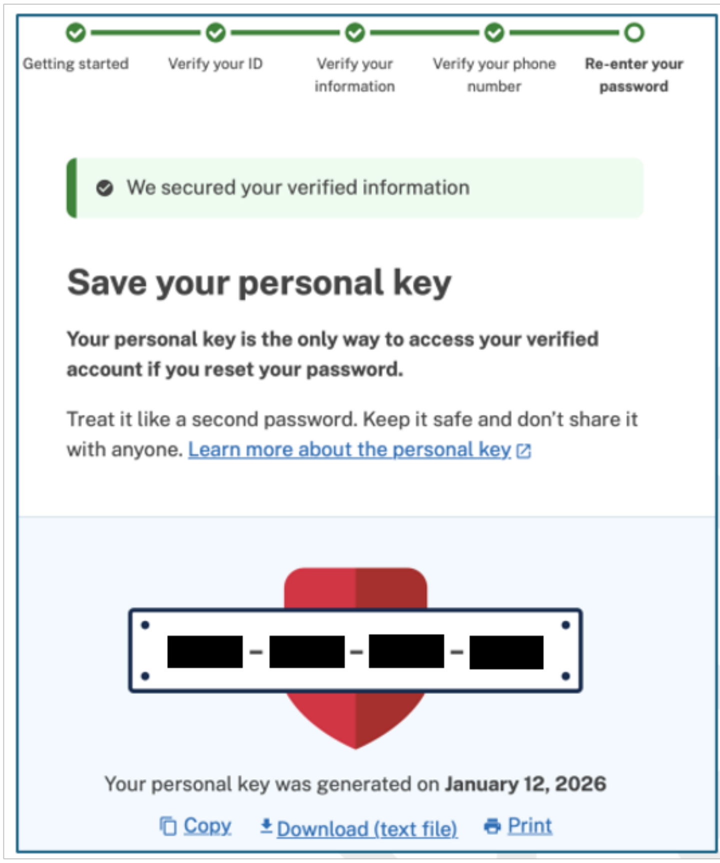
17. A six-digit code will be sent to your cell phone. Enter the code from the cell phone. Click on Submit.



18. On the next screen re-enter your Login.gov password. Click on ‘Continue’.



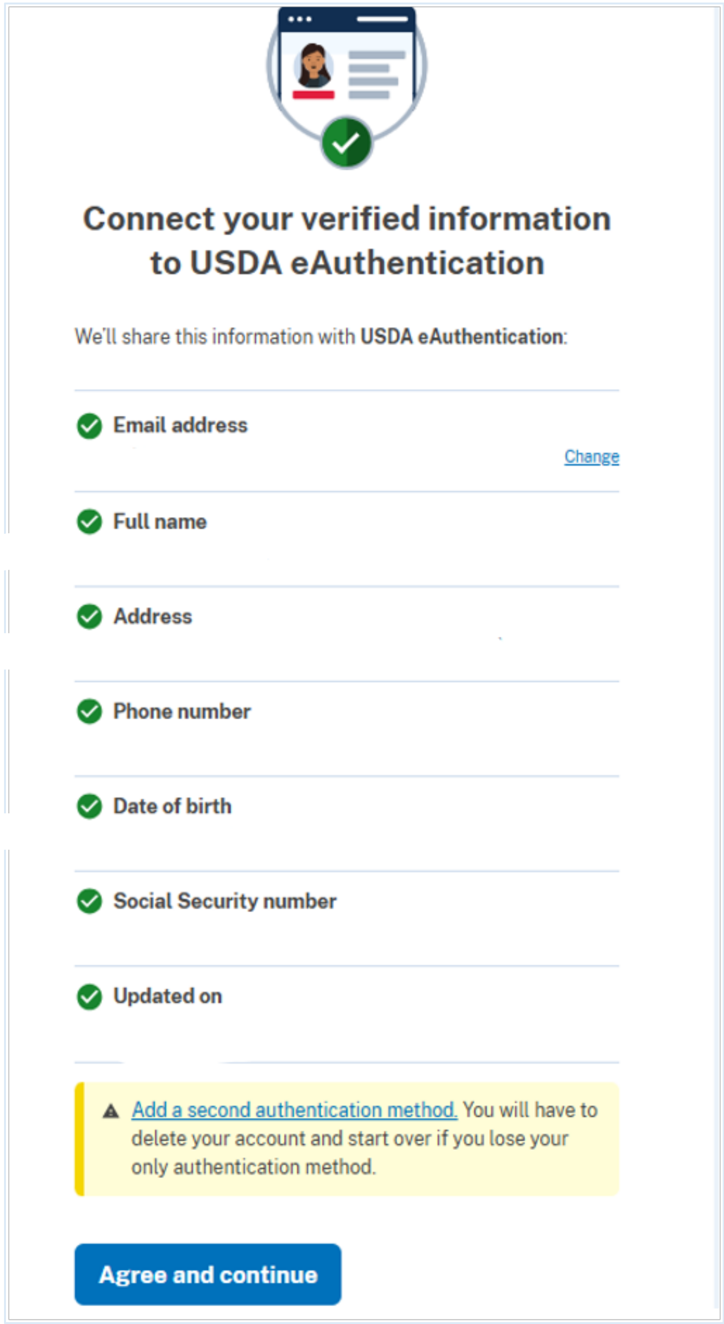
19. The system will give you a personal key. Please **WRITE** down this key and the date generated. Keep it with your passwords. It is suggested to also take a picture. SAVE in a safe place. Check the box you have saved the personal key and then on 'Continue'.



This personal key is the only way to reset your password.

NASS/NASDA can NOT help you if you do not SAVE this key!!!!!!

20. Verify all information below is correct. Click on Agree and Continue.



21. After you click on 'Agree and Continue' the screen will spin as it authenticates you for the READI system. This takes 1-2 minutes. In some cases, it spins for about 10 minutes and then connects. In rare circumstances, if an update is running, it might continue to spin indefinitely. Please let your manager know if this occurs.

22. **Please wait for training on READI before clicking or accessing any options in the system.**

23. Log out of the system by closing the window.

Chapter 2: READI Overview

A. General Information

Equipment:

- All NASDA users will access the system using a Mac Book or iPad.

Browser Information:

- Users can access READI on either Chrome or Edge, but Chrome is the recommended browser.
- two URLs below in their browser for quick access. Bookmarks have been created in the Edge and Chrome browsers for the two URL's below and named 'Beta site' and 'Production site' .
- It's recommended to clear cache periodically or if you've encountered issues in READI. (Do not do this with a survey open or you could potentially lose data). Do this by clicking (Cntrl-shift-del) or clicking on the three dots at the top right and selecting 'Delete Browsing Data'.
- Users should never have multiple tabs of READI open simultaneously.

URLs:

- READIDCBETA.NASS.USDA.GOV is the beta site and is used for training and practice. It has a reddish banner at the top and masks certain respondents' PII (personal identifying information).

- READI.NASS.USDA.GOV is the production site and is a LIVE SITE. It has a green banner at the top and full visibility of respondents' PII and survey data.

Roles:

- The READI system currently has two levels of access: Standard Rights for Enumerators and Elevated Rights for managers, coaches, and trainers. Depending on one's designation, they may see more (or fewer) items on their screen than are shown in the screenshots in this manual.

Skills:

In addition to different roles, different options are available to enumerators depending on the skills they possess in iSolved. Examples of this include the ability to take Incoming Telephone Calls (ITC) or to conduct multi-lingual interviews.

There are currently seven different skills stored in iSolved that interact with the READI system. Depending on which skills an enumerator possesses, different screens and options are available. **See Chapter 5 for details on skill.**

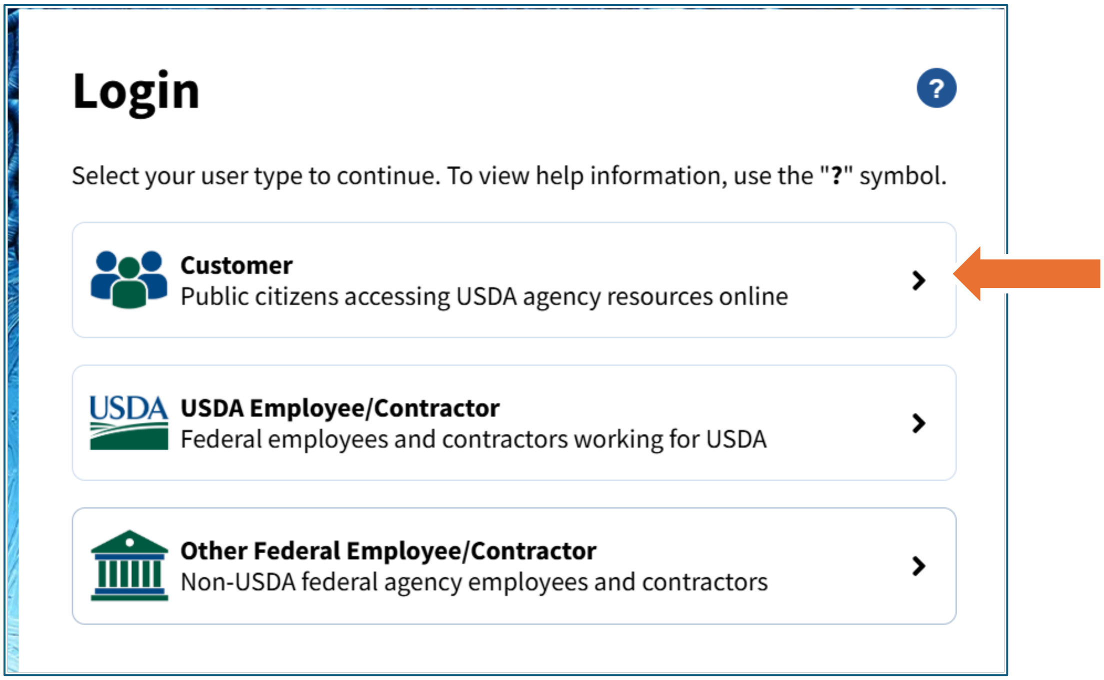
Skill
Addressing list frame required questions
Conducting complex surveys
Disconnect Lookup
Handling multiple operations
ITC
Managing coordinated records
Refusal conversion techniques

B. Logging Into READI

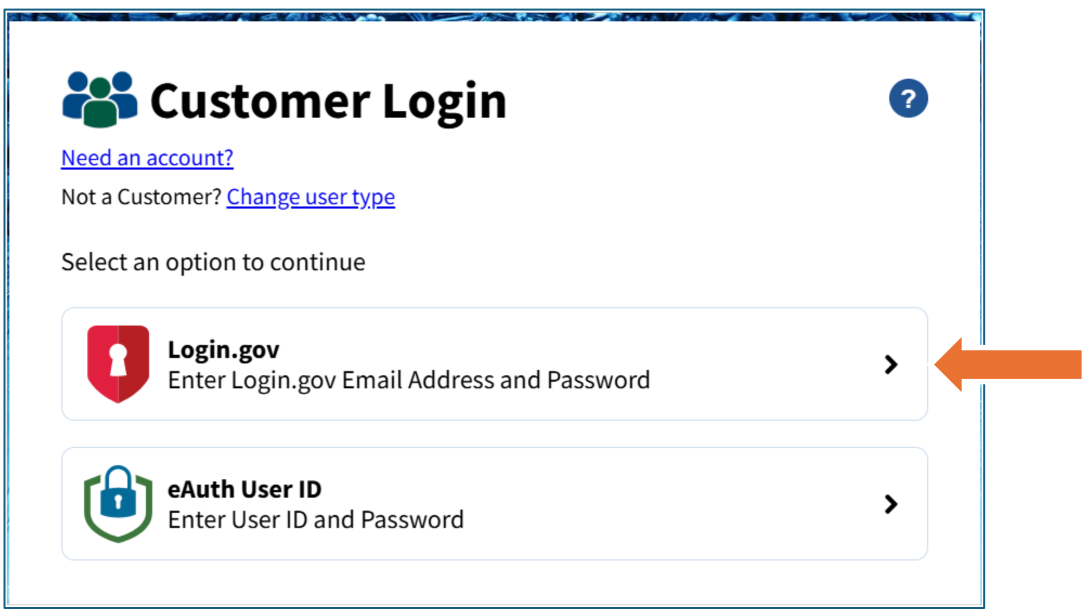
The steps to login to READI are identical for READI Beta and READI Production. Be aware of which site you are in. Always conduct practice and training in Beta.

Click on the Beta Site bookmark or enter READIDCBETA.NASS.USDA.GOV in your browser. The following screen will appear. (The system will not require this first screen once a user has logged in at least once. It will however show again if the user clears their cache.)

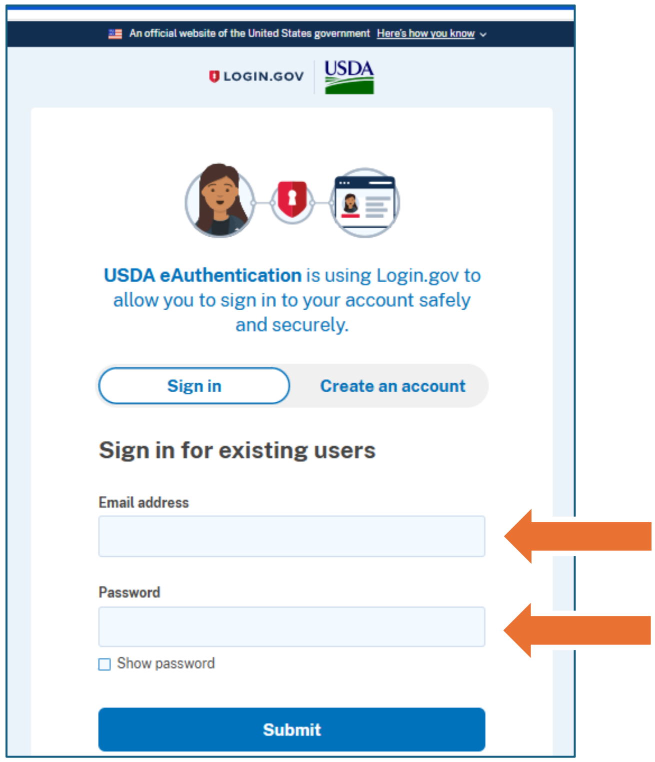
Click ‘Customer'



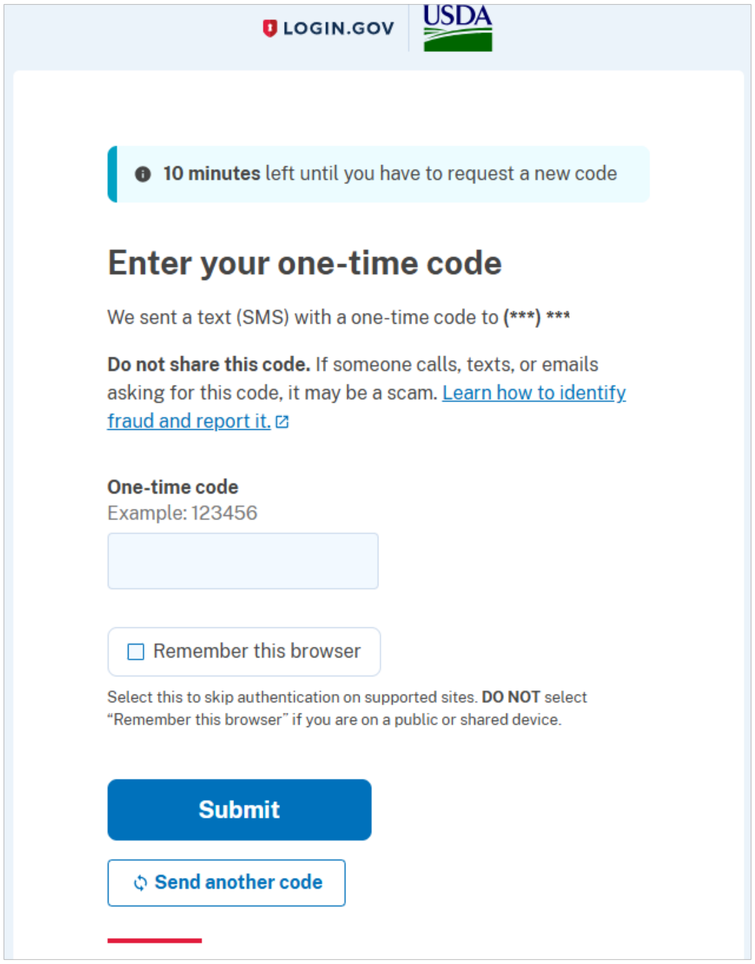
Select Login.gov



Enter your NASDA email and password established in Chapter 1 – Getting started and click ‘Submit’.



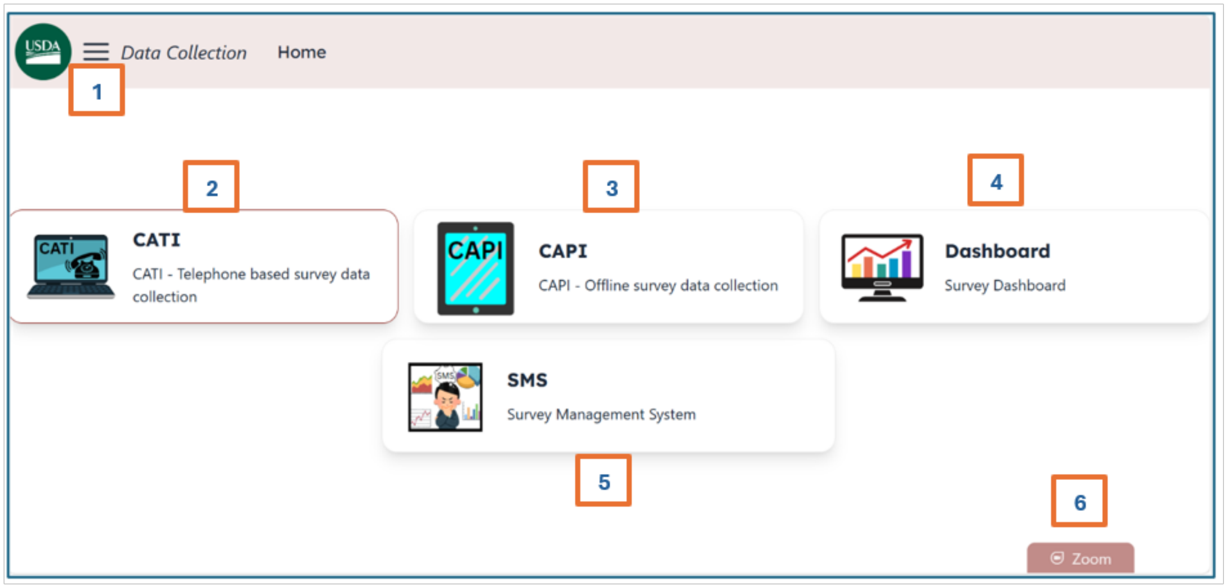
Enter the 6- digit code sent to your phone:



The system has security measures in place where after 25 minutes of inactivity, the system will display a message alerting the enumerator of their inactivity and the record will be pulled back. If no activity occurs and the system logs the user out, close the browser tab and repeat the steps above to log back in.

C. READI Home Page

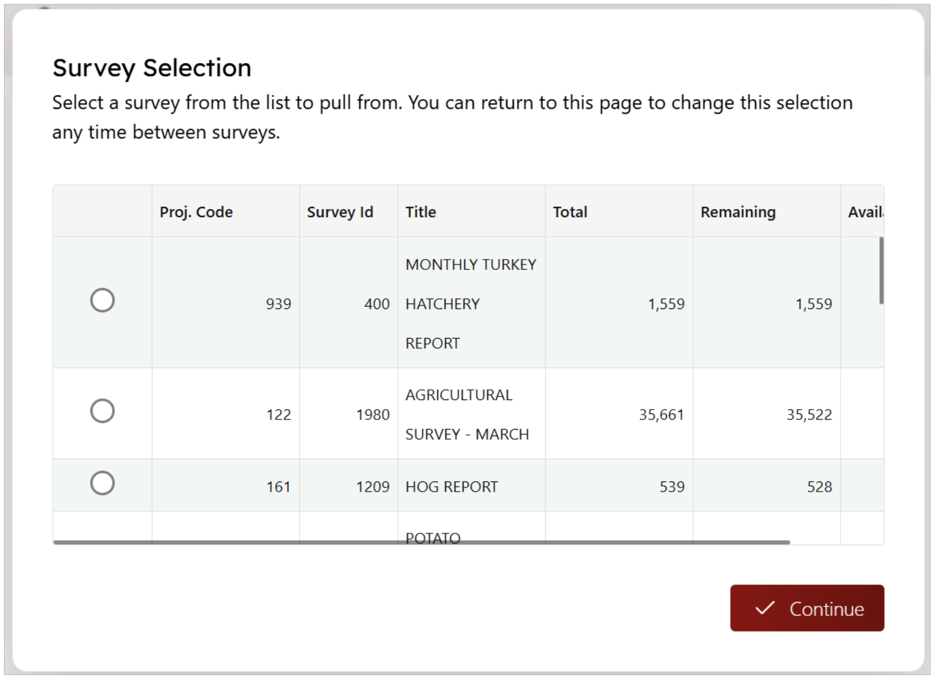
The first screen that appears after login is the READI Home Page. Icons and menu choices are explained below.



1) Side bar menu (click to show/hide)
2) CATI – use for phone enumeration
3) CAPI- use for field enumeration
4) Dashboard - this only displays for NASDA Management staff
5) SMS is currently available to Associate Directors only. In the future a SMS lite will be available for Managers, Coaches, and Trainers.
6) Zoom button (click to expand/collapse)

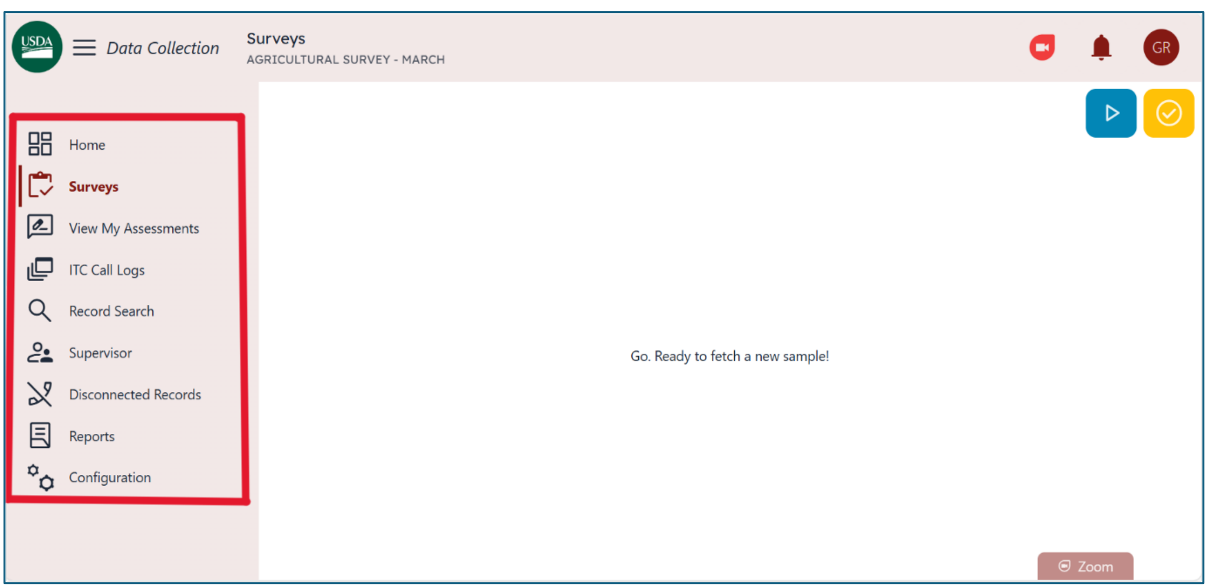
D. Survey Selection Page

After clicking 'CATI' on the READI home page, the Survey Selection page displays all surveys open for data collection along with sample details for each survey. Scroll down to see additional surveys. Click on the radio button to the far left of the desired survey and select 'Continue' to open a survey. (Managers will instruct enumerators on which survey(s) and in what priority they should call.)



E. Side Bar Menu

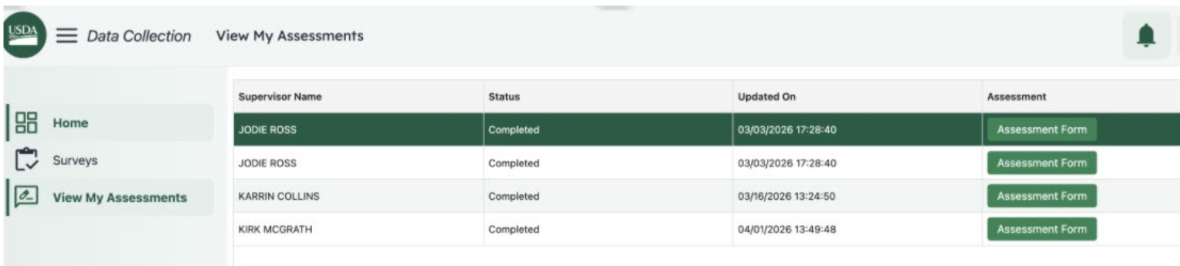
The side bar menu is available on most screens. Users can show it when needed or hide it to allow for a larger viewing area. The items viewable in the menu depend on the access level granted by the system. Most enumerators will see Home, Surveys, and View My Assessments. The features of the side bar menu are shown and described below:



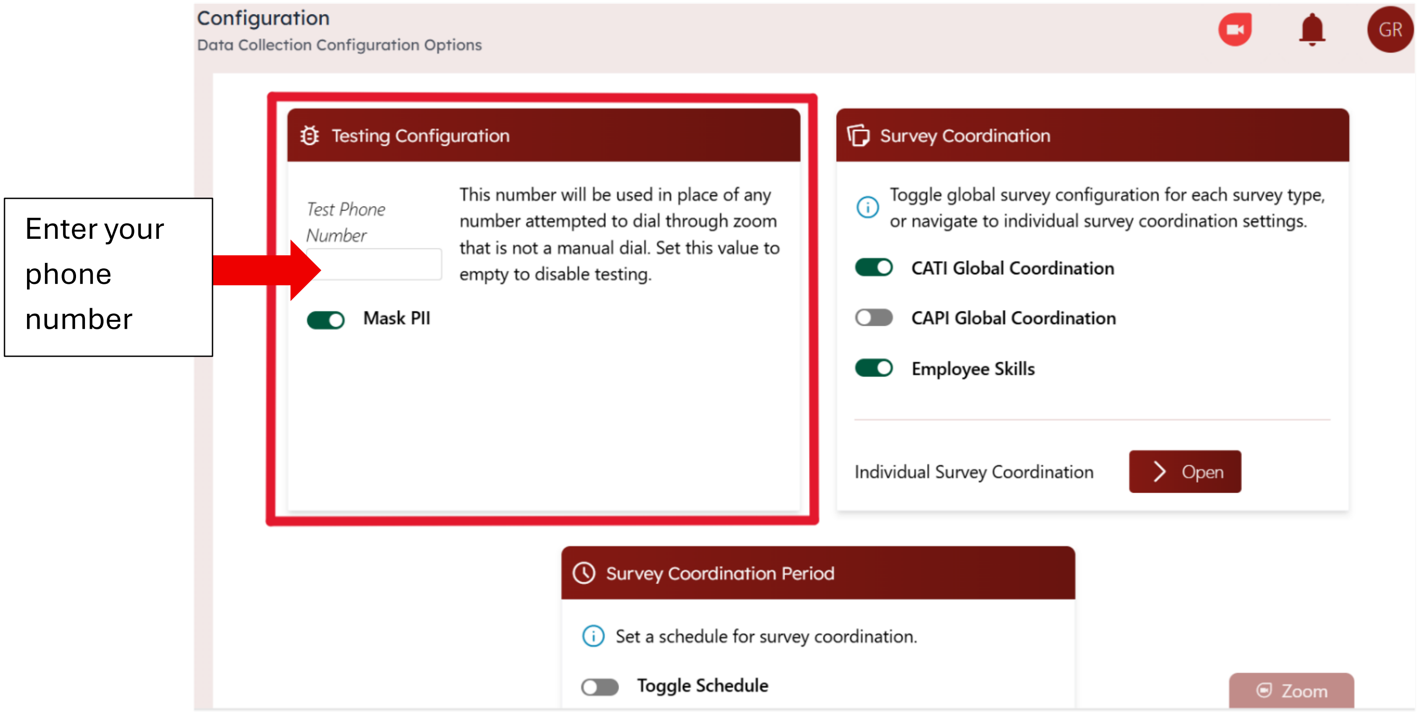
1) <u>Home</u> – clicking Home in the side menu brings up two options:
   a. <u>Go to My Surveys-</u> returns users to the previously selected survey.

b. Knowledgebase Links- connects to the NASDA website's reference materials.

2) Surveys- returns the user to the last selected survey.
3) View My Assessments- allows enumerators to see their personal assessments done by their manager, coach or trainer (they can listen to a recording of the interview being assessed). Click on 'Assessment Form' to view details of the assessment and feedback.

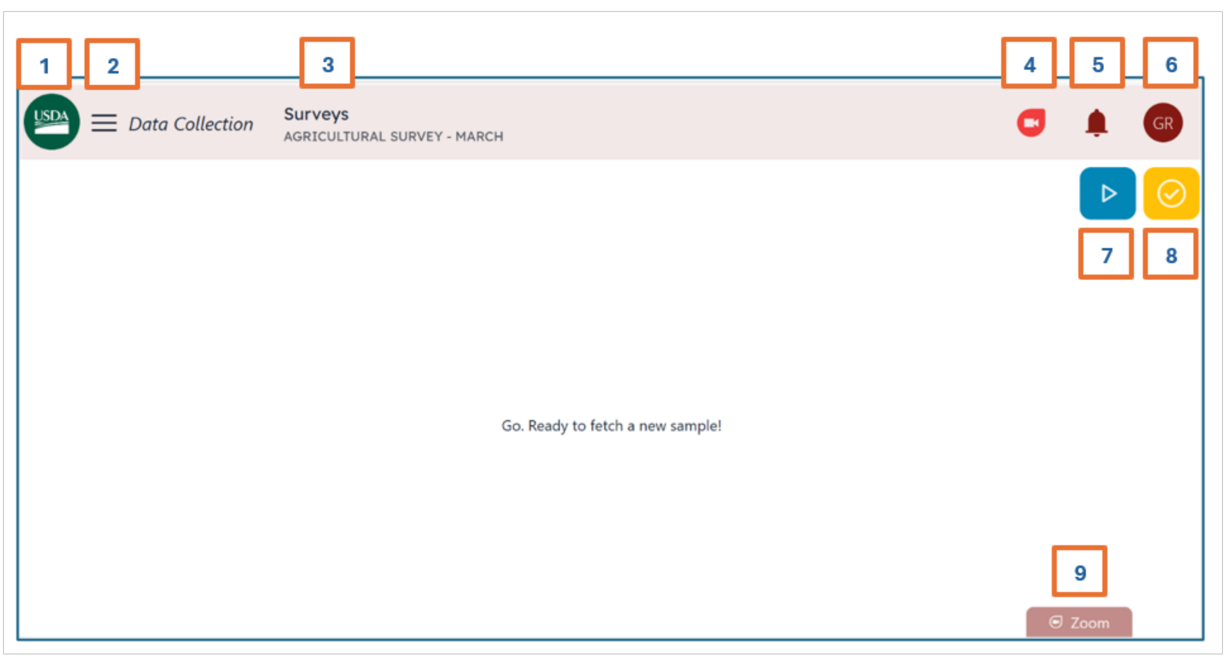


4) ITC Call Logs- available to those with Incoming Telephone Calls (ITC) skills completed in their iSolved account. This allows enumerators to take incoming telephone calls and respond to messages left by respondents. See Chapter 5 for more information on ITC calling.
5) Record Search- allows managers, coaches, and trainers to search for a specific record by name, address, phone, survey code or state-poid. See Chapter 9 for more information on record search.
6) Supervisor- area for managers to view enumerator's status etc.
7) Disconnected Records- available to enumerators that have this skill marked in their iSolved account. It allows users to see information for disconnected records and their associated research forms. See Chapter 5 for more information on disconnected records.
8) Reports- provides a list of reports regarding survey metrics. This area is still under development and available only to managers, trainers, and coaches.
9) Configuration – there are three sections in Configuration; Testing Configurations, Survey Coordination, and Survey Coordination Period. Enumerators will use Testing Configuration to enter their phone number for practice interviews. The Zoom dialer will call that number in place of the masked '999-999-9999' number shown on the screen. This will need to be done each time a user logs into READI Beta after they have cleared cache.



F. Survey Home Page

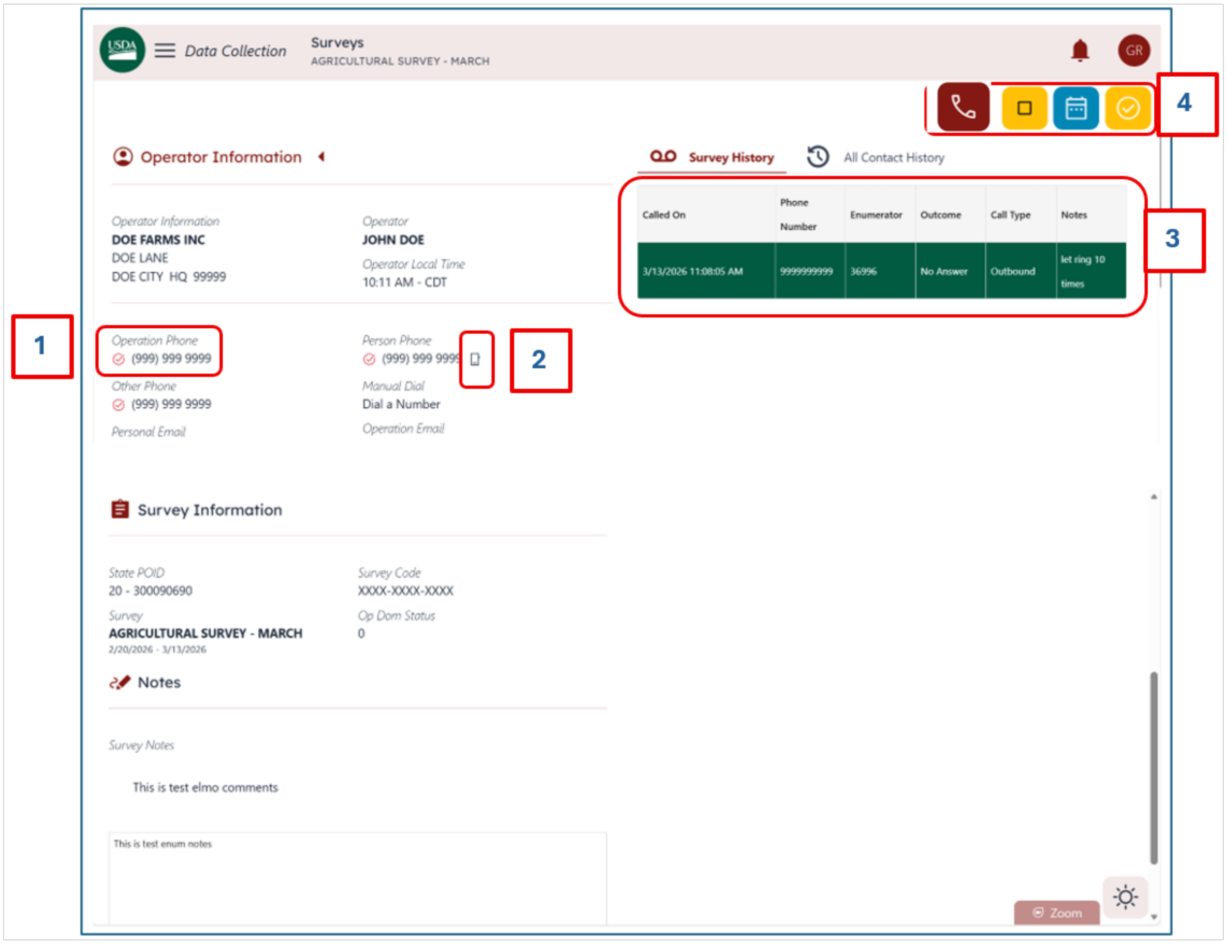
Once the desired survey is selected, the following screen displays:



1) USDA Logo- will return you to the READI home page.
2) Menu icon- shows/hides the side bar menu.
3) Selected survey title displays.
4) Toggle Zoom Status button determines an enumerator's ability to accept incoming telephone calls (ITC).
5) Notifications will indicate the enumerator has an assessment posted to view or something new has been posted on the bulletin board.
6) My Account - used to logout of READI.
7) Pull Next Sample – delivers the next available record to call.
   a. The ability to manually retrieve a specific record is currently restricted to managers, coaches, and trainers.
   b. Records are delivered no more than three times a day and at least four hours in between attempts.
8) Select Survey button brings up the Survey Selection screen and allows users to change surveys.
9) Zoom button (click to expand/collapse)

G. The Dial Screen

The dial screen is the first screen that displays when an enumerator clicks 'Pull Next Sample'. It contains information on the Operator, Operation, and Partners (if any). Scrolling down will also show survey information and notes.



1) Red check marks appear next to phone numbers that were attempted.
2) A phone icon next to the phone number indicates it is a cell phone.
3) As call attempts are made, the outcomes are logged in the Survey History area (green shaded area). All contact history for other surveys can also be viewed by clicking on ‘All Contact History’.
4) There are several icons at the top right that will change depending on whether a call and interview are active:

Make next call – Calls the next available phone number for the record. This icon shows before dialing or once a sample is completed. When a call is active, the icon does not display. When using this icon to call a record, the system will first try the Person phone, followed by the Other phone, and then the Operation phone. It will then move on to the same sequence for any partner numbers that exist.

Open Survey – opens the actual survey instrument to begin collecting data. This icon shows once a call is active.

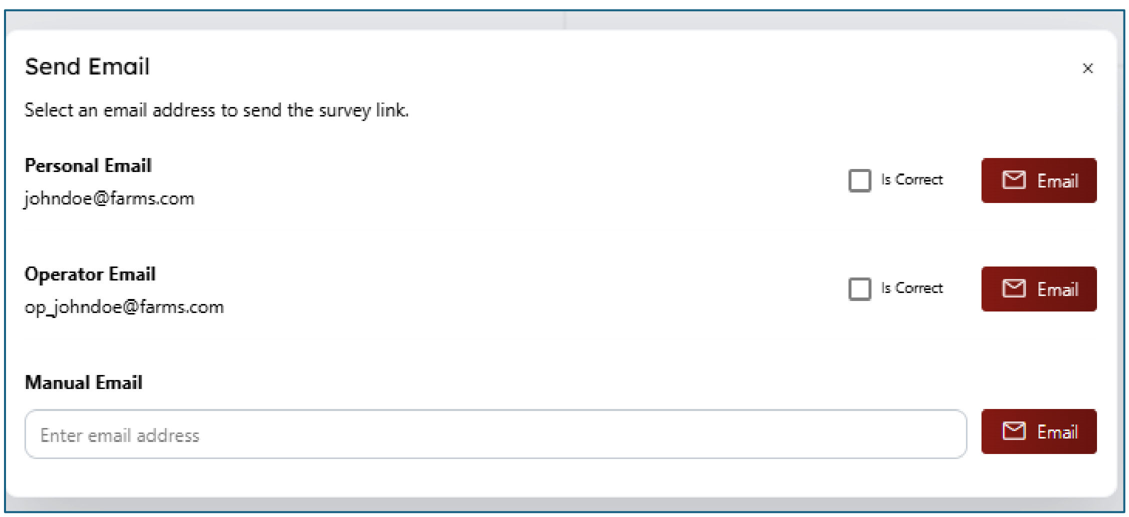
Complete Sample -use to close a survey after dial attempt or survey completion.

Schedule Appt – brings up the appointment scheduling screen.

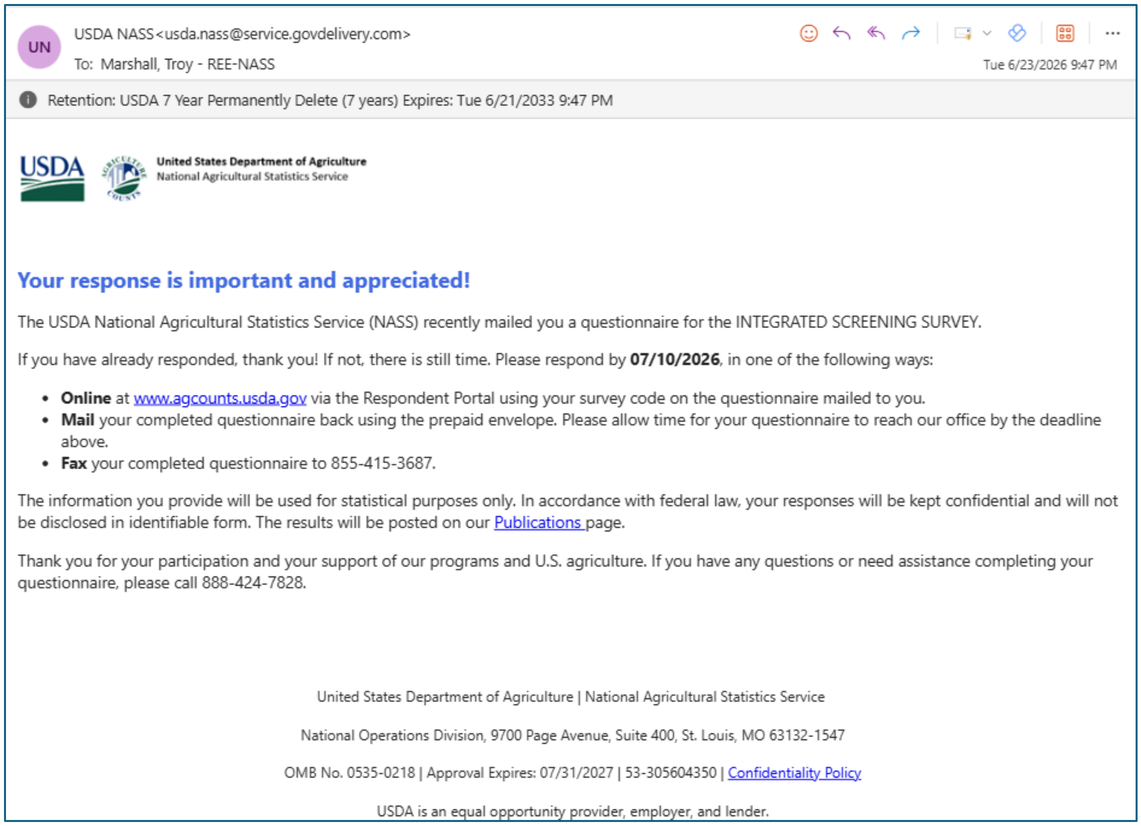
Select Survey - The Survey Selection list showing available surveys will automatically pop up when you first go into CATI. Once in a survey, this yellow icon is used to select a different survey.

Weather - shows the weather specific to the operator's location.

Send Email - For respondents that want to complete the survey via EDR, a direct link can be sent to their email to complete the survey. Click the envelope icon to display a secondary menu. Choose the desired email address, verify its correct (or enter one manually), and click the email button.



The respondent will receive the following email with a link to the Agcounts Respondent Portal site to self-report.



USDA NASS <usda.nass@service.govdelivery.com>

To: Marshall, Troy - REE-NASS

Tue 6/23/2026 9:47 PM

Retention: USDA 7 Year Permanently Delete (7 years) Expires: Tue 6/21/2033 9:47 PM

United States Department of Agriculture
National Agricultural Statistics Service

Your response is important and appreciated!

The USDA National Agricultural Statistics Service (NASS) recently mailed you a questionnaire for the INTEGRATED SCREENING SURVEY.

If you have already responded, thank you! If not, there is still time. Please respond by **07/10/2026**, in one of the following ways:

- **Online** at www.agcounts.usda.gov via the Respondent Portal using your survey code on the questionnaire mailed to you.
- **Mail** your completed questionnaire back using the prepaid envelope. Please allow time for your questionnaire to reach our office by the deadline above.
- **Fax** your completed questionnaire to 855-415-3687.

The information you provide will be used for statistical purposes only. In accordance with federal law, your responses will be kept confidential and will not be disclosed in identifiable form. The results will be posted on our Publications page.

Thank you for your participation and your support of our programs and U.S. agriculture. If you have any questions or need assistance completing your questionnaire, please call 888-424-7828.

United States Department of Agriculture | National Agricultural Statistics Service

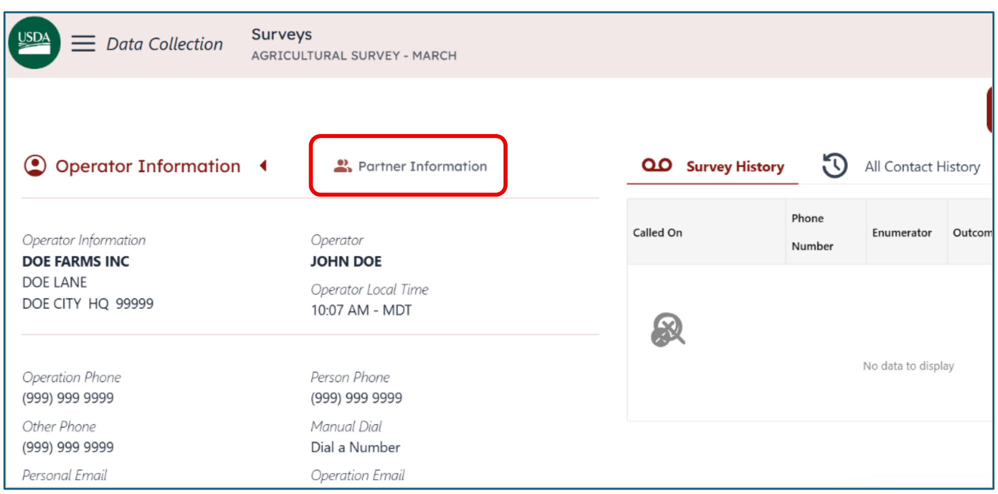
National Operations Division, 9700 Page Avenue, Suite 400, St. Louis, MO 63132-1547

OMB No. 0535-0218 | Approval Expires: 07/31/2027 | 53-305604350 | Confidentiality Policy

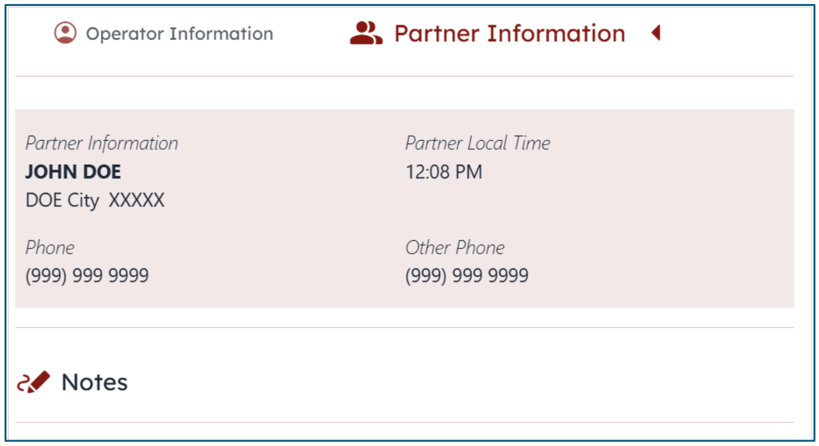
USDA is an equal opportunity provider, employer, and lender.

H. Partners

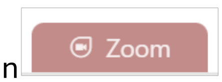
If an operator has existing partners, the partner icon will show to the right of Operator Information on the dial screen.



Clicking on 'Partner Information' will display the partners' information and phone numbers.

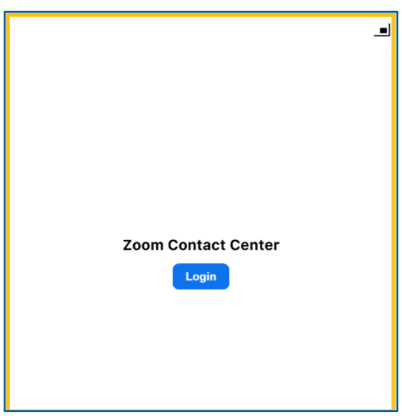


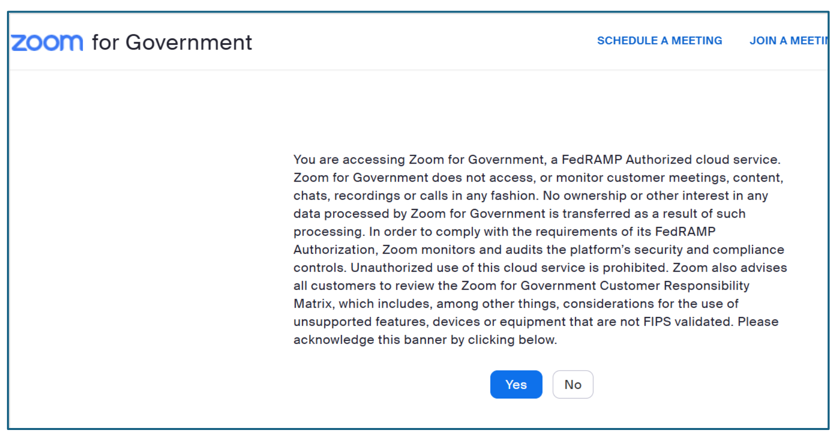
I. Zoom Contact Center

The Zoom Contact Center defaults to minimized. Users can click on the Zoom button 

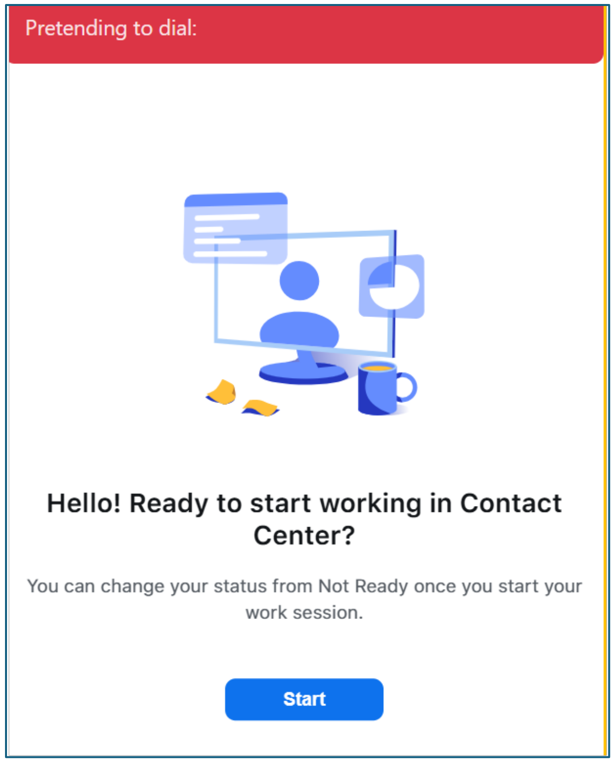
to show the Zoom contact center. Click the small box at the top right  to minimize.

If a user's cache has been cleared recently, they may encounter one of the login screens below when they first try to make a call. Simply click 'Login' and 'Yes' to proceed.

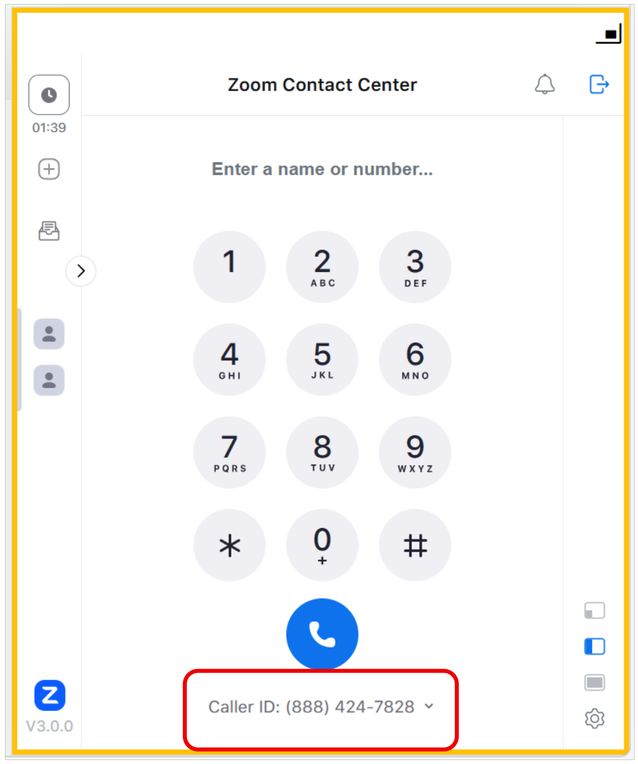




OR, if this second image appears, click 'Start'.



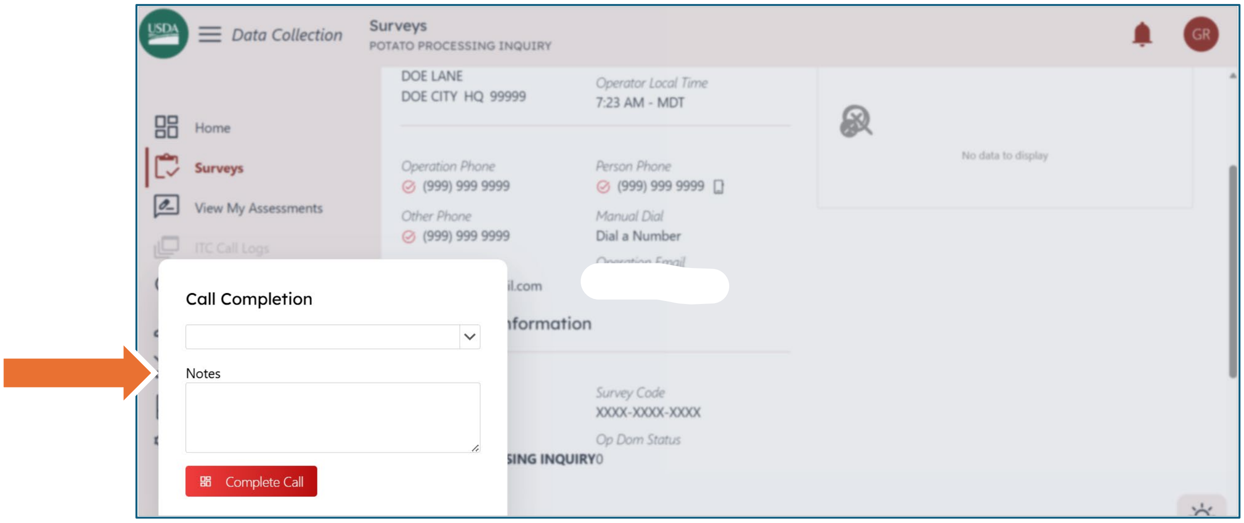
- Once a sample is pulled and the user is logged in, the Zoom contact center will display as shown below. **Enumerators do not need to use any of the icons shown in the Zoom Contact Center.**



- Caller id at the bottom will show an area code (434) Virginia number in beta and the ITC (888) number in production.
- The border of the Zoom contact center will change color from yellow to green when a call is connected.

J. Call Completion Screen and Definitions

When a Zoom call ends, regardless of whether the survey was completed or not, the user is prompted to enter the call completion result and add any notes that would help with future contacts. Below are detailed explanations of the call result choices, how to use each, and how the system treats the record.



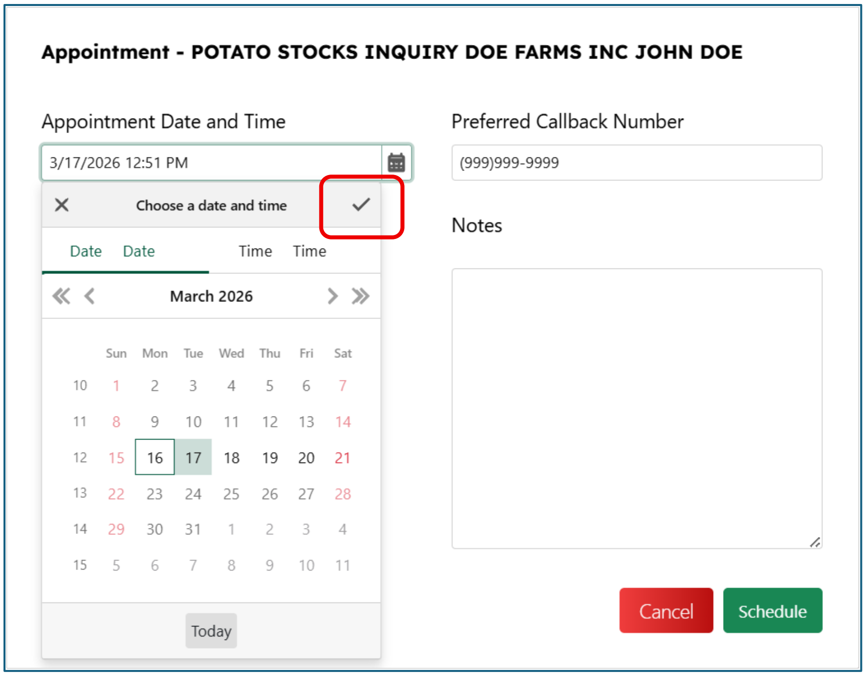
Call Completion	When to use	Enumerator Action	System Action
No Answer	If no one picks up	Do NOT submit a questionnaire. Code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).
Voicemail	If you receive a voicemail	Do NOT submit a questionnaire. Leave the standard message (see Chapter 8) and code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).
Hung Up	If respondent hangs up	Do NOT submit a questionnaire. Code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).
Made Contact	If the respondent answers, but doesn't have time right now to complete the survey and doesn't want to make an appt.	Do NOT submit a questionnaire. Code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).
Call Rejected	This is a verbal message received due to an issue with the phone carrier.	Do NOT submit a questionnaire. Code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).

Busy	If call rings busy	Do NOT submit a questionnaire. Code the call completion box	System waits at least 4 hours to deliver again (no more than 3 times a day).
Will EDR	If respondent wants to finish it on the web	Do NOT submit a questionnaire. Code the call completion box	System puts the record on hold until near end of survey and only if not yet checked in.
Will Mail	If respondent wants to mail it in (or has already mailed it in)	Do NOT submit a questionnaire. Code the call completion box	System puts the record on hold until near end of survey and only if not yet checked in.
Wrong Number	If the number dialed is not the respondents	Do NOT submit a questionnaire. Code the call completion box	If all numbers are wrong or disconnected, the record is removed from the calling pool and sent for disconnect research. If a new number is found it is returned to the calling pool.
Disconnected	Number dialed is disconnected	Do NOT submit a questionnaire. Code the call completion box	If all numbers are wrong or disconnected, the record is removed from the calling pool and sent for disconnect research. If a new number is found it is returned to the calling pool.
Language Barrier	The person answering speaks a different language	Do NOT submit a questionnaire. Code the call completion box	The number is removed from the calling pool and redirected based on language skills
Refusal	Respondent refuses to complete the questionnaire.	Open the survey, click the comment icon and select ‘Refusal’, code the respondent and submit the survey.	The record is complete and removed from the calling pool.
Inaccessible	The respondent is unavailable during the ENTIRE survey period	DO NOT complete the inaccessible	The record is removed from the calling pool.

	(traveling, sick etc.) There should be a limited number of these cases.	choice within the questionnaire itself and DO NOT submit the questionnaire. Only mark the call completion box.	
Appointment	Respondent is willing to complete the survey at another time.	DO NOT submit the questionnaire. Use the appointment icon on the READI screen to schedule.	The record is removed from the calling pool and delivered again 10 min. prior to and 5 min. after the appointment time to the original enumerator if available, otherwise to another enumerator
Collected	Respondent completed the survey with the enumerator	Complete and submit the survey.	The record is removed from the calling pool.

K. Making an Appointment

Appointments can be made at any time using the Appointment icon. 
The appointment screen displays.

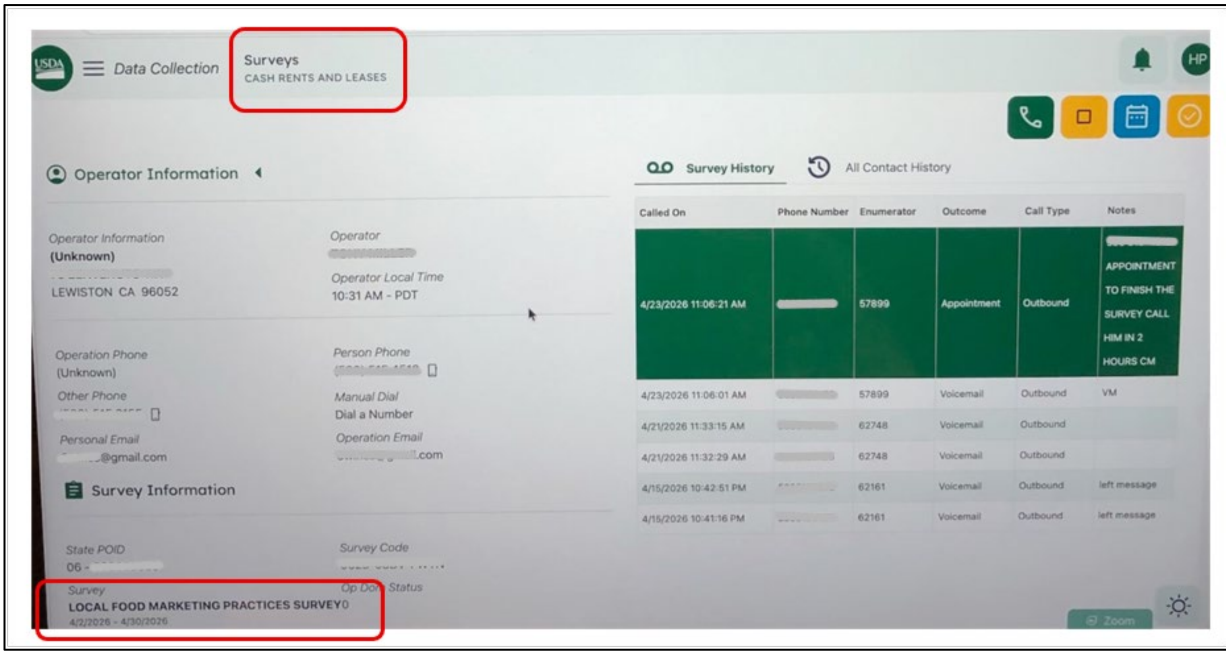


1. Enter a date and time. **Users must click the check mark**  **after selecting the date and time to save.** (Dates outside the survey data collection window are greyed out.)
2. Appointments will reflect the time zone of the operator (based on their zip code).
3. The preferred call back number defaults to the number currently connected with but can be overridden if needed.
4. Add any notes that would be helpful for this survey. Notes made here will show in the call history log.
5. Click schedule.
6. The call completion box will auto fill the selection to ‘Appointment’.

   If an enumerator clicks ‘Appointment’ in the Call Completion screen and clicks ‘Complete Call’ without having first set an appointment, the system will bring up the appointment calendar at that point to allow scheduling.

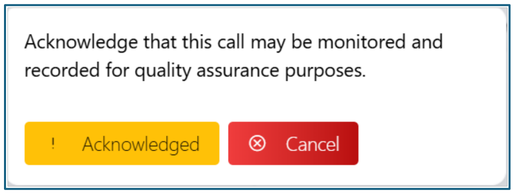
   The system will attempt first to deliver the record back to the enumerator that scheduled the appointment ten minutes prior to the appointment time and up to five minutes after. If that enumerator is on another call or not working, the system will deliver the record to another enumerator.

Note: When the system delivers a scheduled appointment to an enumerator, it's important to note what survey the appointment is referencing as it might be a different survey than currently selected. See the example below where the enumerator has the Cash Rents survey selected but the system delivers a Local Foods appointment for them to call:



Chapter 3: The Survey Instrument

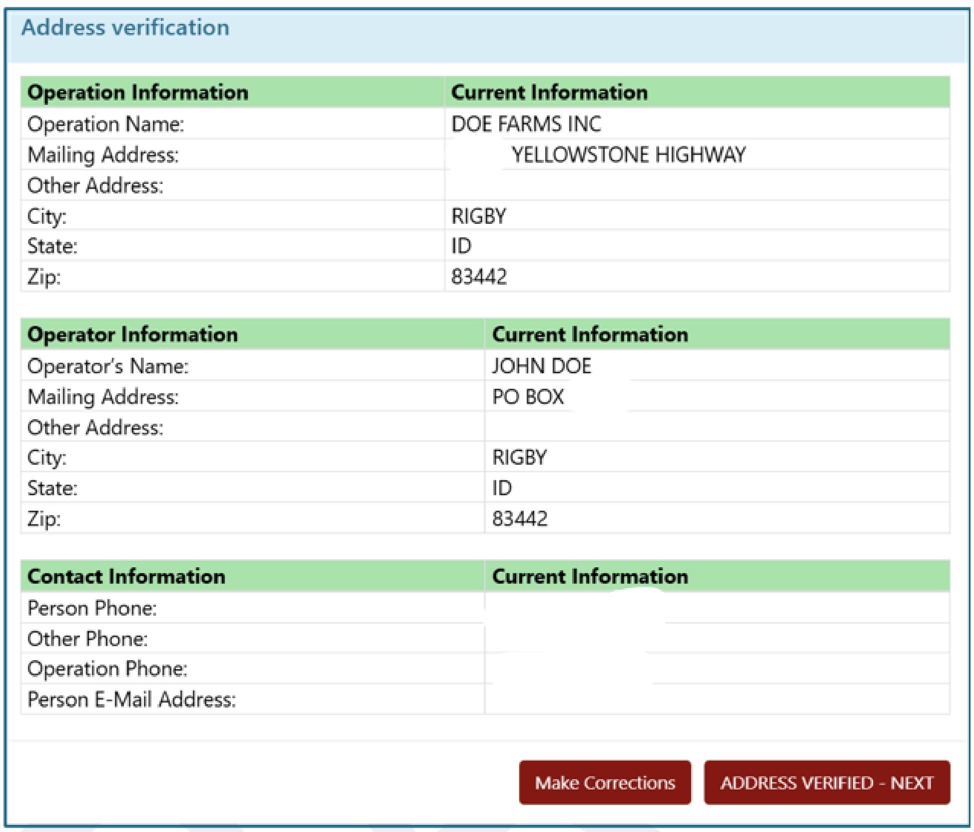
When a respondent is willing to complete the survey, click the 'Open Survey' icon  to begin the survey. Alert the respondent that the call is monitored and recorded:



A. Address Verification Pages

The first screen that appears is the address verification page.

1. If all information is correct, click 'Address Verified – Next'.
2. If any information is NOT correct, click 'Make Corrections'.



Address verification

Operation Information	Current Information
Operation Name:	DOE FARMS INC
Mailing Address:	YELLOWSTONE HIGHWAY
Other Address:	
City:	RIGBY
State:	ID
Zip:	83442

Operator Information	Current Information
Operator's Name:	JOHN DOE
Mailing Address:	PO BOX
Other Address:	
City:	RIGBY
State:	ID
Zip:	83442

Contact Information	Current Information
Person Phone:	
Other Phone:	
Operation Phone:	
Person E-Mail Address:	

Make Corrections | ADDRESS VERIFIED - NEXT

3. The following screen will appear to allow corrections. Enter updates in the far-right column.

The trash can icon is used to delete information from a cell.

4. Click ‘Address Verified and Saved – Next’ once complete.

Address verification

Operation Information	Current Information	Update if necessary
Operation Name:	DOE FARMS INC	DOE FARMS INC
Mailing Address:	YELLOWSTONE HIGHWAY	YELLOWSTONE HIG
Other Address:		
City:	RIGBY	RIGBY
State:	ID	ID
Zip:	83442	83442

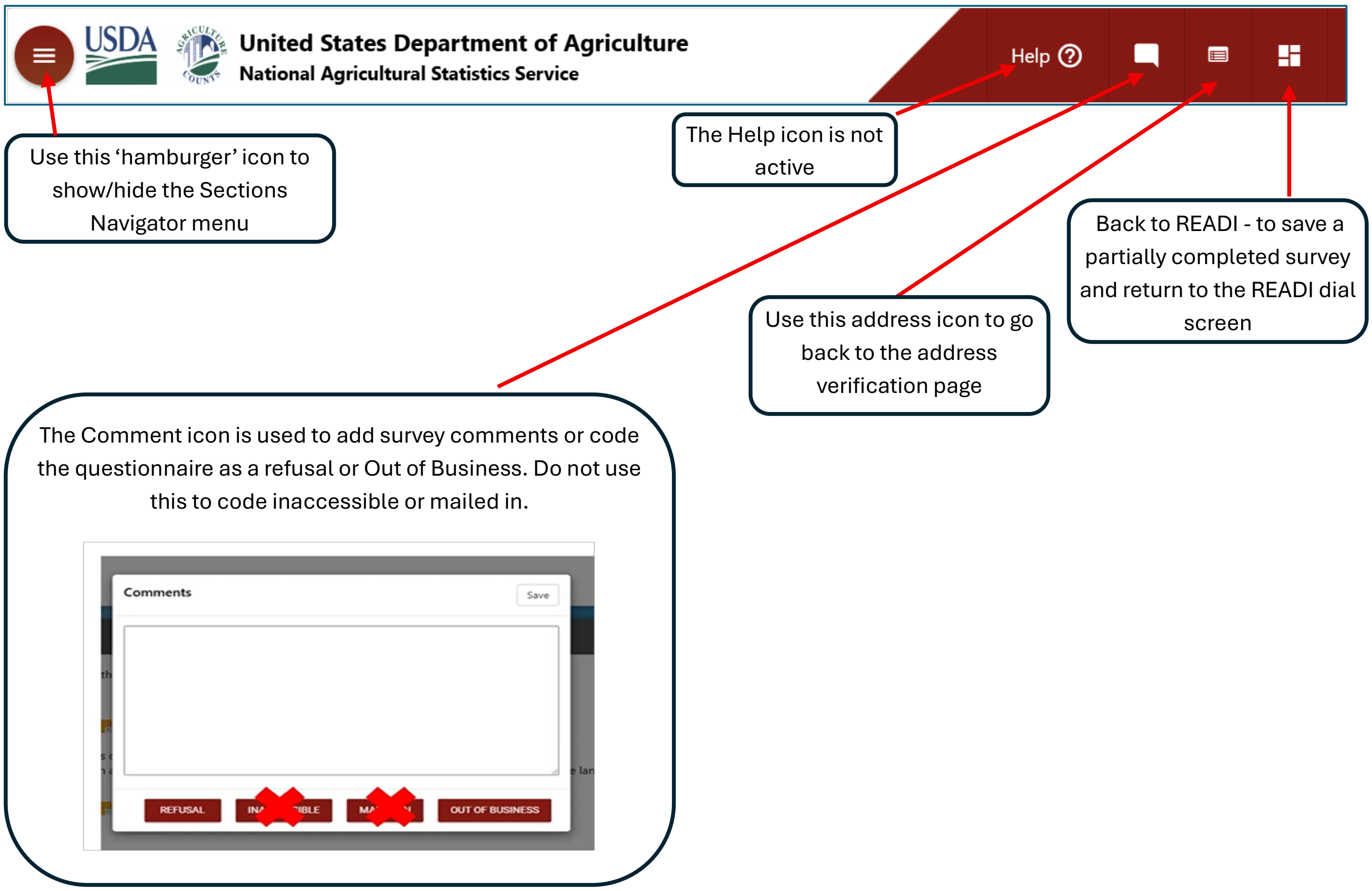
Operator Information	Current Information	Update if necessary
Operator's Name:	JOHN DOE	JOHN DOE
Mailing Address:	PO BOX	PO BOX
Other Address:		
City:	RIGBY	RIGBY
State:	ID	ID
Zip:	83442	83442

Contact Information	Current Information	Update if necessary
Person Phone:		☐ Mobile
Other Phone:		☐ Mobile
Operation Phone:		☐ Mobile
Person E-Mail Address:		

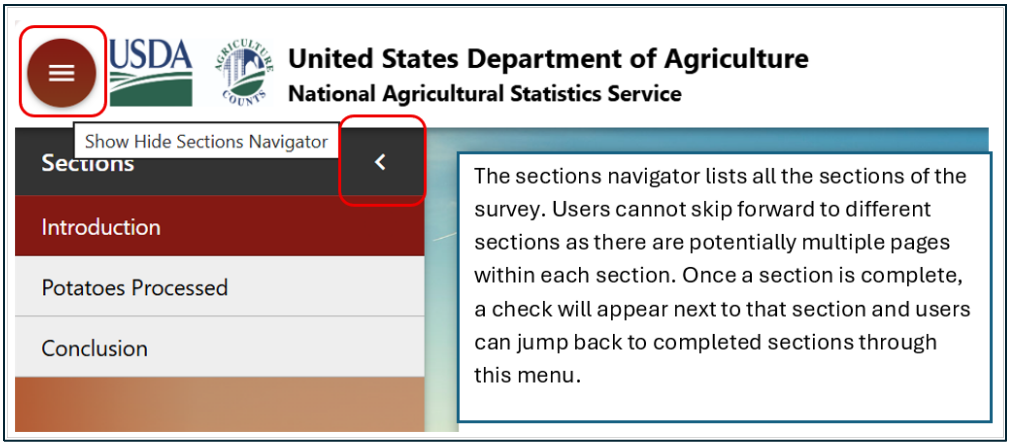
ADDRESS VERIFIED AND SAVED - NEXT

B. Menus and Survey Navigation

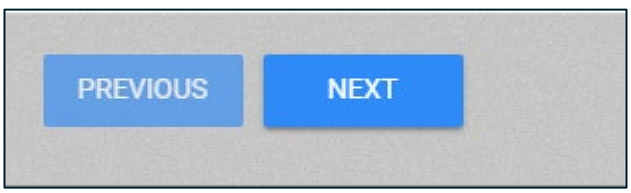
Once inside a survey, the Top Menu displays:



The Sections Navigator side bar menu allows users to see the different sections of a survey. It can be shown using the hamburger icon and hidden using either the hamburger icon or the arrow to the right of Sections.

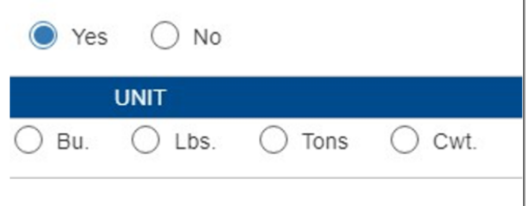
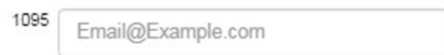
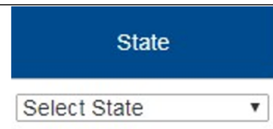


It is important to follow the proper routing through a questionnaire. Questions may appear or disappear based on how the preceding question(s) are answered. At the bottom of every page are a Previous and Next button. These buttons should always be used as the primary means of navigation within a questionnaire as they will always ensure that the appropriate questions are displayed.



C. Survey Questions

There are several different styles of questions that a user may be asked to answer. The different question types available in READI are:

Radio Button: Only one answer is allowed	
Input Cell: Use keyboard or calculator to enter the numeric value	
Text: Use the keyboard to enter the correct information	
Dropdown: Tap on the cell and a menu of possible selections will appear. Select the appropriate choice	

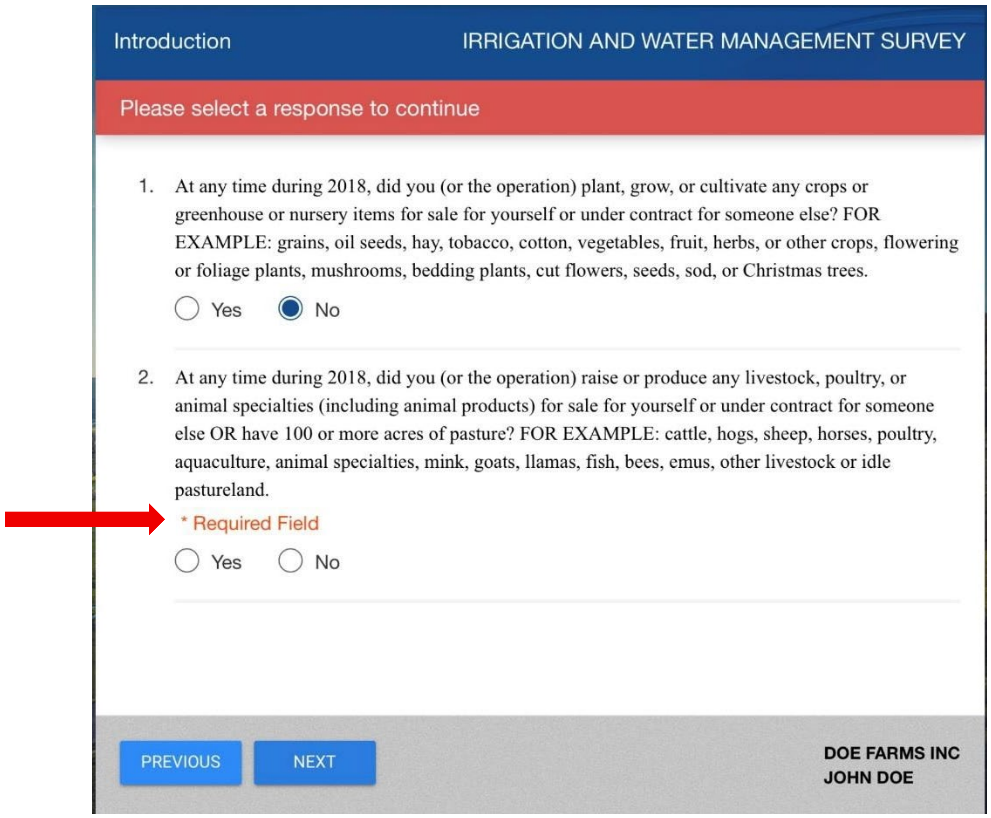
For all numeric input cells there is the option to enter data using the keyboard or the built-in calculator. To use the calculator, tap on the calculator symbol that is located to the right of every input cell.

Prefilled Cells: Within a questionnaire, some questions will be prefilled with information based on previous responses (ex: the number of partners). These cells can always be overwritten if updates are needed.

Skips: The survey instrument also has built in skips based on responses to make collecting data more efficient. For example, if a screener question asks about the presence of livestock and the respondent answers NO, the livestock sections would be skipped so the enumerator would not have to code those cells.

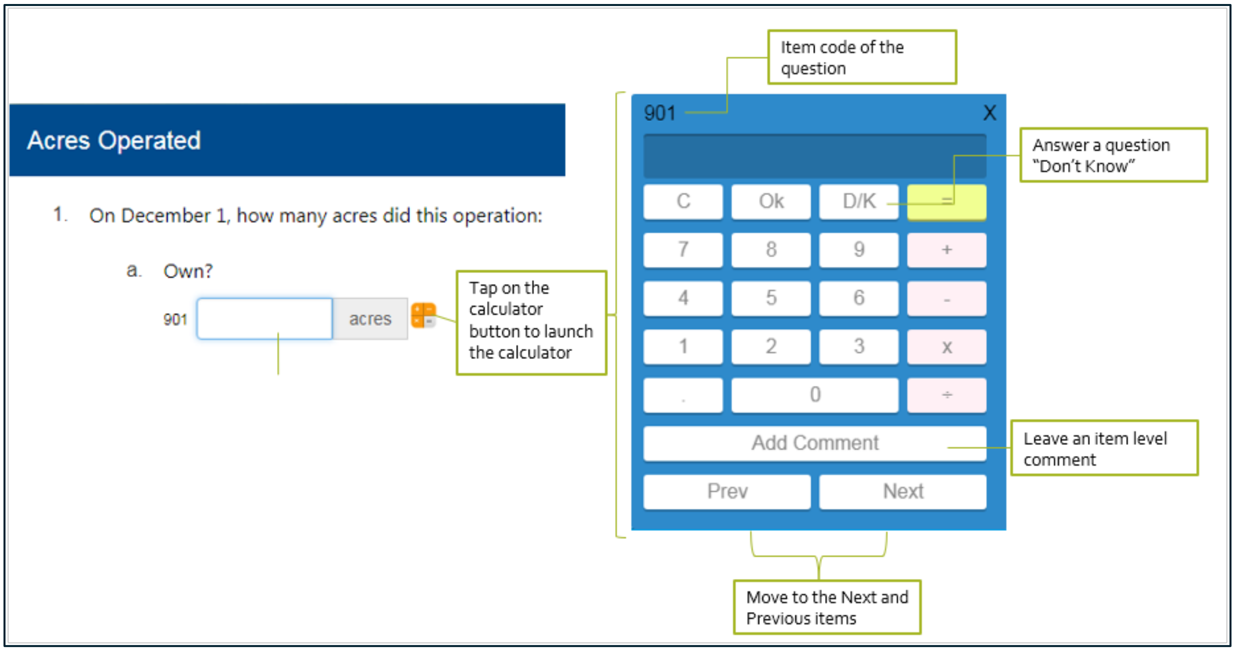
Auto Fill: Certain fields in the survey are automatically calculated and filled in (ex: total acres operated). Like prefilled data, the value in the cell can be overwritten by the user.

Required Questions: In certain surveys, there will be questions that require a response to proceed. If a question is required, but not answered, and user selects Next to proceed, they will see a red banner and an asterisk appear next to the question(s) that need to be answered to proceed. See below.



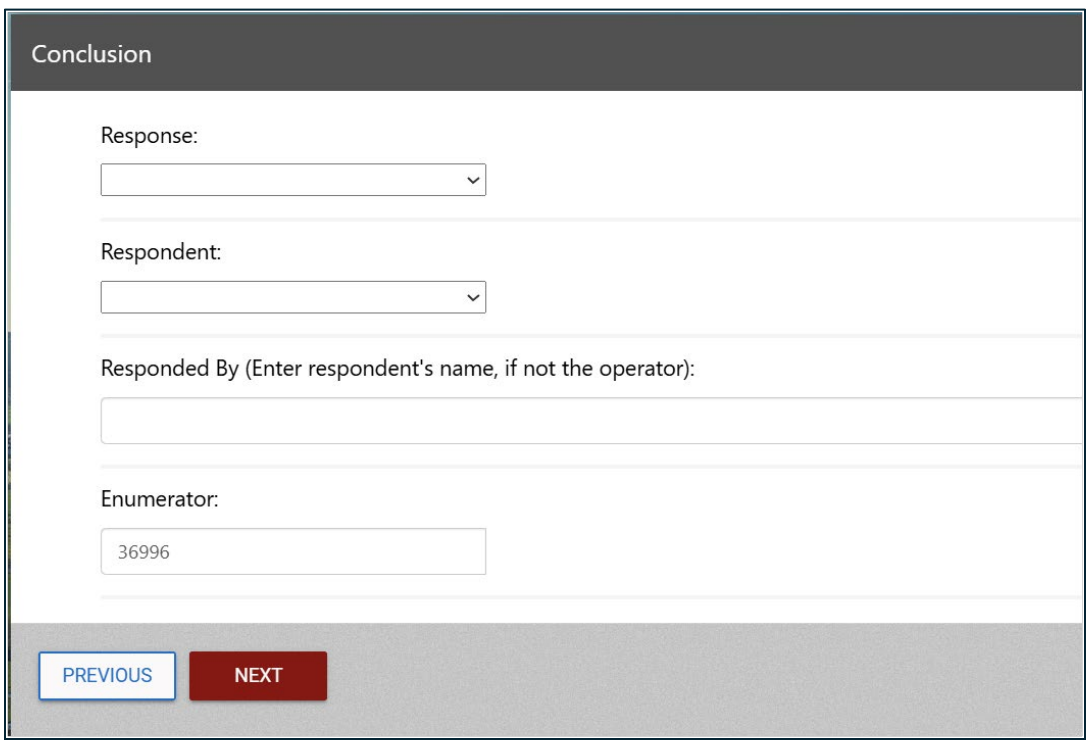
D. The Calculator

The calculator in READI has the same functions as a standard calculator as well as several unique features explained in the diagram below.



E. Conclusion Pages

The enumerator id is automatically filled in but can be overridden if needed.



F. <u>Out of Business/ No Items of Interest</u>

It's important when interviewing respondents to distinguish between a record that does not have the items of interest being surveyed vs. someone who is completely out of business and no longer farming.

<u>No items of interest</u> – the enumerator should open the questionnaire. The screening questions will navigate the user correctly through to the end:

- Complete ALL screening questions within the questionnaire.
- Complete the Change of Operator section at the end of the questionnaire.
- Mark the Response field as 'Complete' on the Conclusion page of the questionnaire.
- Submit the questionnaire.
- On the Dial screen, Mark the Call outcome as 'Submitted'.

<u>Out of Business</u> – if a respondent indicates they are no longer farming:

- Open the questionnaire and click the comment icon at the top right.
- Select Out of Business.
- The Out of Business Screener below displays. (Some questions may not show depending on answers.)
- Complete the required questions and click 'Save'.
- Mark the Response field as 'Complete' on the Conclusion page of the questionnaire.
- Submit the questionnaire.
- On the Dial screen, Mark the Call outcome as 'Submitted'.

Out of Business

Close

1. Which of the following answers best describes why the operation is not in business?

- (•) Operator deceased
- ( ) Operator retired
- ( ) Operation went out of business or was sold
- ( ) Operation was on leased land; operator gave up lease
- ( ) Operator is a landlord (rents farms out to someone)
- ( ) Operator moved out of state
- ( ) Operation was never a farm
- ( ) Other reason

2. Has this operation been sold, rented, or turned over to someone else?
(ENUM)If spouse is now operator, answer this as YES!

- (•) Yes
- ( ) No

Operation's Name: _____

Person Name: _____

Address 1: _____

Address 2: _____

City: _____

State: _____

Zip: _____

Phone: _____ ☐ Mobile

3. Was the new operation in business before June 1, 2025?

- ( ) Yes
- ( ) No

4. Is the operation managed?

- ( ) Yes
- ( ) No

5. Were any of the individuals associated with the new operation operating land individually before June 1, 2025?

- ( ) Yes
- ( ) No

6. Will the land be used for any agriculture purposes by you or anyone else in the next year? (Including growing crops or raising livestock.)

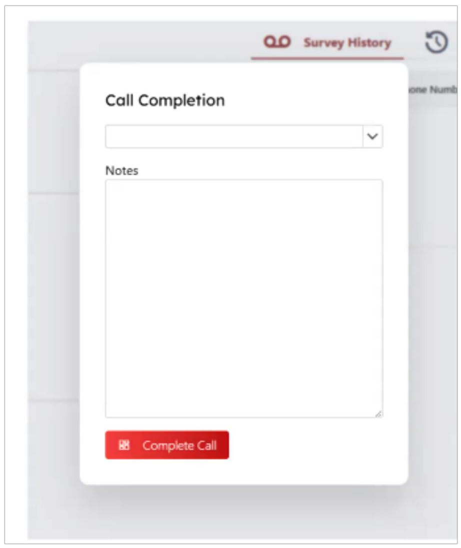
- ( ) Yes
- ( ) Don't Know
- ( ) No

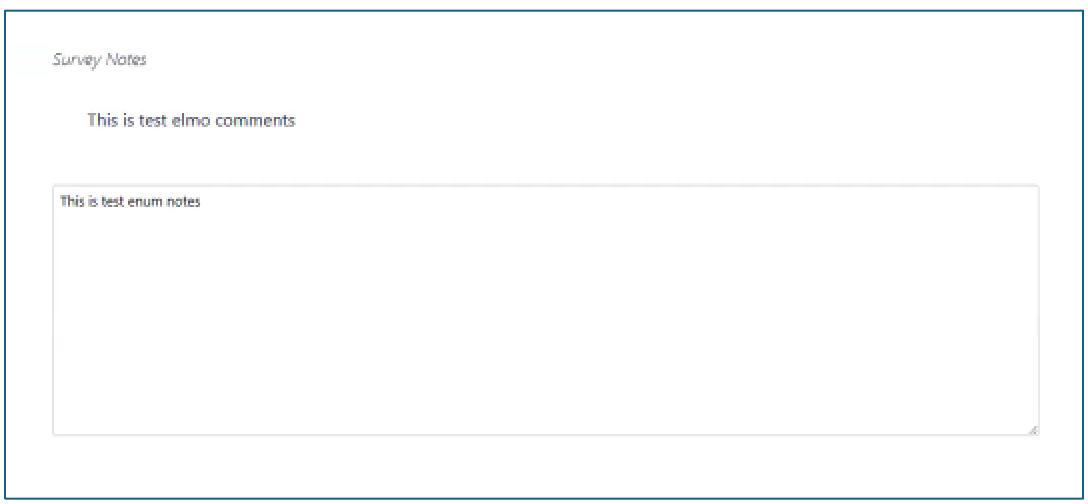
7. Please provide any additional comments:

Close Save

G. Comments

1. **Dial related comments** information that will help with the next enumerator attempting to contact this operator for this survey. These should be entered on the dial screen in the call completion screen or in the screen that appears after clicking 'Complete Sample'. (Note: this second screen is still being developed and renamed appropriately.)

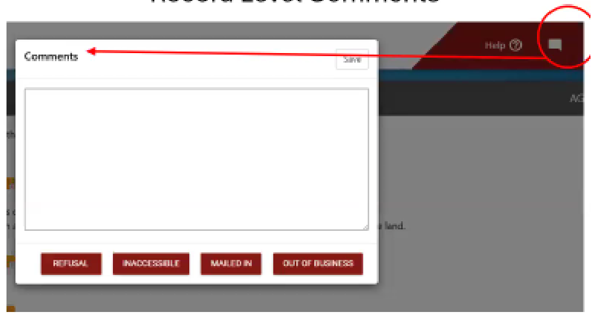




2. **Survey Related Comments** belong inside the questionnaire.
   a. **Record Level Comments** are comments about the operator or operation that help us understand the current state or future state. For example, heavy rainfall this spring has delayed planting of all crops. These comments are

entered inside the questionnaire, using the comment icon at the top right. Enter the comment and click ‘SAVE’.

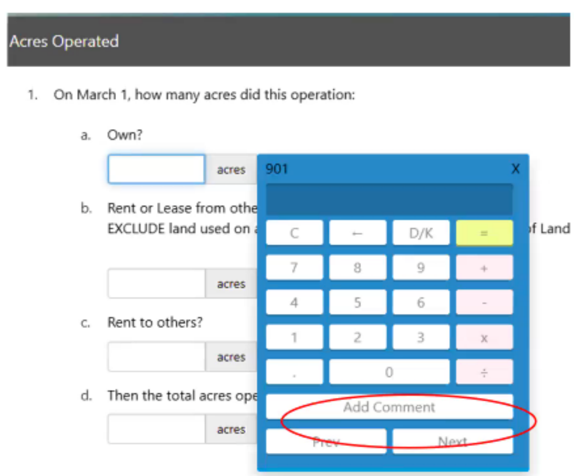
Record Level Comments



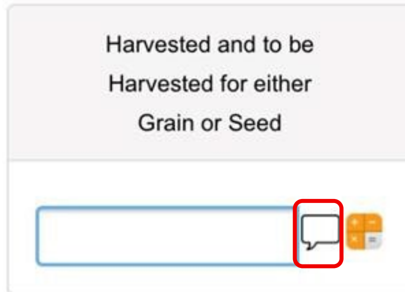
b. **<u>Item level comments</u>** are associated with one specific question. For example, if an operator tells you that their yield is extremely low due to drought or flood, or some of the planted acres will not be harvested for grain, this information should be left as an item level comment attached to the yield question. To leave this comment:

   i. Open the calculator next to a specific item in the questionnaire and click “Add Comment” at the bottom of the calculator. This will open a comment window.

Item Level Comments



   ii. Enter your comment and click ‘Save’. A small comment bubble will appear next to the input cell indicating there is a comment associated with that question.

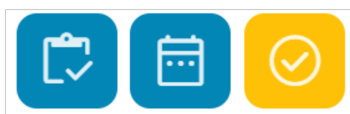


Note: Some surveys contain questions in the form of a grid with rows and columns. Item level comments cannot be left in a grid. In these cases, enumerators should use record level comments and reference the item code or question.

Chapter 4: Conducting Interviews – a Step-by-Step Guide

1. Login.
2. Check the configurations in the side bar menu if using Beta (to add a dummy phone number and mask PII).
3. Select CATI.
4. Select the desired survey.
5. Click 'Pull Next Sample'.
6. Dial (either by clicking on a number on the dial screen or clicking 'Make Next Call').
7. If the interview is NOT Initiated:
    a. End the call, code the call completion box, and click 'Complete Call'. (Make an appointment if requested)
    b. Dial another number for the same operation if available or if finished with this operator, **Skip to Step 9 Below.**

8. If the Interview is Initiated:
    a. Once a call connects, the following icons will show at the top of the screen.



    b. Click on the first icon 'Open Survey'.
    c. Alert the respondent that the call may be monitored and recorded and click 'acknowledged' to continue.
    d. Verify or update the address information for the operator/operation.
    e. Collect the survey data.
    f. Submit the survey.
    g. End the call.
    h. Code the Call Completion box and click 'Complete Call'.
9. Click 'Complete Sample'
10. Click 'Close Sample'
11. Click 'Pull Next Sample'

    OR
12. Log out - Click the icon at the top right with the user's initials, click log out, then close that tab in the browser.

Chapter 5: Skills Based Features

Different options are available to enumerators in READI based on the skills they possess in iSolved. Training is offered periodically to expand an enumerator's knowledge. As they gain experience, skills are added to their profile. Currently, there are seven different skills stored in iSolved that interact with the READI system. Depending on which skills one has, different screens and options will display.

A. Addressing List Frame Required Questions

Coming Soon

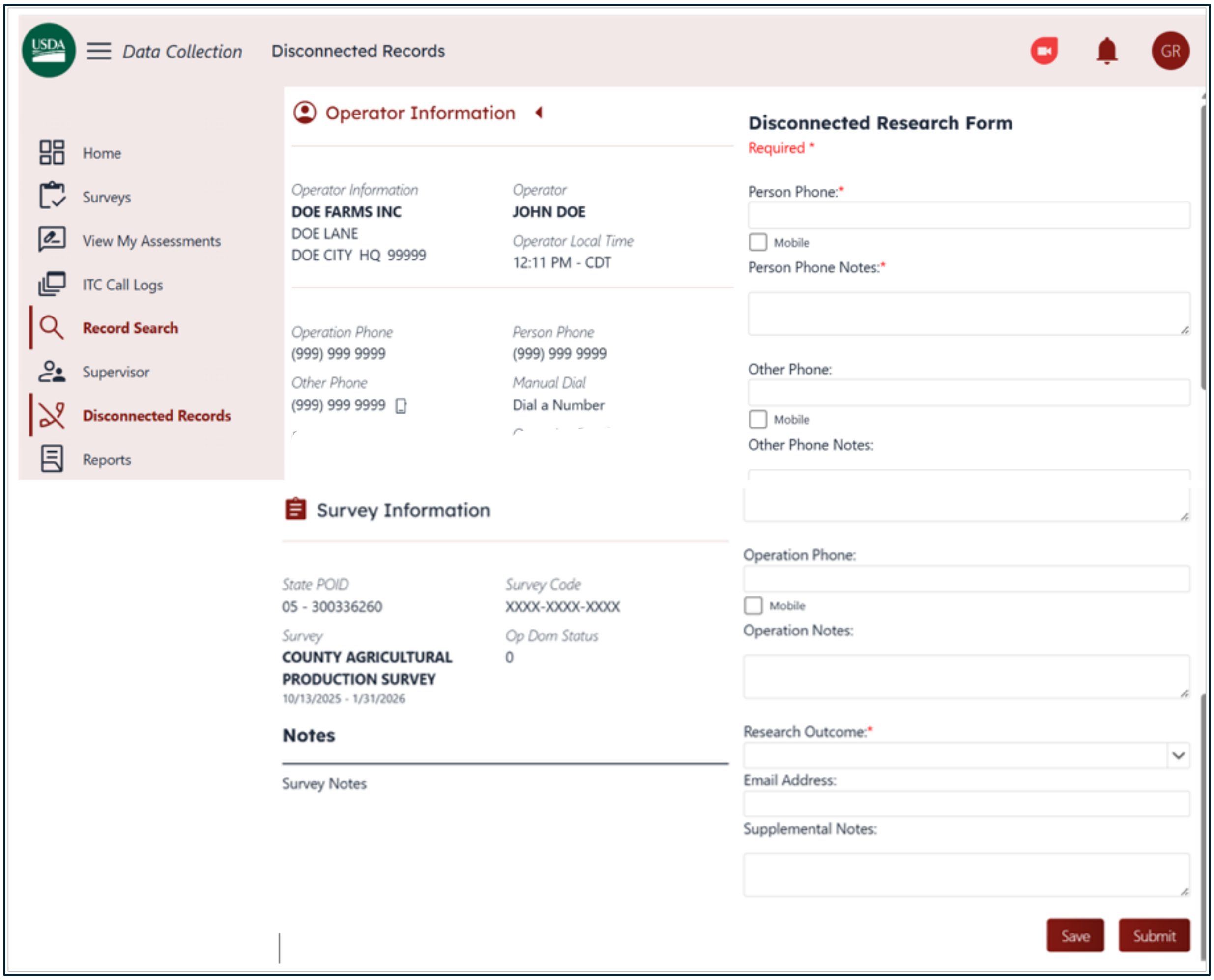
B. Conducting Complex Surveys

Coming Soon

C. Disconnect Lookups

The Disconnect Lookups skill allows users to work on finding new numbers for respondents. Currently, users must be on a Federal Laptop to access the FSA database and conduct disconnect research. Click on the Main Menu and then select "Disconnected Records'.

Information for disconnected records displays. Click on Research Form to record/see detailed information:



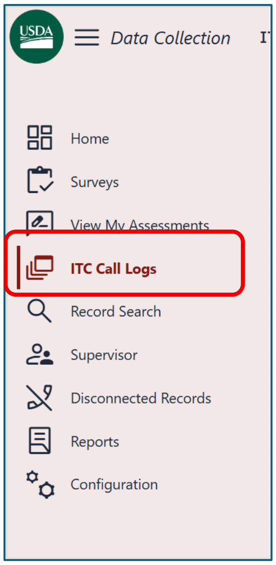
D. Handling Multiple Operations

Coming Soon

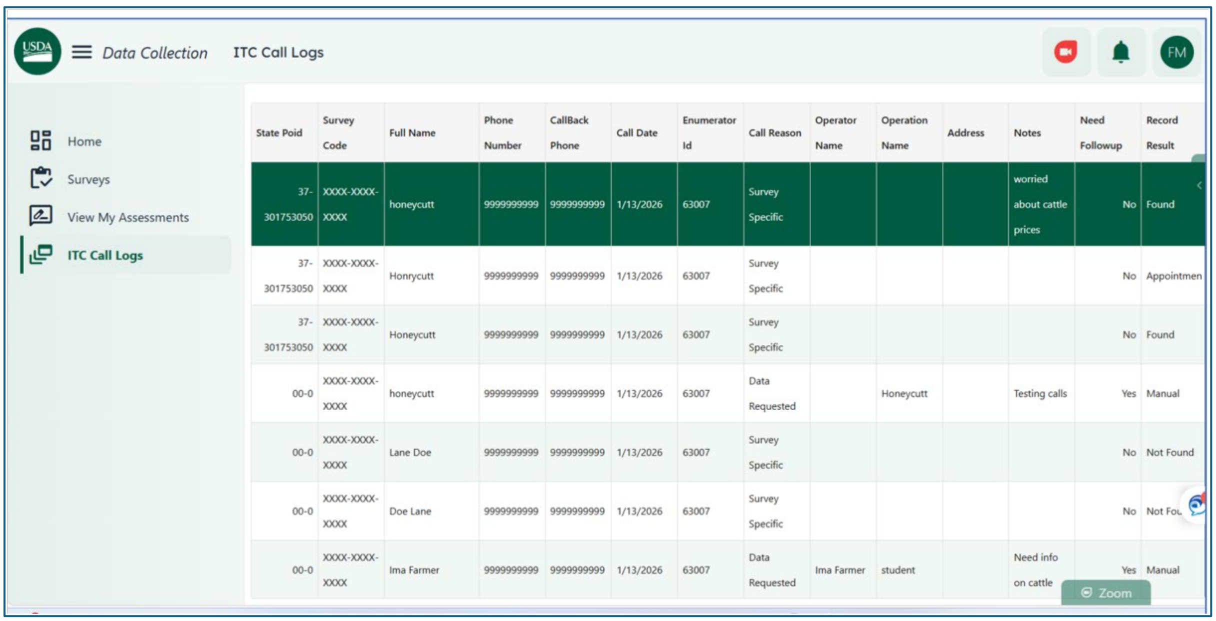
E. ITC-Incoming Telephone Calls

ITC refers to a phone line dedicated to NASS Respondents. They may have questions on a survey, want to complete a questionnaire, or request agricultural related information. The dedicated NASS Respondents' information line is **1-888-424-7828**. Live help is available from **8:00am-5:00pm CTZ.**

Users with the ITC skills marked in their iSolved account will be able to access the ITC Call Logs option on the READI Home page under the side bar menu.



Click on ITC Call Logs and the following screen will display:



State Poid	Survey Code	Full Name	Phone Number	CallBack Phone	Call Date	Enumerator Id	Call Reason	Operator Name	Operation Name	Address	Notes	Need Followup	Record Result
37-301753050	XXXX-XXXX-XXXX	honeycutt	9999999999	9999999999	1/13/2026	63007	Survey Specific				worried about cattle prices	No	Found
37-301753050	XXXX-XXXX-XXXX	Honrycutt	9999999999	9999999999	1/13/2026	63007	Survey Specific					No	Appointmen
37-301753050	XXXX-XXXX-XXXX	Honeycutt	9999999999	9999999999	1/13/2026	63007	Survey Specific					No	Found
00-0	XXXX-XXXX-XXXX	honeycutt	9999999999	9999999999	1/13/2026	63007	Data Requested		Honeycutt		Testing calls	Yes	Manual
00-0	XXXX-XXXX-XXXX	Lane Doe	9999999999	9999999999	1/13/2026	63007	Survey Specific					No	Not Found
00-0	XXXX-XXXX-XXXX	Doe Lane	9999999999	9999999999	1/13/2026	63007	Survey Specific					No	Not Fo
00-0	XXXX-XXXX-XXXX	Ima Farmer	9999999999	9999999999	1/13/2026	63007	Data Requested	Ima Farmer	student		Need info on cattle	Yes	Manual

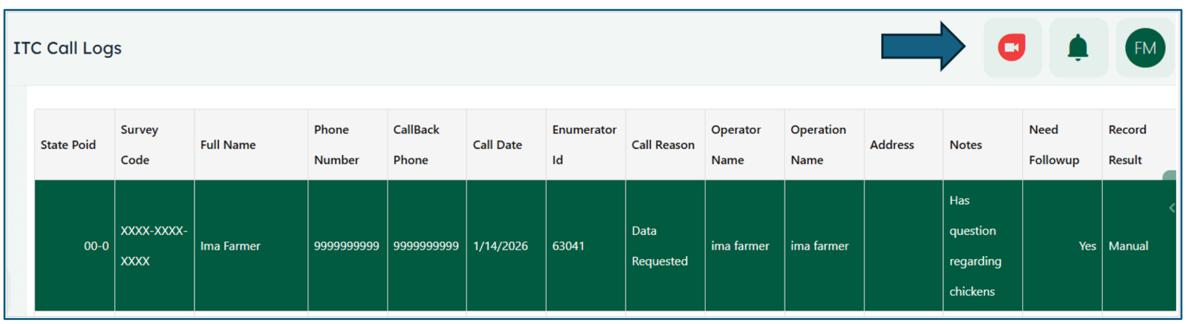
Several columns of information are included in this table. Most are self-explanatory. Others are defined as follows:

- <u>Call Reason</u> – this is selected on the call information screen (see further down in this section for definitions).
- <u>Need follow up</u> – this is selected in the call back screen and indicates if further follow up is needed or if the record is resolved.
- <u>Record Result</u>

- Found- the record was found. It may be completed or have notes left in the dial screen.
- Not Found – the record was not found. Most likely, the respondent is calling back more than 30 days after the survey ended and those records no longer show.
- Appointment – An appointment was made.
- Manual – the record had an Other Issue, USDA Concern, Data Request, or General Inquiry and was manually entered.
- Inactive Surveys – records that are past the due date and are not available/closed, but less than 30 days past.

RECEIVING INCOMING TELEPHONE CALLS:

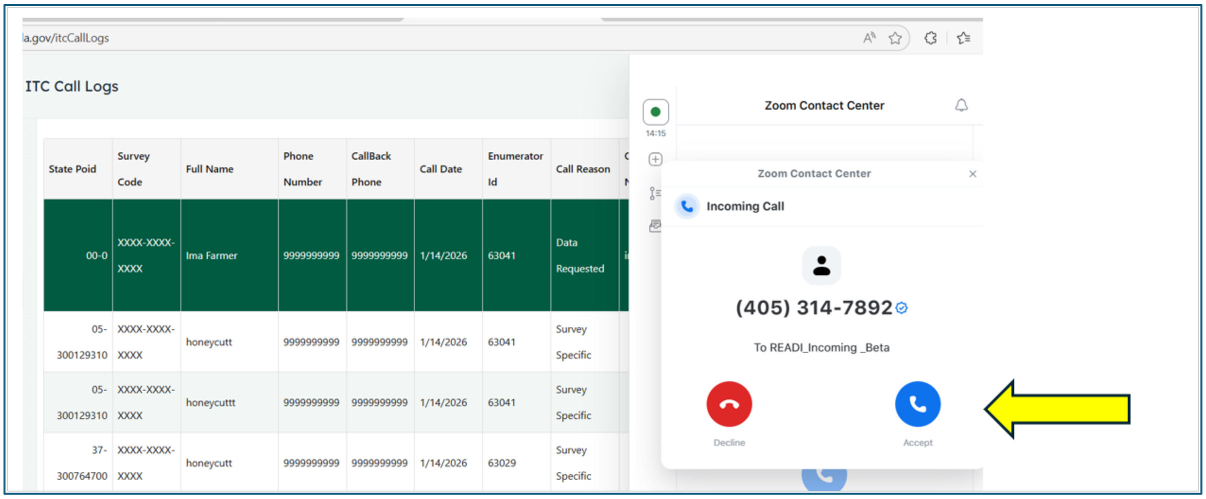
1. On the home screen, select CATI.
2. Maximize your Zoom Contact Center screen and verify you are connected.
3. Open the side bar menu and click on 'ITC Call Logs'.
4. Click on the Toggle Zoom Status on the right. It will change from red to green to indicate you are available to take incoming calls. It will also grey out 'Surveys' in the side bar menu since enumerators cannot make outbound calls while they are available to take ITC calls.


ITC Call Logs

FM

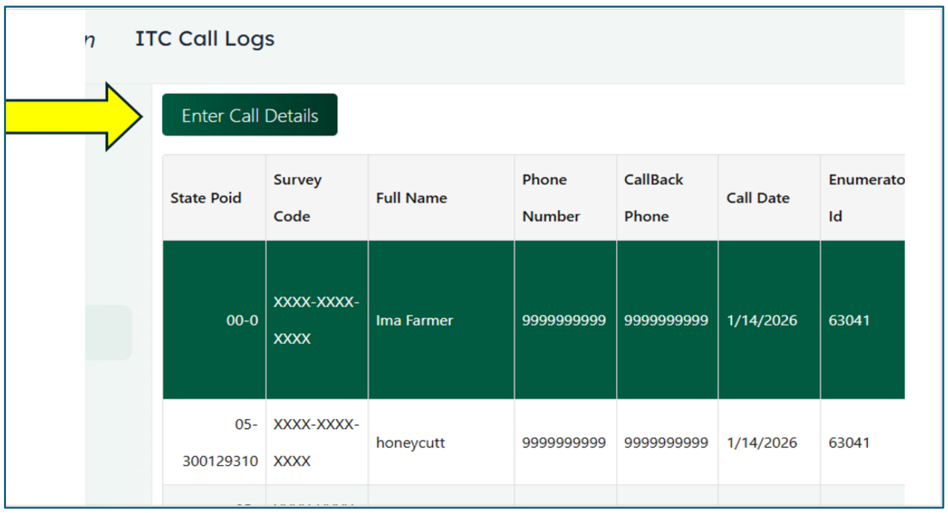
State Poid	Survey Code	Full Name	Phone Number	CallBack Phone	Call Date	Enumerator Id	Call Reason	Operator Name	Operation Name	Address	Notes	Need Followup	Record Result
00-0	XXXX-XXXX-XXXX	Ima Farmer	9999999999	9999999999	1/14/2026	63041	Data Requested	ima farmer	ima farmer		Has question regarding chickens	Yes	Manual

5. When you receive an incoming call, click 'Accept' and minimize the Zoom Contact Center screen.

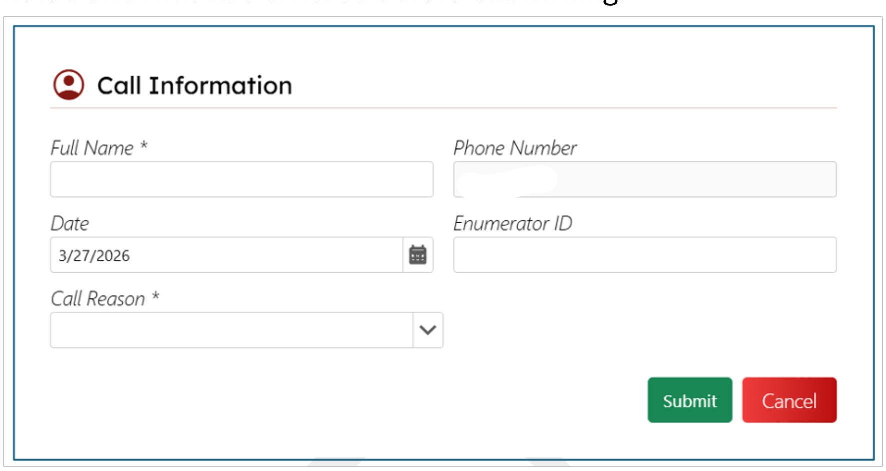


6. An ‘Enter Call Details’ button will appear on the far left. Click this button.

Enter Call Details will only appear with an incoming call



The Call Information Screen displays. Items with an asterisk are required fields and must be entered before submitting.

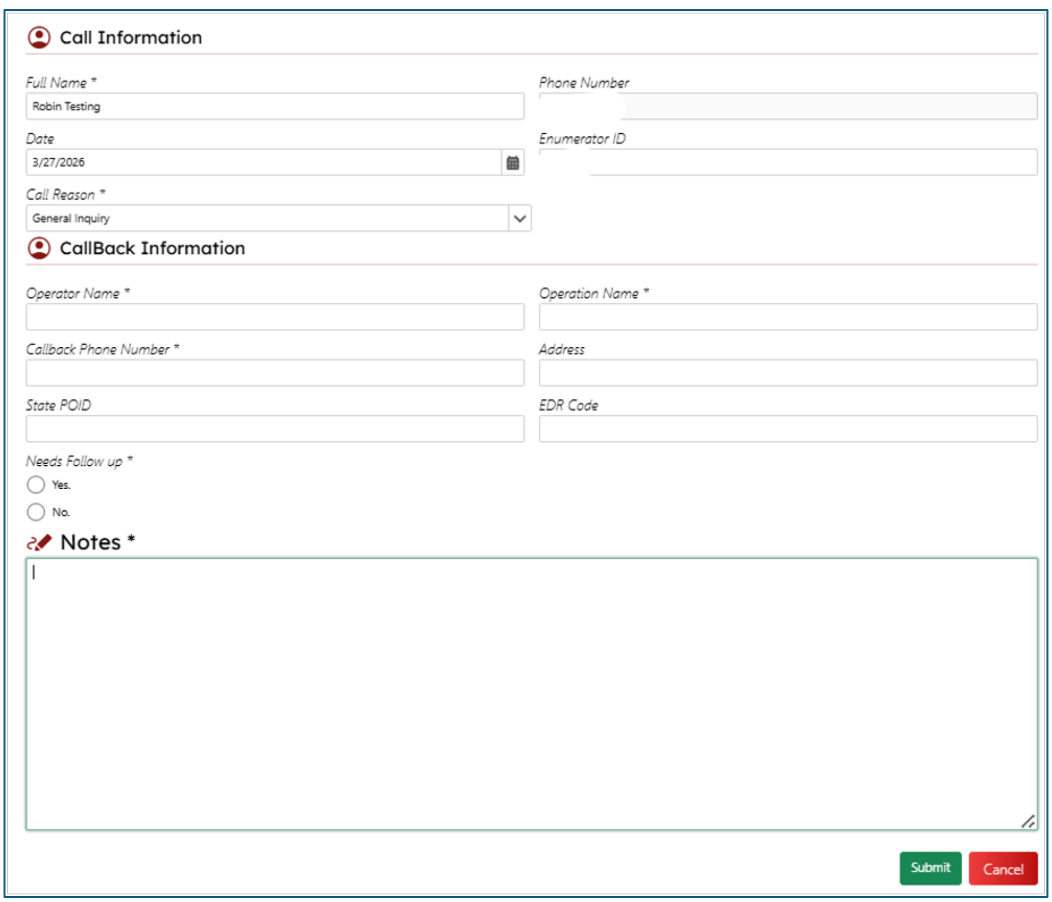


The Call Reasons are defined as follows:

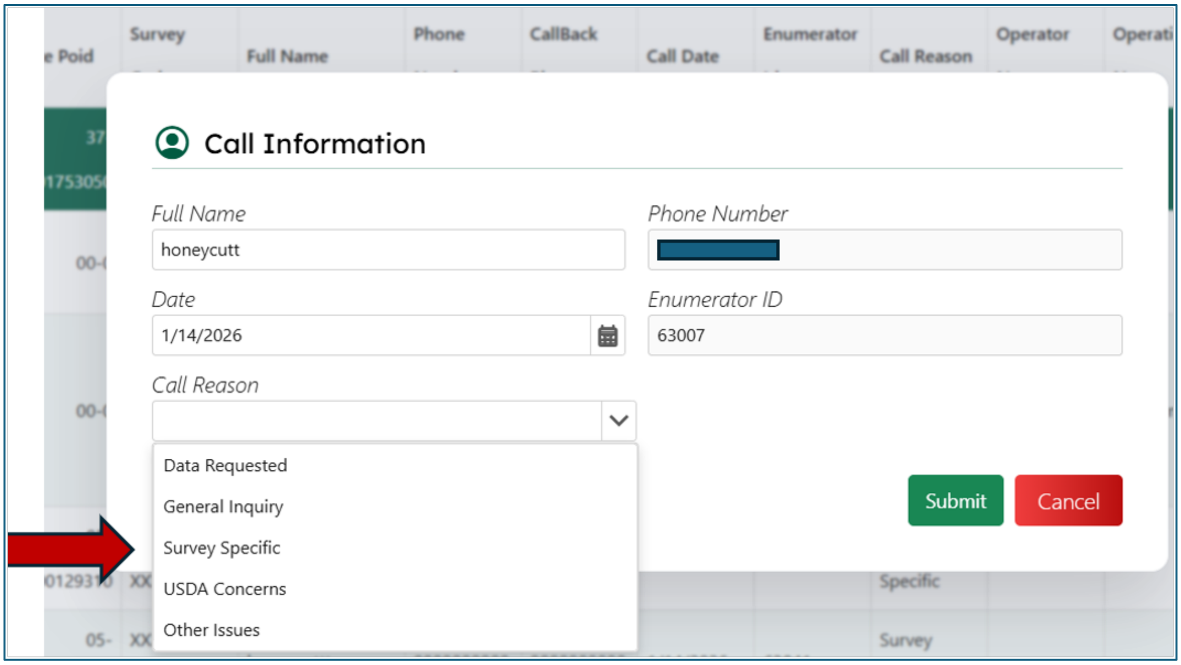
- **Data Requested** – Needs data or information (statistics)
- **General Inquiry** – Typically looking to know who NASS is and verify we are a legitimate government agency.
- **Survey Specific** [1/] -Use this option when the caller is returning our request to complete a survey.
- **USDA Concerns** – Needs information regarding any USDA agencies
- **Other Issues** – Request does not fall into any of the categories above.

[1/] **Survey Specific – Skip to #8 below**.

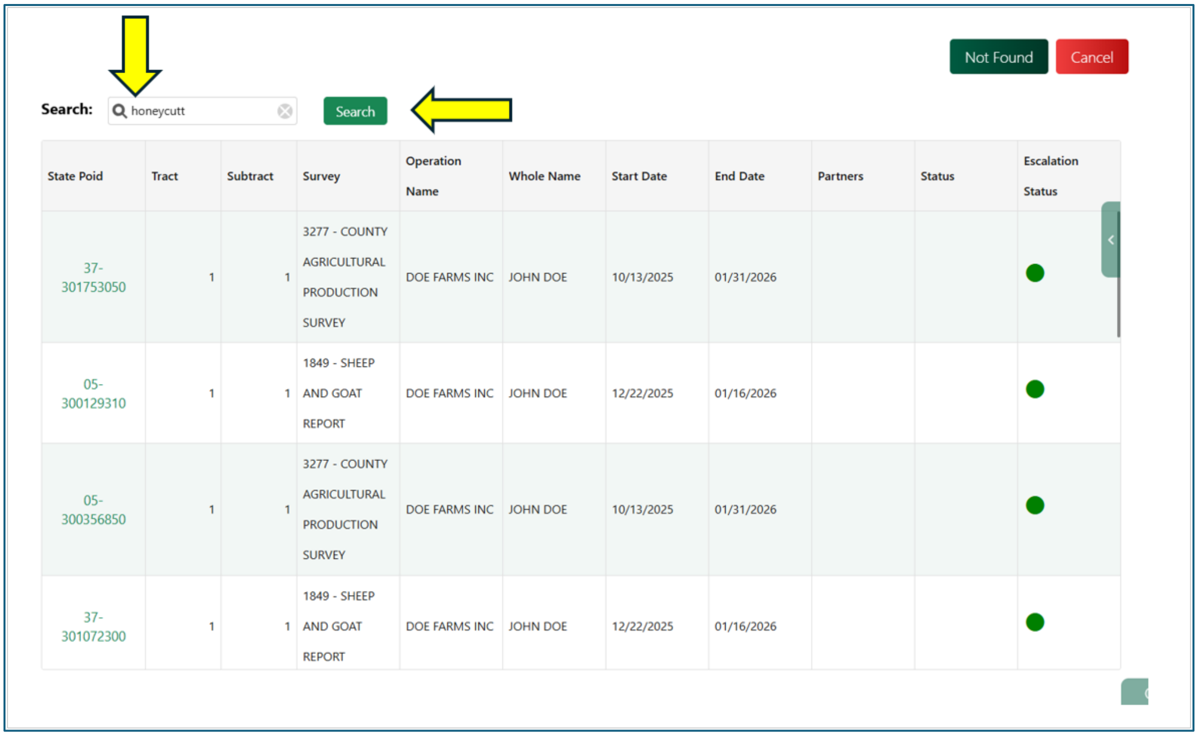
7. Enter the respondent's full name and call reason. The phone number and enumerator ID will be prefilled. For all call reasons except Survey Specific, the Callback Information section will display at the bottom of the Call Information screen. Enter the required fields and click 'Submit'. If follow-up is needed or requested the ITC Manager will be notified by the ITC staff. That Manager will then address or elevate to the NDC Associate Director.



8. If the respondent is calling back to complete a survey, select Call Reason= Survey Specific.



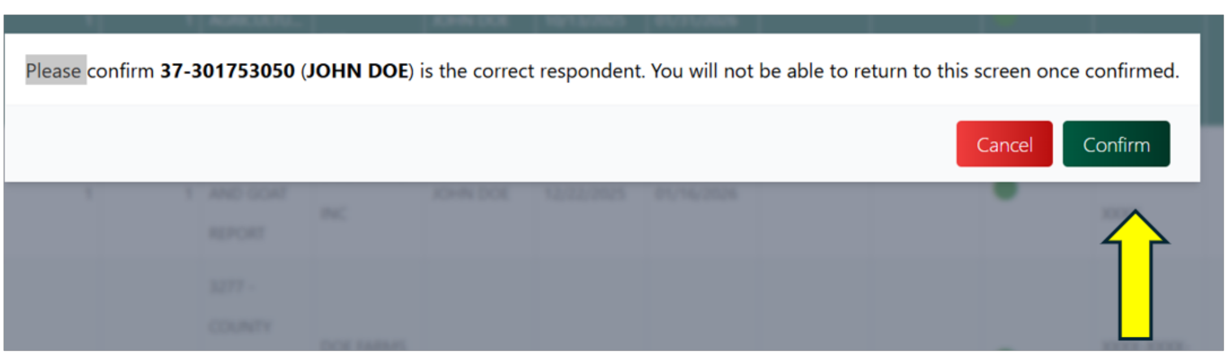
9. This will take you to the search tool where you can search for the record by name, phone numbers, state poid, and survey codes. (This screen replaces the lookup users previously did using SMS; for those familiar with that system). Surveys will show 30 days prior to their start date and continue to show until 30 days past their due date.



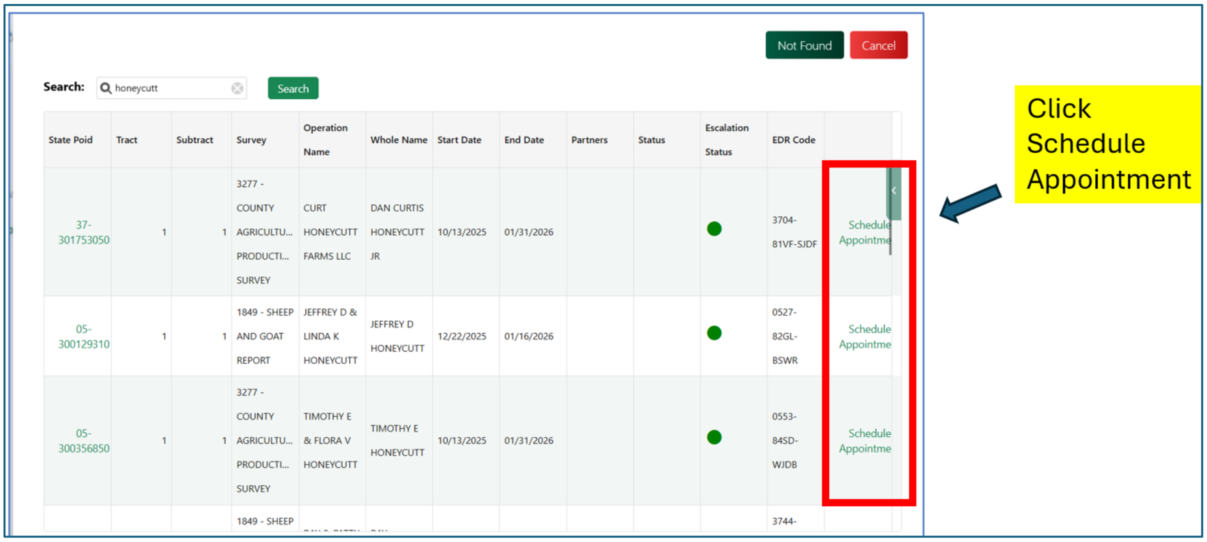
<u>Escalation Status</u> – This displays after the user searches for a record in the listing. It refers to the survey dates. Clicking on the dot will show the status. Statuses are defined as follows:

- Green =survey is active
- Yellow= survey is close to its end date
- Red = survey is closed

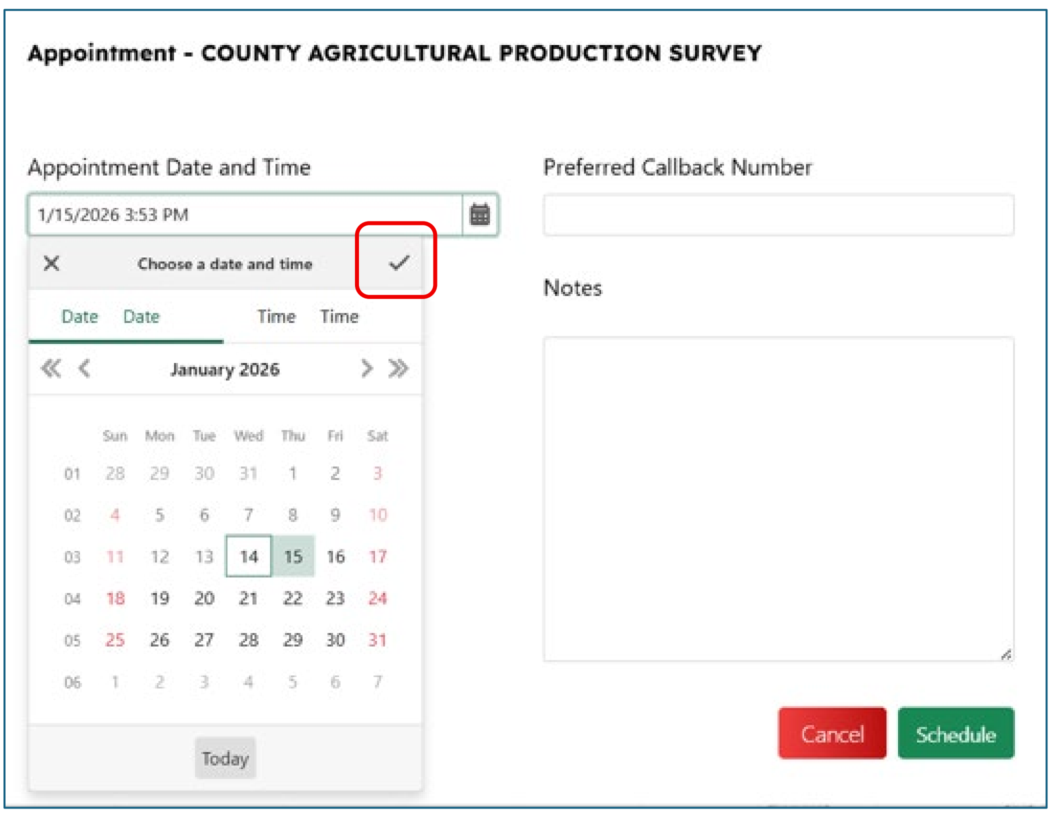
10. **If the record is found and the respondent is willing to complete the survey**, click on the state-poid hyperlink in green. Confirm you have the correct record. The Dial Screen will display, and the user can complete the survey. Once complete, the system returns to the ITC Call Logs screen.



11. **If the record is found but the respondent would like to make an appointment** to complete the survey at a later date or time, click ‘Schedule Appointment’ at the right.



Enter the appointment date and time, click the check mark to save, enter a preferred callback number, any notes and click schedule.

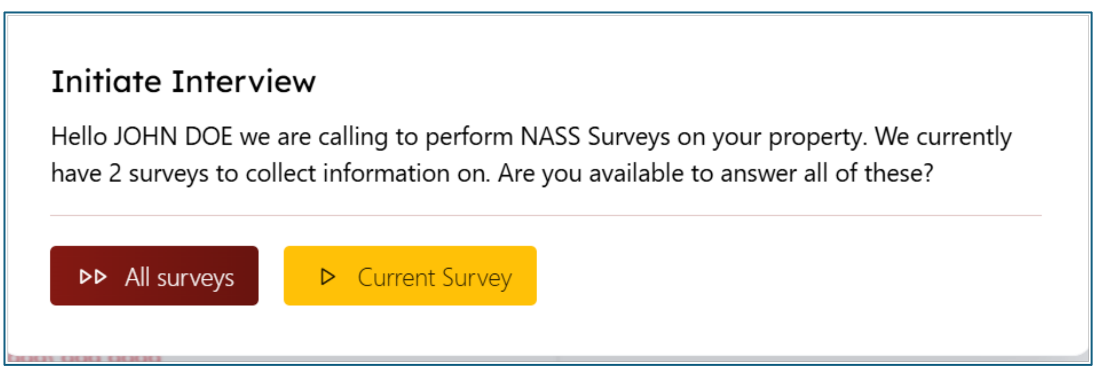


12. **If the record is NOT found**, click 'Not Found' at the top right. The record is added to the call logs with a status of NOT Found. The ITC Manager will look daily at these call logs to identify records NOT found. This should be a rarity and is most often because surveys do not show in READI more than 30 days before the survey start date or more than 30 days after the due date. Enumerators should prompt the respondent to look for a reference date located on the front of their letter or questionnaire to determine if it is past the 30-day rule. If it is within the 30-day rule, enumerators should tell respondents they will elevate it to their manager and be in touch shortly. Verify the number they are calling from is the best number to call.

F. Managing Coordinated Records

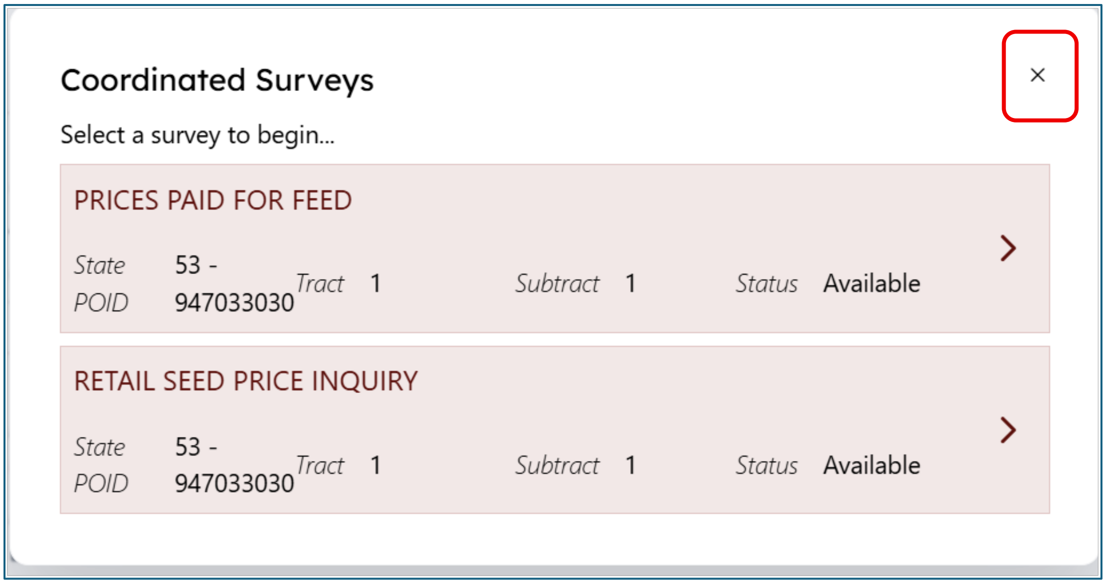
Sometimes respondents are selected for multiple surveys at a time. READI can deliver those surveys together to avoid multiple calls to the same person and reduce respondent burden.
Enumerators with 'Managing Coordinated Records' skills are eligible to collect data for respondents selected for more than one survey. The 'Open Survey' icon will have a number indicating the number of coordinated surveys.

Click the 'Open Survey' button at the top right to preview the multiple surveys the operator is selected for.



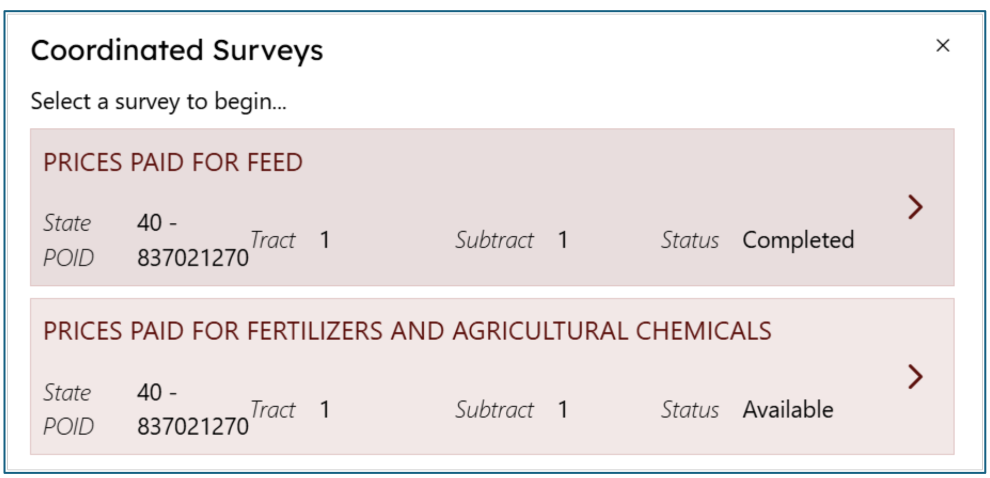
At this time, do not use the 'Current Survey' option as it is not working as expected.

Click 'All surveys' to see the surveys the respondent is selected for.



Close the screen using the ‘X’ at the top right to return to the READI Dial Screen.

Once connected with the respondent, click back on ‘All Surveys’ and select the survey they wish to complete first by clicking on the arrow to the right. After the first survey is complete and submitted, it will route back to this screen. Notice the first survey has the status updated to ‘Completed’. Select the next survey the respondent wishes to complete.



When all surveys are complete and submitted, the system returns to the READI dial screen.

G. Refusal Conversion Techniques

Coming Soon

Chapter 6: Miscellaneous

A. Partially Completed Surveys

1. If a respondent requests to make an appointment to finish a partially completed survey:

    - Within the survey, select the 'Back to READI' icon The system will save data you've entered in the survey.

    - On the READI dial screen, click the 'Schedule Appointment' icon and set the appointment.

    - The 'Call Outcome' will be set to Appointment. Leave a comment for the next enumerator indicating the record was started and not finished.

2. If a respondent hangs up in the middle of an interview:

    - Within the survey, select the 'Back to READI' icon The system will save data you've entered in the survey.

    - On the READI Dial screen, code the call outcome as "Hung Up'.

B. Multiple Operations

- Operators previously identified as having multiple operations (Sometimes referred to as OpDom 85/45 records) are not collected in READI CATI at this time. These operators are currently enumerated through the CAPI Pooler system as it can collect data for multiple operations. In the future, the READI system will have this ability.
- If an enumerator finds an operator that has additional operations during a READI CATI interview, they should complete the original questionnaire, recording the new additional operations' contact information within the

questionnaire. No additional survey data can be entered through READI CATI at this time.

C. Multiple Modes

In certain instances, a survey might be initiated in one mode, then completed in another. Below shows the definition of each mode as well as details for each scenario:

Definitions:

- **CAWI** -Computer Assisted Web Interview - also referred to as EDR or Web.
- **CATI** - Computer Assisted Telephone Interview
- **CAPI** - Computer Assisted Personal Interview

Scenarios:

1. Survey started in CAWI, then called in READI CATI – Data already entered in CAWI **WILL** show to enumerators in READI CATI.
2. Interview started in CAPI, then called in READI CATI – Data already entered in CAPI **WILL NOT** show in READI CATI.
3. Interview started in READI CATI, then respondent finishes it in CAWI – Data already entered in READI CATI **WILL NOT** show for the respondent in CAWI.
4. Interview started in READI CATI, then pushed to CAPI for field follow up- Data already entered in READI CATI **WILL** show for enumerators in CAPI.

Chapter 7: Calling Standards and Best Practices

A. Rules of Contact

1. Scroll to the bottom of the dial screen to read all record level comments.
2. All phone numbers on the dial screen should be attempted.
3. All partners should be contacted.
4. All phone numbers in comments should be attempted.
5. If someone other than the operator answers and the operator is not available, ask that person (spouse, son, etc.) if they would be able to assist with the [Survey name] report. If able to assist, complete the interview. On the last page of the interview record their name as the person completing the interview.

B. Standard Introduction

'Good *[morning/afternoon/evening]*. This is *[name]* calling on behalf of the National Agricultural Statistics Service, USDA.' **Based on their response you must formulate your approach. NASDA prefers the following:** How are you today? We are currently collecting information on the [Survey name] report. Would you have a few minutes to assist? Thank you again for taking a few minutes with me today and I wanted to let you know this call will be monitored and recorded'.

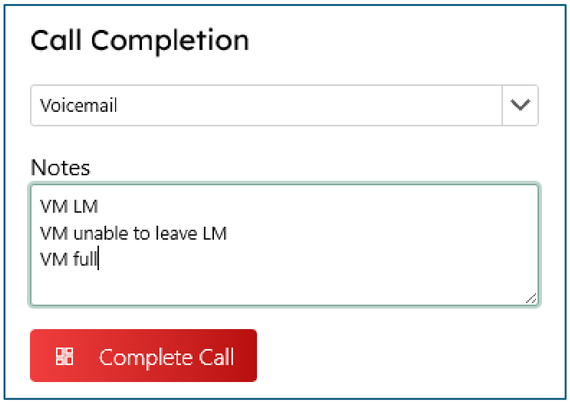
***NOTE:* On every call you MUST say 'This call will be monitored or recorded.**

C. Standard Voicemail

'Good *[morning/afternoon/evening]*. This is *[name]* calling on behalf of the National Agricultural Statistics Service, USDA. Sorry we missed you we will try again later.'

- Voicemail should be left on first dial attempt.
- Leave a Voicemail message on each number that appears on the dial screen.
- On the Call Completion Screen in READI code the call as Voicemail and leave a note.

  Abbreviations are allowed only as indicated below.
  - **VM LM** = Voicemail, Left Message
  - **VM unable to LM** = Voicemail unable to Leave Message
  - **VM full** = Voicemail was full and could not leave a message



- A second Voicemail will be left when 3 days remain in that survey's data collection period. (Exceptions will be communicated by your supervisor depending on the length of the survey.)

  Message: 'Good *[morning/afternoon/evening]*. This is *[name]* calling on behalf of the National Agricultural Statistics Service, USDA. Sorry we missed you again. With only a few days left in the data collection period for our *[Survey name]* report if you wish to report please call 1/888 424-7828.'

D. Standard Abbreviations

- Approved
  - VM LM = Voicemail Left Message
  - VM unable to leave LM = Voicemail unable to Leave Message
  - VM full = Voicemail was full and could not leave a message
- Not Approved
  - Everything else.
  - Spell out when tempted to abbreviate
    - Spell out Wrong Number, Not in Service, Do Not Call, etc.

E. Format for Comments Left on the Dial Screen

- [Date] [Comment] [Initial]
- Example: '3/20 Wife cannot answer. JR'

F. Disconnect Procedures

- All numbers listed on a record should be attempted including those phone numbers that appear in comments.
- If ALL numbers have been disconnected the record will appear on the Disconnect Listing and researched by the NDC Disconnect Team.
  - If a dial result is 'Not in Service' code as a disconnect.
- If multiple phone numbers are available for a record, call each number. If one of the numbers has been disconnected the READI system prompts you

to code that one number as a disconnect. The record will now appear with a red circle and x indicating that number has been disconnected. The other available phone number(s) for that record should still be attempted and data collection should continue.

G. Fast Busy

- Fast busy is not common when using Zoom. If this occurs it means the network could not establish a connection. This is normally temporary.
- Code the record as 'No Answer'. And leave a note '3/20 Number ending in 1234 comes back as fast busy JR'.
- The record should be called 3 more times over a period of 3 days then coded as a 'Disconnect'.

H. Pick-Up, Hang -Up

- Someone answers the phone and hangs up.
    - Callback one time with this standard message: 'I am sorry I think our call may have been disconnected.' Continue with the standard introduction. If they hang-up again code as a refusal.
    - DO NOT call back a 3rd time.

I. Inaccessible Records

- Coding calls as inaccessible should be limited.
- Only code as inaccessible if the operator is not available the entire survey period.
- If coding of records inaccessible becomes excessive you will be required to get Coach approval before coding a record as such.

J. Out of Business

- Comments are required for all Out- of- Business operations.
- Do not ever promise to remove someone from the list.

K. Phone Numbers Outside the United States

- Zoom will not allow you to call records outside of the United States.
- A message will appear saying 'Unlicensed for this country'.
- Code all such records as 'Inaccessible'.

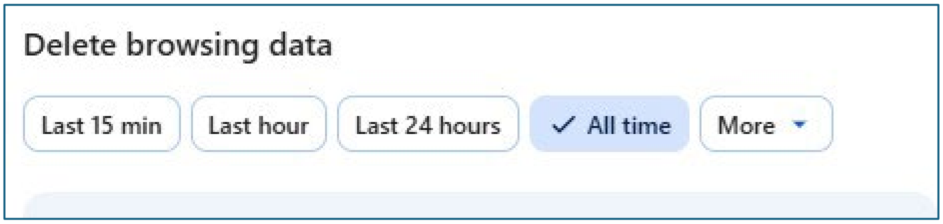
L. Address Verification

- Be sure to verify the address, phone number and email listed for the operator and any partners when you first open a survey on the Address Verification Page.

Chapter 8: Troubleshooting

A. READI Login

- Clear browsing history. On the keyboard select Control/Shift/Delete. Browsing history 'All Time' should be selected.



- Refresh your Google Chrome or MS Edge browser using the  icon.

- Switch browsers. Sometimes a session gets hung in a browser. Switch between Google Chrome and MS Edge as needed.

- Go to Login.gov. Do you have access? https://secure.login.gov/ Double check you have entered your email and password correctly.

- Check your Internet connection. If your signal strength is not good it may slow or prevent you from accessing the system.

    - You may use your mobile hot spot on your cell phone for Internet service if needed.

    - New NASDA equipment will have Internet provided at the 5G speed.

Chapter 9: Managers/Coaches/Trainers

This chapter covers features available only to users with roles of manager, coach or trainer.

A. Home Page -Dashboard

This feature is only available to users on a federal laptop.

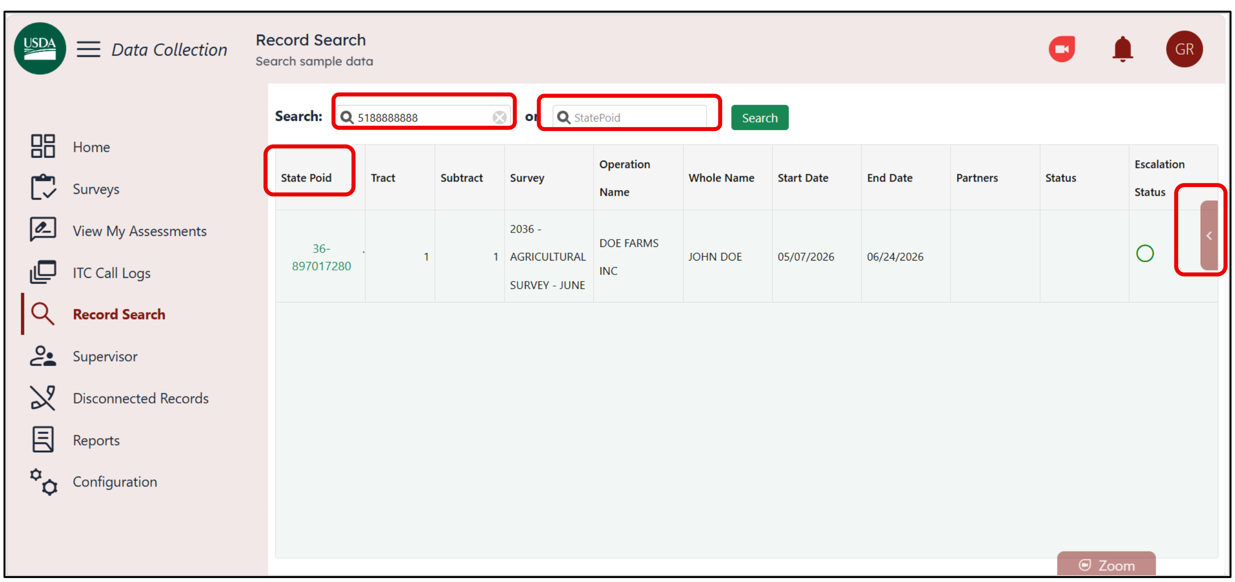
B. Home Page – SMS

This feature is only available to users on a federal laptop.

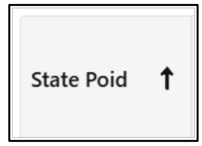
C. Side Menu- Record Search

The record search feature looks through all active surveys in the READI system currently and for the past 30 days. It does not limit to the survey currently selected in the Surveys Selection screen.

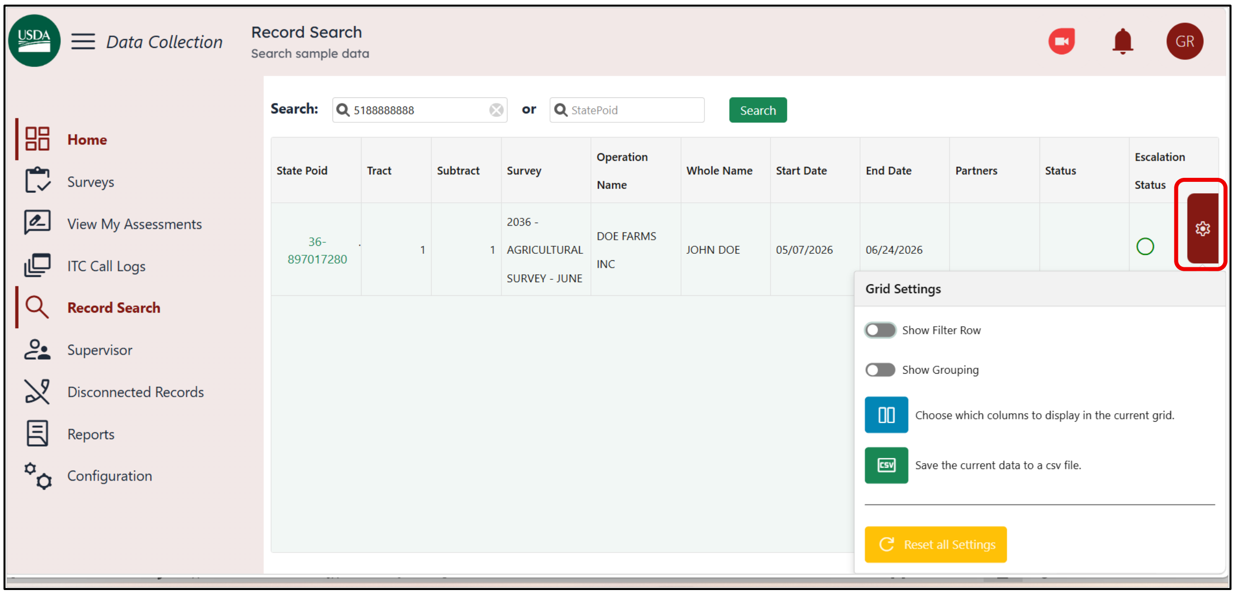
- In the first search box you can enter a name, address, phone number, or EDR survey code.
- In the second box you can enter a state poid
  - Do not enter hyphens or spaces
  - For state fips less than ten, it is not necessary to enter a leading zero (i.e. you can enter **6**917306000 or **06**917306000 and return the same result).



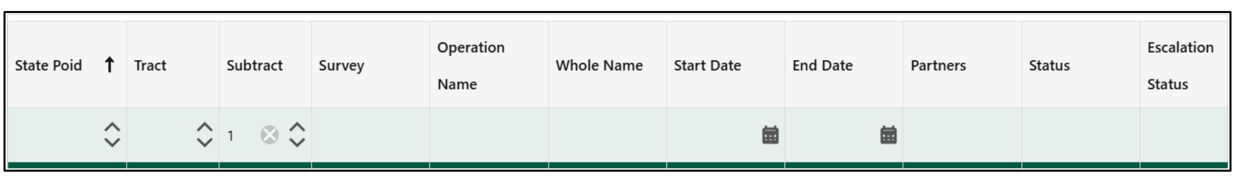
- Click in a header box and an arrow will display to sort the listing ascending or descending by that item.



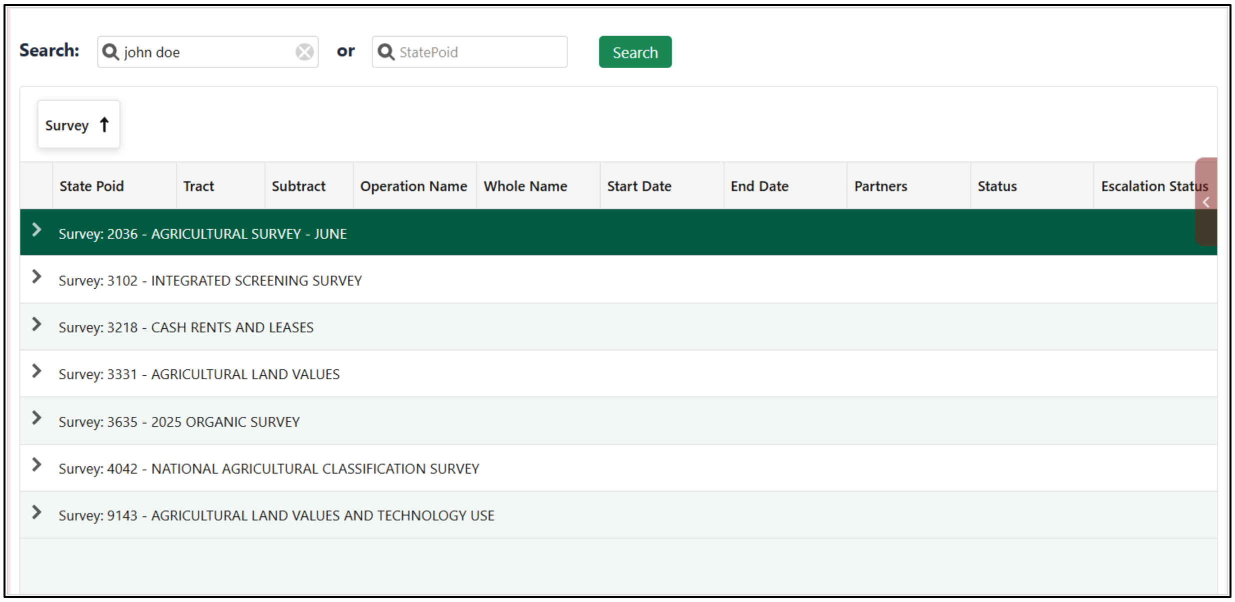
- Click on the side arrow on the right once to change it to a settings icon, click again and it will bring up a menu of settings for your search grid.



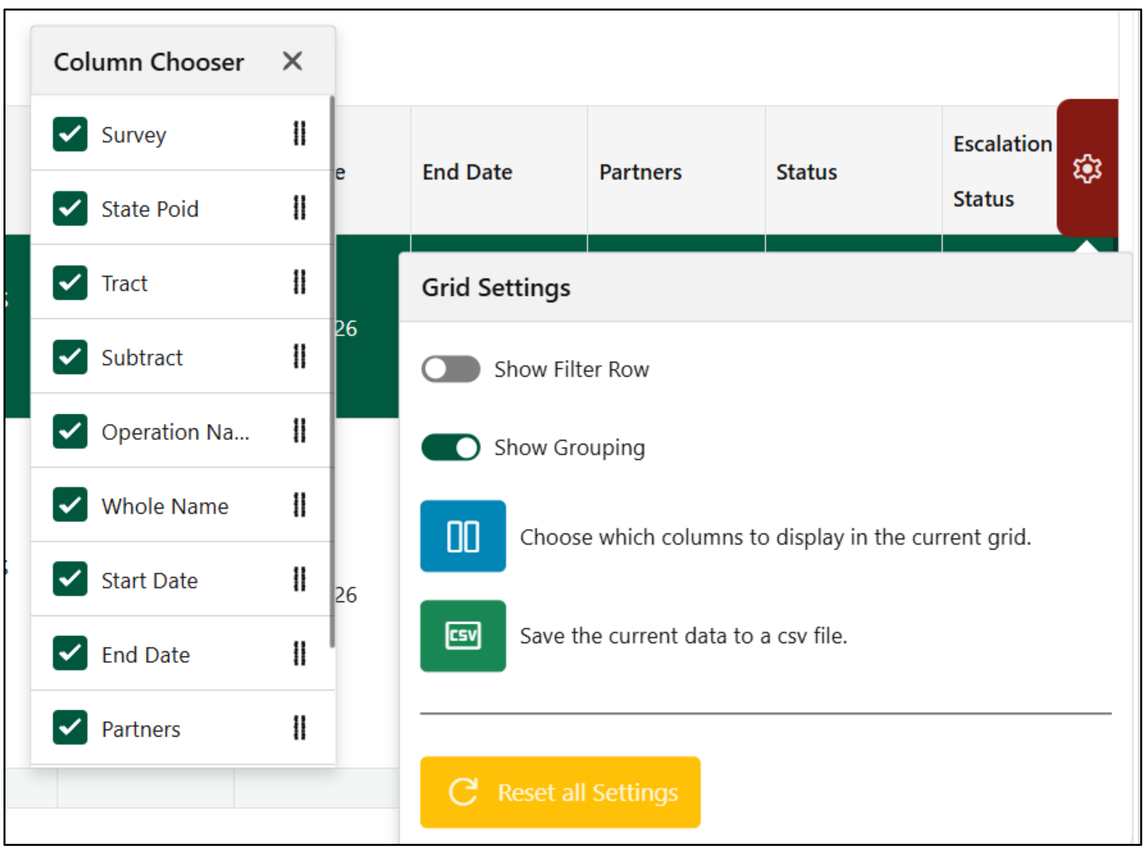
- **Show filter row** -turn this on to see filters available for select headers



- **Show grouping** – allows you to drag a header to the top and group by that item. Drag it back to the title row and it will reset. Click the arrows on the left to expand/collapse each group.



- **Choose which columns to display in the current grid** – allows you to customize which columns display in the grid.
  - Add or remove items by clicking the check mark.
  - Click and drag the two lines on the right side to move items up/down and the grid display order.

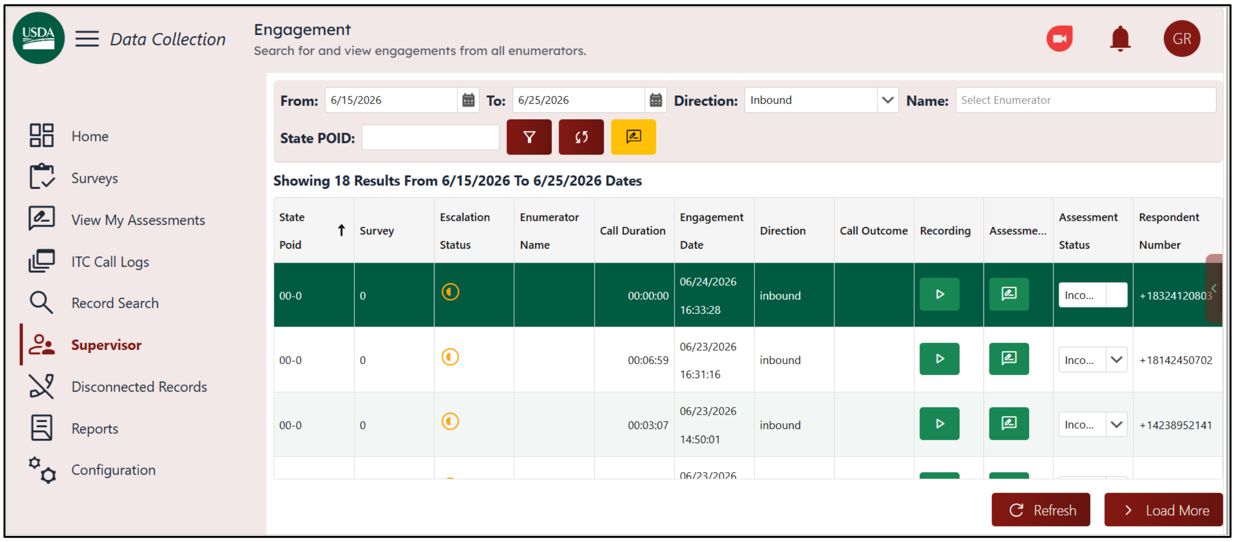


- **Save the current data to a csv file** allows the user to save the grid as it is currently displayed to a csv file outside of READI.
- **Reset all Settings** will return the listing to the default display.

D. Side Menu- Supervisor

i. Engagement

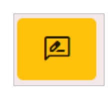
This area will display interview recordings for Supervisor review.

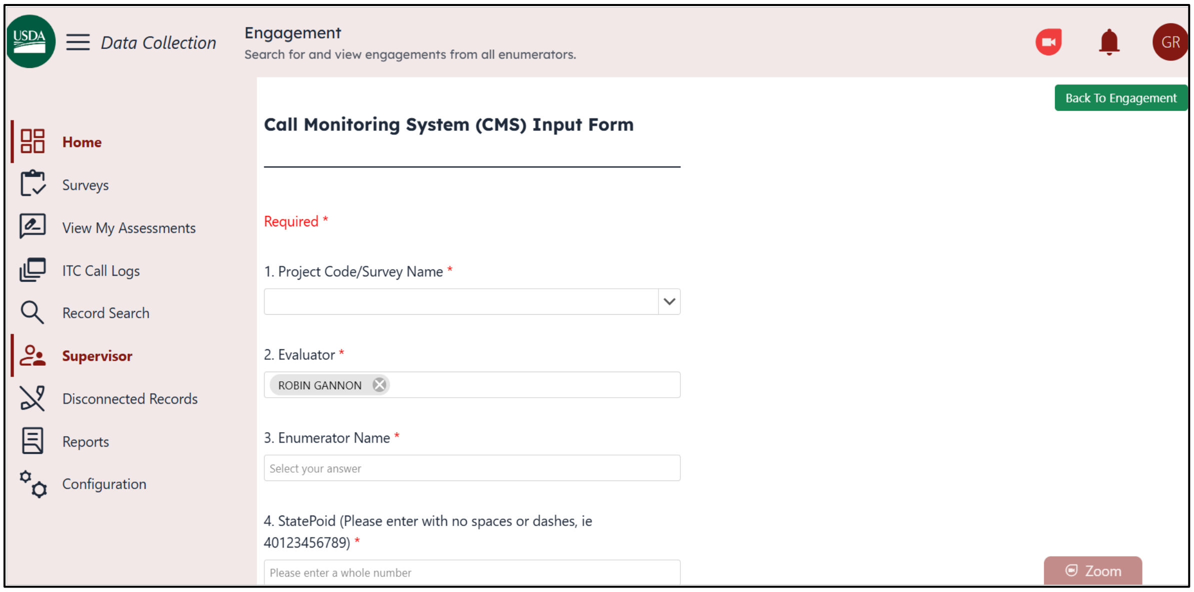


- Users can **Filter** the list of recordings by narrowing the date range, specifying inbound or outbound calls, entering an enumerator name, or a state-poid across the top and clicking the filter icon.

- Use the **Reset** button to return the full set of recordings.

- Use the **New Assessment** button to bring up the Call Monitoring System (CMS) Input form to manually enter an assessment for an engagement. Here supervisors can enter identifying information and complete a series of 25 evaluation questions.





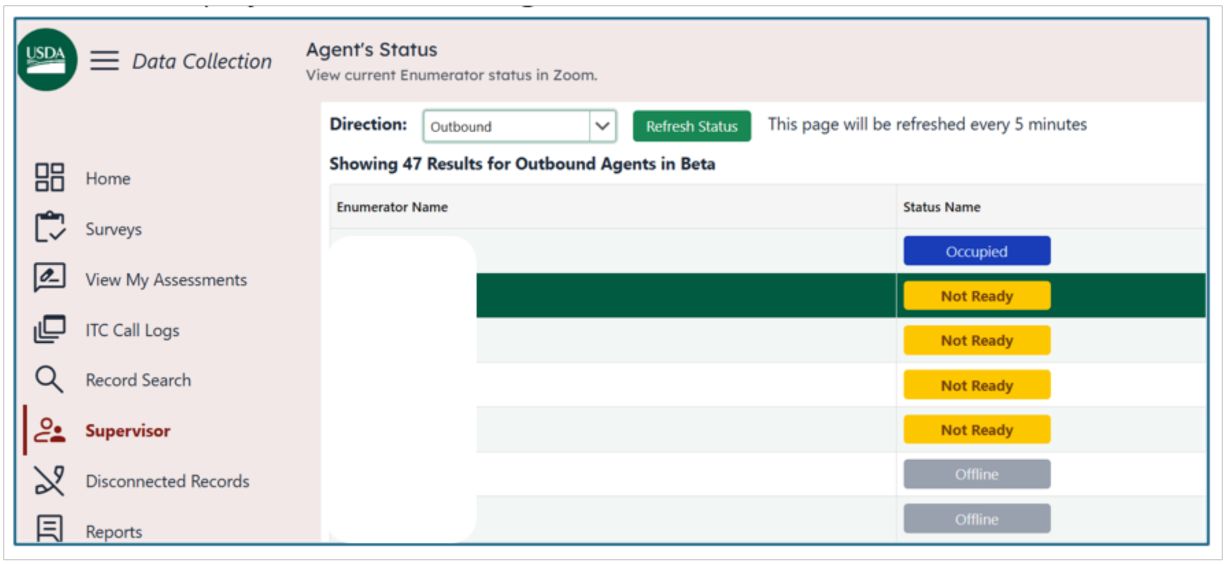
- Click the arrow bar on the far right to display the settings. Options under settings are identical to those described above in Chapter 9-Section C- Record Search.

- Engagement Grid Column Definitions:
  - **State-Poid** -this column is auto-populated for inbound calls and displays 00-0 for outbound calls.
  - **Survey** – this column is auto-populated for inbound calls and blank for outbound calls.
  - **Escalation Status** -this column indicates the status of the survey: Green =survey is active, Yellow= survey is close to its end date, Red = survey is closed.
  - **Enumerator Name**- this column is auto-populated for inbound calls and blank for outbound calls.
  - **Call Duration**-displays the total time of the engagement.
  - **Engagement Date** – displays the date of the engagement.
  - **Direction** – displays inbound or outbound.
  - **Call Outcome** – for outbound calls, this displays the call outcome.
  - **Recording** – click on this column to listen to the recording.
  - **Assessment** – click on this column to complete the assessment questionnaire. (The recording is also accessible from within the assessment).

- **Assessment Status** – this column displays incomplete/complete depending on whether an assessment has been completed.
- **Respondent Number**- this column displays the respondent's phone number.

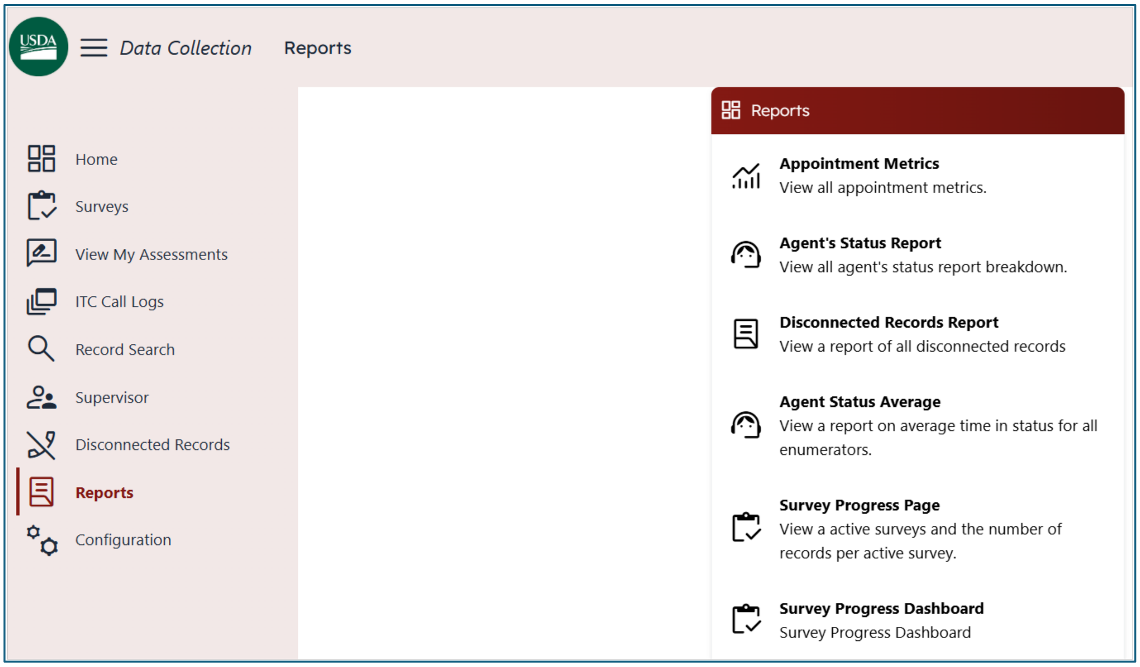
ii. Agent Status

The Agent status listing shows all enumerators and their current status. Users can display enumerators doing inbound calls or outbound calls. Status options include Occupied (currently on a call), Ready, Not Ready, Offline and Forced (the system forced the status to 'offline').



E. Side Menu – Reports

The Reports section of the side menu has several canned reports available.



- **Appointment Metrics** -a report of records that have appointments, their time and status. The default is to show appointments for the last 30 days, but users can adjust that as needed.
- **Agent's Status Report**-gives metrics by enumerator for their ready, not ready, occupied, online and offline durations.
- **Disconnected Records Report**- provides a list of disconnected records and their outcomes after lookup. (*Still under construction*)
- **Agent Status Average**-provides metrics on the average time an enumerator is in each status. (*Still under construction*)
- **Survey Progress Page**- provides a report of the total number of records and the number remaining for all active surveys.
- **Survey Progress Dashboard**- provides various graphic illustrations of survey progress. Users can select specific surveys to display.