

National Core Indicators (NCI) ODESA Manual

For Users

2026

Website: <https://odesa.nationalcoreindicators.org>

Version History

Version	Date	Author	Description of Changes
1.0	8/25/25	Jared Lestik	Initial release
1.1	12/8/25	Jared Lestik	Version history added. Added note regarding scroll wheel to Data Entry section.
1.2	5/12/26	Jared Lestik	Added instructions for Pennsylvania surveys and Session Timeout details
1.3	7/27/2026	Jared Lestik	Added Survey Cycle selector functionality, My Profile page, mobile MFA code delivery, and expanded glossary

NCI ODESA Manual

For Users

2026

Introduction

The Online Data Entry Survey Application (ODESA) is a web-based platform that all participating National Core Indicators (NCI) states use to enter survey data for the following survey types:

- NCI Intellectual and Developmental Disabilities (NCI-IDDD)
 - In-Person Survey (IPS)
 - Adult Family Survey (AFS)
 - Child Family Survey (CFS)
 - Family/Guardian Survey (FGS)
- NCI for Aging and Disabilities (NCI-AD)
 - Adult Consumer Survey (ACS)

Every year, ODESA is updated to reflect the current year's survey tools. The ODESA application resides on a secure server and requires unique login information for each user.

ODESA contains built-in logic checks and skip patterns to standardize data entry. In addition to its data entry functions, the system includes administrative features to allow states to manage users and groups, track progress, and download the state's survey data.

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Glossary

Authenticated User: a user who has a username and password to log into the ODESA application and can access system functionality.

Bulk Assignment: administrators can assign multiple surveys to a user at one time.

Client: the state using the ODESA system.

Data Entry: a term used to describe the process of filling out surveys in the ODESA application.

Data Export: administrators can export survey data to a CSV file or Tab-delimited text file.

Direct Entry: guest users use a provided survey code to enter survey answers directly into the ODESA application.

Group: users are assigned to one or multiple Groups to limit access to the appropriate surveys for their tasks, ensuring the user does not make unintended changes to surveys outside of their Group(s). Note: California is a unique case, as it uses Groups to identify Regional Centers.

Guest User: a user who is provided with a survey code sent by postal mail; only able to access the specific survey and not the rest of the system. Applies only to Family Surveys. Survey code mailings may also include paper copies of the survey tool, which are available in multiple languages based that vary by state.

Logic Check: a feature on certain survey questions that ensures data is collected accurately, such as disabling a survey section based on a qualifying question.

Multi-Factor Authentication (MFA) (also referred to as two-factor authentication): as an added security measure, in order to log into ODESA, a user will first be sent a one-time code to the email address associated with their ODESA account. The user must enter this code to verify they are the owner of the account. Users can also have MFA codes sent to their mobile device by adding their phone number to the My Profile page.

Navigation Panel: the green panel on the left side of the screen in the ODESA application where users can navigate to different portions of the application.

Offline Mode: ODESA will automatically switch to Offline Mode when internet service is unavailable or unstable. Answers to survey question will be saved locally until internet service is restored, after which they will be saved to the application servers.

Reports: administrators can run a variety of reports to analyze survey data using various metrics.

Session Timeout: after 24 hours of inactivity in the ODESA application, a user will automatically be logged out. Any survey answers entered prior to the timeout will be saved.

Skip Pattern: some question options may enable or disable follow-up questions when selected; often these options will have “Go to” statements, such as “Go to Q23”.

Survey Code: a survey's unique identifier, must be 4-8 characters, containing only letters, numbers, dashes (-), or underscores (_).

Survey Cycle: the time period for which survey data is being collected; will always span from one year to the next, e.g., 2026-27.

Survey Cycle Selector: this feature allows users to switch between the current and previous survey cycle using the dropdown in the navigation panel. Only these two cycles are accessible, older cycles become unavailable when a new cycle starts.

Survey Grid: the table displaying surveys specific to a survey type, e.g., ACS, IPS, etc., that is accessed by selecting a survey type from the navigation panel.

Survey Tool: the paper copy of the online survey that is mailed to individuals, who can fill out the paper copy and return it by mail, or use an included QR code (where applicable) to access the survey in the ODESA application.

Survey Type: the type of survey being conducted; includes Adult Consumer, In-Person, Adult Family, Family/Guardian, and Child Family Surveys. Pennsylvania users may also see four additional survey types: Family/Friend/Guardian, IM4Q Pre-survey, State Center Supplement, and Time Spent.

UTC (Coordinated Universal Time): the primary global time standard used to regulate clocks and time. All dates and times in ODESA are recorded in UTC.

Additional Information

Data from all NCI Surveys (Adult Consumer, In-Person, Adult Family, Family/Guardian, and Child Family) can be entered on the same secure site: <https://ODESA.nationalcoreindicators.org>

For ease of use, sections can be navigated to directly via the Table of Contents by holding the Ctrl button and clicking on the desired section title.

Accessibility: the ODESA system does not currently have a zoom feature for increasing the text size, but this can be done in your browser settings or by holding Ctrl and scrolling with your mouse wheel.

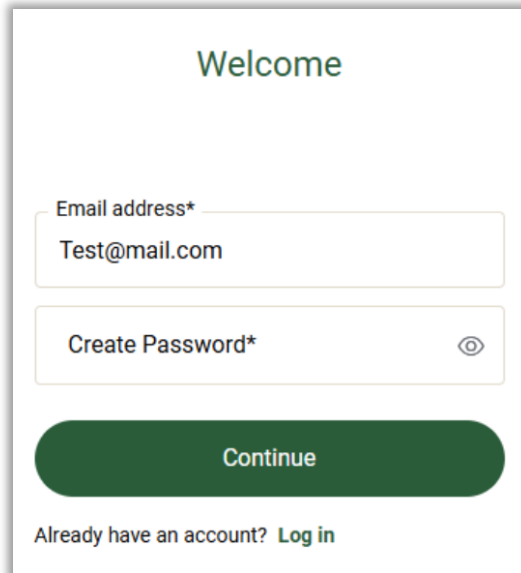
All dates and times recorded in ODESA data collection are in Coordinated Universal Time (UTC).

Getting Started

Accessibility: the ODESA system does not currently have a zoom feature for increasing the text size, but this can be done in your browser settings or by holding Ctrl and scrolling with your mouse wheel.

Account Activation

If you are a new user, account information will be generated by the system and sent to you via email. The email will include a link to complete your account registration. Your username is your email address, and you will need to create a new password in the “Create Password” box. Selecting the “Create Password” box will show the requirements you must follow when creating your password.

A screenshot of a web form titled "Welcome" in green text. Below the title, there are two input fields. The first is labeled "Email address*" and contains the text "Test@mail.com". The second is labeled "Create Password*" and has a small eye icon to its right. Below these fields is a large green button with the text "Continue". At the bottom of the form, there is a link that says "Already have an account? Log in".

Welcome

Email address*

Test@mail.com

Create Password*

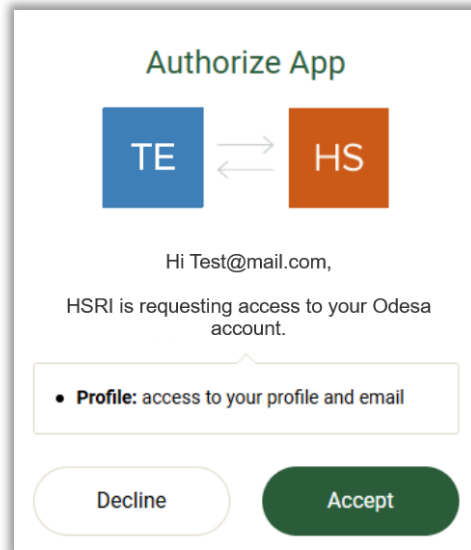
Continue

Already have an account? [Log in](#)

Your password must contain:

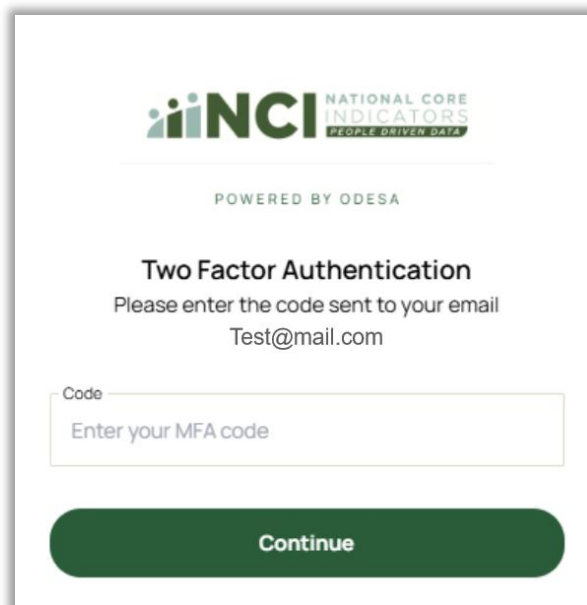
- At least 8 characters
- At least 3 of the following:
 - Lower case letters (a-z)
 - Upper case letters (A-Z)
 - Numbers (0-9)
 - Special characters (e.g. !@#\$%^&*)

After successfully creating a new password, you will receive a series of prompts. First, you must authorize HSRI to have access to your ODESA account.

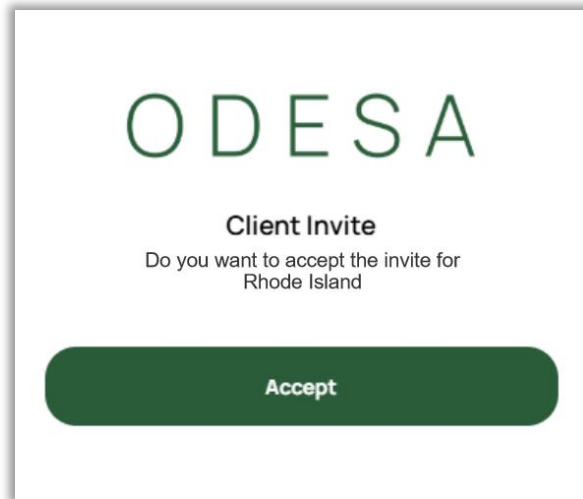


Next, you will be sent via email a two-factor authentication email with a four-digit code, and you must enter it to verify your account. The email will be sent to the same address where your invitation link was sent. ODESA also offers the ability to receive authentication codes via SMS text message by setting a phone number in the “My Profile” page. This is covered in more detail later in this document.

Please note: every time you log into ODESA in the future, you will be sent another code and must enter it to proceed. If you do not see the MFA code email in your inbox, be sure to check your spam/junk folder before submitting a support ticket.



Lastly, you will be prompted to accept the client invitation for the state to which you have been assigned.



Once these prompts have been completed, you will arrive at the ODESA home page.

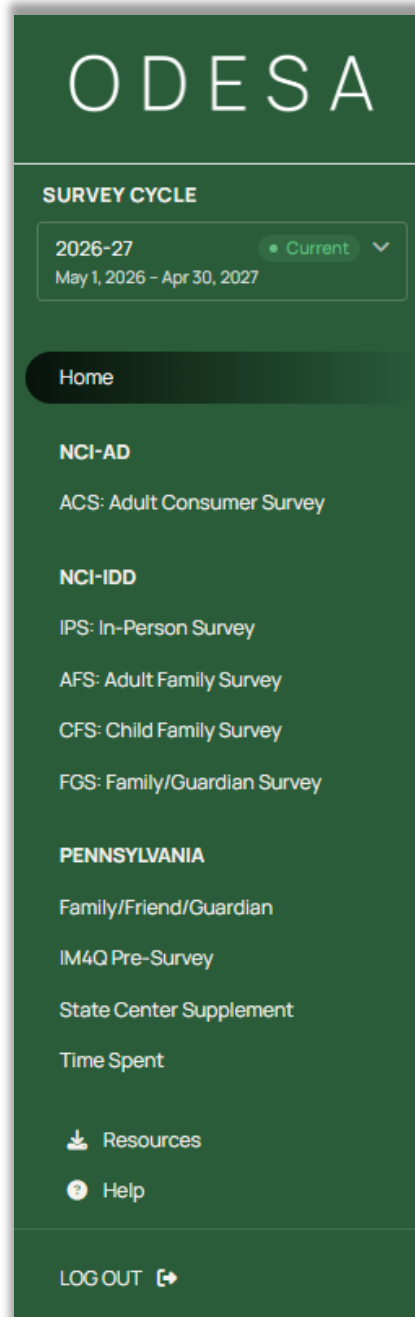
Please note: it is possible for unauthenticated users to access the Family Surveys directly without going through this process. This is called "Direct Entry." Those unauthenticated users ("guest users") can enter their survey data into the Family Surveys via a direct survey link and entering a survey code. See "Direct Entry" section later in this manual.

Home Screen for Users

The Home Screen will display a welcome screen for the user, along with a navigation panel on the left-hand side. Depending on the surveys to which the user has been assigned, this panel will display one or more of the following options:

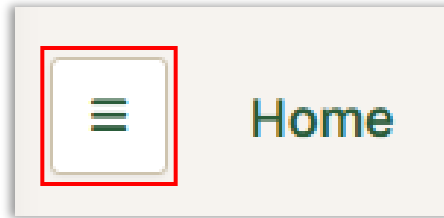
1. Survey Cycle
 - Users can switch between the current survey cycle and past cycles using this control.
2. NCI-AD
 - ACS: Adult Consumer Survey – access the list of Adult Consumer Surveys assigned to the logged in user.
3. NCI-IDD – each survey type link provides access the list of surveys assigned to the logged in user.
 - IPS: In-Person Survey
 - AFS: Adult Family Survey
 - CFS: Child Family Survey
 - FGS: Family/Guardian Survey
4. Pennsylvania – if logged in as a User for the state of Pennsylvania, additional surveys may be accessible in the navigation panel.
 - Family/Friend/Guardian

- IM4Q Pre-Survey
 - State Center Supplement
 - Time Spent
5. My Profile – allows users to change their first and/or last names, as well as add a phone number to receive two-factor authentication codes via SMS text messages
 6. Resources – access resources such as user manuals and training materials
 7. Help – access help files



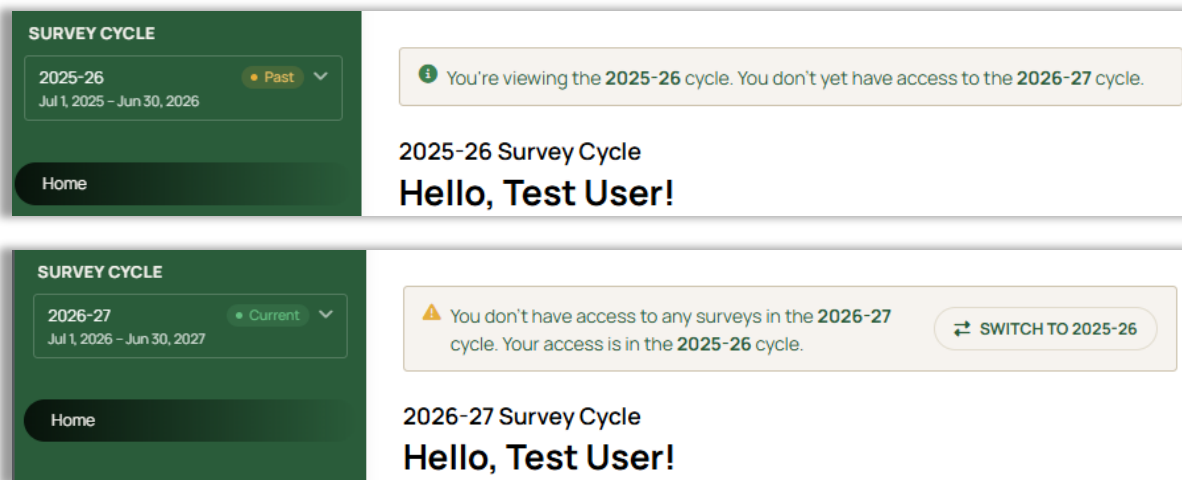
The side navigation panel is also collapsible, allowing for more screen space to view the survey grids and other pages. Simply click the arrow icon (<) at the top of the panel to hide it, and click the menu icon to show it again.



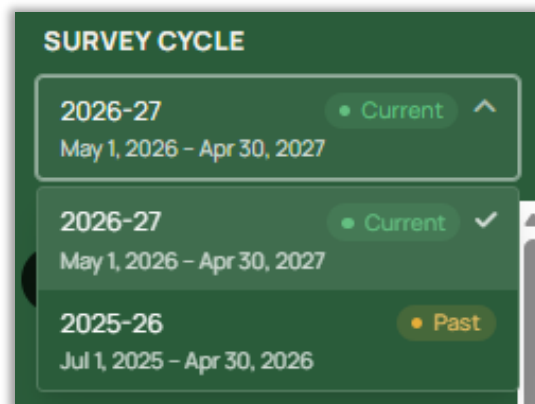


Survey Cycle Selector

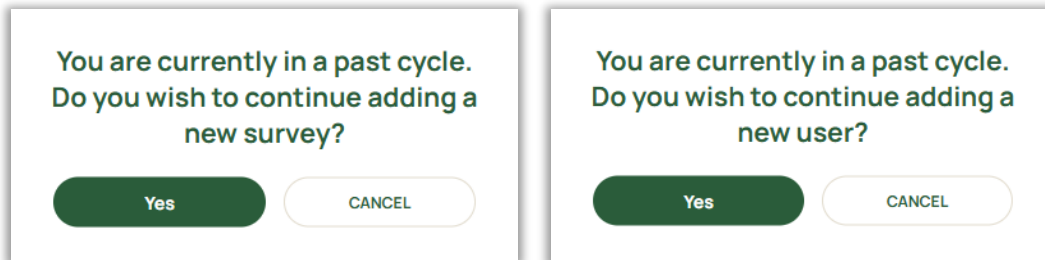
Using the dropdown menu under “Survey Cycle” in the lefthand panel, users can switch between the current survey cycle and previous cycle. When first logging in, the most recent cycle a user has access to will be selected by default. A message will be displayed stating which cycle is currently active for the user and whether they have access to other cycles



Selecting the dropdown menu will show a list of the current and previous cycle. Note: if you are on one of the survey grid pages, changing the survey cycle will return you to the home screen.



A warning will be displayed if an attempt is made to add, edit, or delete surveys in a past cycle. **After a survey cycle has been completed for your state, any changes to data from a past cycle should be made with extreme caution to avoid affecting metrics already being used by states. If you are unsure whether data from a past survey cycle can be modified, please consult your State Client Administrator or the NCI team before making any changes.**



Survey Grids

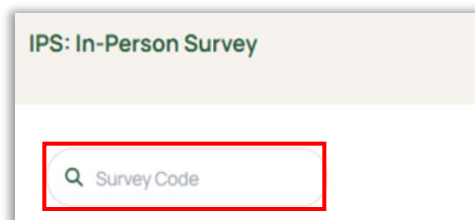
If a user clicks on a survey type in the lefthand panel, they will access the “Survey Grid” for that survey. Each survey grid displays the list of surveys that have been entered or pre-loaded into the system. From these pages, users can access surveys that have been assigned to them.

Search, Sort, and Filter

The Search, Sort, and Filter features are available in each of the survey grids under NCI-AD and NCI-IDD.

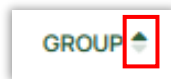
Search

A Search field is available for queries and can be used in conjunction with sorting option. The Search function allows you to search for specific survey codes. Simply enter text in the search field and the table will be automatically filtered to surveys which include that text in the survey code.



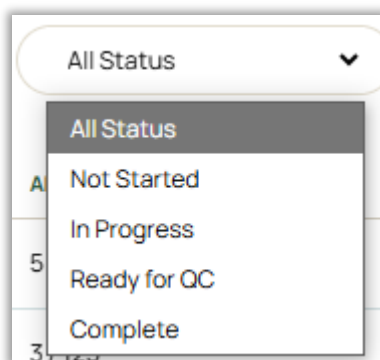
Sort

You may sort by any category displayed in a survey list by clicking the column header. Sorting is alphabetical and can be either ascending or descending, as indicated by the arrow icons next to the column header.



Filter

A user can filter their assigned surveys by status, which includes Not Started, In Progress, Ready for QC, and Completed.



Survey Grid

Each Survey Grid provides a list of surveys that have been entered into the system. The Survey Grid defaults to showing surveys by Last Modified, beginning with the most recently modified survey; however, you can sort the list by any column. (If no surveys have been entered or pre-loaded, the screen will read "No results found").

The information contained in the Survey Grids for the IPS and ACS is summarized by column in the table below.

Survey Grids for the IPS and ACS

Group	The group to which the survey is assigned. States will each have a unique list of groups. If no groups are assigned, this column will be blank.
Code	The unique survey code assigned to the survey.
Assigned To	The user/administrator assigned to conduct the survey and/or enter data into the survey.
Reason if not Surveyed	Displays the selected reason if the survey was not scheduled or was scheduled but not conducted. Reason is selected in Survey Status section, question SC-3 (ACS)/SC-4 (IPS).
Status	The current status of the survey. Options are Not Started, In Progress, Ready for QC (if applicable), or Completed.

Answers	The number of questions answered.
Interview	The date the survey was conducted. Please Note: "Interview Date" is an optional field that is manually entered and shown on the survey grid. For the IPS and ACS, when a surveyor completes the survey and adds a date to the surveyor feedback question in the survey itself, it overwrites the interview date that was added in the "add survey screen" and the interview date added in the survey itself will show on the grid. The interview date that shows on the grid can be changed in the "edit survey" screen, even after you've added the date in the surveyor feedback section.
Added By	The user/administrator who created the survey.
Added	The date the survey was added to the system.
Background Completed By	The user/administrator who entered Background Information and marked the section complete.
Background Completed	The date the Background Information section was marked complete.
Survey Completed By	The user/administrator who completed the survey.
Survey Complete	The date the survey was marked complete.
Modified By	The user/administrator who last made changes to the survey.
Modified	The date the survey was last modified.

The information contained in the Survey Grids for the AFS, CFS, and FGS is summarized by column in the table below.

Survey Grids for the AFS, CFS, and FGS

Group	The group to which the survey is assigned. States will each have a unique list of groups. If no groups are assigned, this column will be blank.
Code	The unique survey code assigned to the survey.

Assigned To	The Direct Entry user invited to complete a survey or a user/administrator assigned to enter data into the survey from the mailed-in paper tool.
Status	The current status of the survey. Options are Not Started, In Progress, Ready for QC (if applicable), or Completed.
Answers	The number of questions answered.
Language	The language of the mailed paper survey tool. Available languages may vary by state.
Added By	The user/administrator who created the survey.
Added	The date the survey was added to the system.
Survey Completed By	The user/administrator who completed the survey. Note: if this column contains “Guest User”, that indicates the date the user last made changes via Direct Entry.
Survey Complete	The date the survey was marked complete.
Modified By	The user/administrator who last made changes to the survey. Note: for Family Surveys (AFS, CFS, FGS), if this column contains “Guest User”, that indicates it has been completed via direct entry.
Modified	The date the survey was last modified.

Survey Grids for the Pennsylvania Surveys

The information contained in the Survey Grids for the Pennsylvania surveys is summarized by column in the table below.

Administrative Entity	The Administrative Entity to which the survey is assigned. States will each have a unique list of Administrative Entities.
Consumer ID	The unique Consumer ID assigned to the survey.
MCI #	
Assigned To	The user/administrator assigned to conduct the survey and/or enter data into the survey.
Status	The current status of the survey. Options are Not Started, In Progress, Ready for QC (if applicable), or Completed.

Answers	The number of questions answered.
Language	The language in which the survey was conducted.
Added By	The user/administrator who created the survey.
Added	The date the survey was added to the system.
Survey Completed By	The user/administrator who completed the survey.
Survey Complete	The date the survey was marked complete.
Modified By	The user/administrator who last made changes to the survey.
Modified	The date the survey was last modified.

Creating a New Survey

To enter a new survey, be sure that you are in the correct survey grid (for example, if you want to add an Adult Family Survey, be sure you are in the Adult Family Survey grid) and select the Add Survey button located above the list of surveys.

The screenshot shows the 'AFS: Adult Family Survey' interface. At the top, there is a search bar labeled 'Survey Code'. To the right of the search bar are three buttons: '+ ADD SURVEY' (highlighted with a red box), 'ASSIGN SURVEYS', and 'EXPORT'. Below these buttons are four filter dropdowns: 'All Groups', 'All Assignees', 'All Status', and 'Date Finished'. The main part of the interface is a table with the following columns: 'GROUP', 'CODE', 'ASSIGNED TO', 'STATUS', 'ANSWERS', 'LANGUAGE', 'ADDED BY', 'ADDED', and 'SURVEY COMPLETED BY'. The table contains five rows of survey data. The first three rows have a green checkmark in the 'GROUP' column, and the last two rows have an empty checkbox. The 'ANSWERS' column shows values 91, 0, 0, 0, and 0. The 'ADDED' column shows dates: 02/16/2026, 02/17/2026, 02/16/2026, 02/16/2026, and 02/16/2026.

GROUP	CODE	ASSIGNED TO	STATUS	ANSWERS	LANGUAGE	ADDED BY	ADDED	SURVEY COMPLETED BY
☒ Default AFS: Adult F...	A1001	Jared Lestik	In Progress	91		Jared Lestik	02/16/2026	
☒ Default AFS: Adult F...	AZtest23	Jared Lestik	Not Started	0	English	Jared Lestik	02/17/2026	
☒ Default AFS: Adult F...	A1002	Jared Lestik	Not Started	0		Jared Lestik	02/16/2026	
☐ Default AFS: Adult F...	A1003	Jared Lestik	Not Started	0		Jared Lestik	02/16/2026	
☐ Default AFS: Adult F...	A1004	Jared Lestik	Not Started	0		Jared Lestik	02/16/2026	

A new screen will appear where survey information can be entered. Elements marked with an asterisk are required.

Survey Code must be 4-8 characters, only letters, numbers, dashes (-), or underscores (_).

The Add Survey screen will contain different options depending on the type of survey being created, as shown in the following examples.

Family Surveys

Add Survey - AFS: Adult Family Survey

Group*

Select Group ▼

Survey Code*

Region (ACS only)

Assigned User

▼

Language

Select Language ▼

Save

CANCEL

In-Person Survey/Adult Consumer Survey

Add Survey - IPS: In-Person Survey

Group*

Select Group ▼

Survey Code*

Region (ACS only)

Assigned User

▼

Language

Select Language ▼

Interview Date

mm/dd/yyyy 

Save

CANCEL

Please Note: “Interview Date” is an optional field that is manually entered and shown on the survey grid for the IPS and ACS only. When a surveyor completes the survey and adds a date to the surveyor feedback question in the survey itself, it overwrites the interview date that was added in the “add survey screen” and the interview date added in the survey itself will show on the grid.

The Interview Date that shows in the survey grid can be changed in the “Edit Survey” screen, even after you've added the date in the Surveyor Feedback section.

Pennsylvania-Specific Surveys

The screenshot shows a form titled "Add Survey - Family/Friend/Guardian". It contains several input fields: "Administrative Entity*" with a dropdown menu showing "Select AE"; "Consumer ID*" and "MCI #*" as text input fields; "Region (ACS only)" as a text input field; "Assigned User" with a dropdown menu; and "Language" with a dropdown menu showing "Select Language". At the bottom, there are two buttons: a green "Save" button and a white "CANCEL" button.

Once a survey is created and the “Save” button is selected, the user will be brought back to the survey grid. The user must then find the survey in the grid and open the survey to begin data entry.

Editing an Existing Survey

The survey code and other information about the survey may be edited by selecting “Edit Survey Details” after clicking the three dots for the survey that is being edited.

The screenshot shows a table with columns: CLIENT, GROUP, and CODE. There are three rows of survey data. A context menu is open over the second row, showing two options: "Open Survey" and "Edit Survey Details". The "Edit Survey Details" option is highlighted with a red box.

	CLIENT	GROUP	CODE
☐	RI	Default AFS: Adult	jlestik_AFS_052125
☐	RI	Default AFS: Adult	direct1
☐	RI	Default AFS: Adult	jlestik_AFS_051525

Clicking on this icon will display the Edit Survey page to change the Survey Code or other survey information. Surveys can also be assigned/reassigned to a user on this page, and the interview date can be added. Elements marked with an asterisk are required.

Edit Survey

Group*

Default AFS: Adult Family Survey Group

Survey Code*

Test

Region (ACS only)

Assigned User

Jared Lestik

Language

English

Save

CANCEL

⌵ DELETE SURVEY

Deleting a Survey

An existing survey can be deleted by first clicking the three dots and selecting “Edit Survey Details” for the survey in question, then selecting the Delete Survey button below the Save and Cancel buttons.

Edit Survey

Group*

Default AFS: Adult Family Survey Group

Survey Code*

Test

Region (ACS only)

Assigned User

Jared Lestik

Language

English

Save

CANCEL

⌛ DELETE SURVEY

A popup will appear asking you to confirm or cancel deletion of the survey. Selecting Yes will permanently delete the survey, while selecting Cancel will return you to the Edit Survey page.

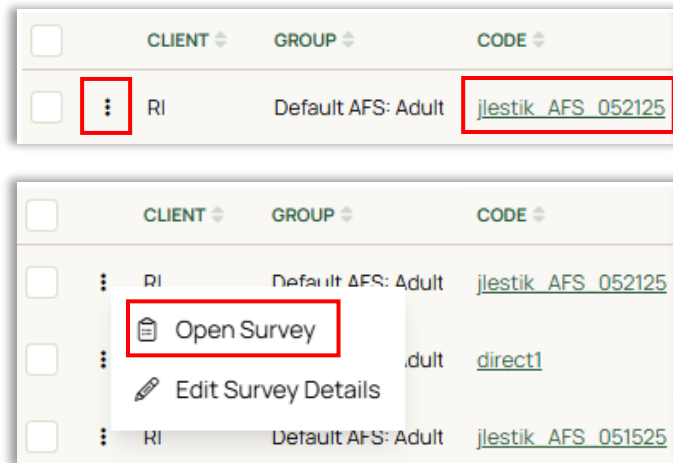
You are about to delete this survey.
Do you wish to continue?

Yes

CANCEL

Data Entry

To enter data into an existing survey, click on the survey code or select the three dots to the left of the Client column and select "Open Survey". This will navigate to where data entry can be performed.



Navigating the Survey

In the data entry portion of ODESA, you can move through the sections of a survey by using navigation buttons or by clicking the link to a desired section in the Table of Contents (TOC) located at the left-hand side of the screen. The following navigation prompts can be found on the data entry screen:

- **< PREVIOUS:** Moves to the preceding page in the survey. Data will automatically save when moving between pages.
- **CONTINUE >:** Moves to the following page. Data will automatically save when moving between pages.
- **SAVE:** Stores all entered data on the current page. Note that data is automatically saved when navigating between pages and when the Mark Survey Completed button is used. Use the Save button before closing the survey, or if you need to pause data entry or step away for a moment.
- **CLOSE (X button):** Closes the survey and brings you back to the Survey Type Page. To save the data on the page, press the Save button before using the Close button.
- **MARK BACKGROUND COMPLETE:** This will mark the Pre-Survey and Background Information sections as completed. The button is present on all pages in the Pre-Survey and Background Information sections. This is only present in the Background Information Section of IPS and ACS.
- **MARK SURVEY COMPLETE:** Marks the survey as finished and brings you back to the Survey Grid Page for the survey you were completing. **You will be asked to confirm that the survey is complete before returning to the list of surveys.** This is only present in Section I and Section II of the IPS and in the Survey portion of the ACS. Family Surveys also have this button on all pages of the survey, except in the case of Direct Entry, where it is only present on the final page.

NOTE: When moving through pages in the survey, do not use the back or forward buttons in the browser and only use the “previous” or “continue” buttons within the survey.

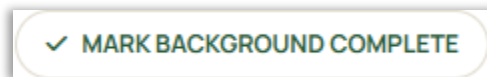
Mark or Unmark Surveys as Completed

When finished with a survey, it should be marked as completed. To do so, select the Mark Survey Completed button in the upper right corner of the survey screen. When a survey is marked as completed, it becomes read-only and cannot be edited. For a survey that has already been marked as completed, this button changes to Unmark Survey Completed and allows for further editing when selected.



Please note: for guest users performing Direct Entry (Family Surveys only), this button will only appear on the final page of the survey (Community Resource Links).

In addition, the Background Information section(s) (IPS and ACS only) must be marked as complete using the Mark Background Complete button, located in the same space as the Mark Survey Completed button in the Background Information section.



This button will not change after being selected, and edits can still be made provided the survey is not marked as completed.

Data Accuracy

ODESA incorporates logic checks and validation messages within the surveys to help ensure data accuracy.

Survey Section Accessibility

For the Adult Family Survey, Child Family Survey, and Family/Guardian Survey, the first question (Question A) asks whether the person receiving services lives at home. This serves as a logic check for entering data in the proper survey.

The page displays a note directing you to go to the end of the survey and mark it as complete if a particular option is selected. This note will indicate which option disables the remainder of the survey.

PART 1: INFORMATION ABOUT YOUR FAMILY • LIVING SITUATION (A)

✓ MARK SURVEY COMPLETED

Please answer the following questions about your family member with a disability who is receiving services.

The remainder of this survey will use "your family member" to refer to your family member with a disability who is receiving services.

A.

Does your family member live at home with you?

SELECT ONE

☐ 1 No

☐ 2 Yes

Note: If your answer is "no" to Question A, go to the end of the survey and mark it complete.

← Previous

Continue →

Note: the remainder of the survey is disabled until the appropriate answer to continue the survey is selected. Disabled sections will be grayed out (shown below) and are not selectable.

AFS: Adult Family Survey

Survey Code

jlestik_041025

PART 2: QUESTIONS ABOUT SERVICES AND SUPPORTS

Information and Planning (1 - 3)

Information and Planning (4 - 7)

Information and Planning (8 - 13)

Information and Planning (14 - 17)

Access and Delivery of Supports (18 - 21)

For the In-Person Survey, there is a Proxy Determination section that determines whether the person entering survey data can do so on their own, or if they need a proxy to assist with answering questions. Section I is only enabled if the user is able to answer questions on their own. Section II can be answered by the user or a proxy individual.

D-5

Will you conduct the Section I with person receiving services? REMINDER: Section I may be completed with the support of an interpreter. The person is not required to answer *all Section I questions*.

SELECT ONE

☐ 2 Yes, will conduct Section I

☐ 1 No, Section I will not be conducted (only Section II will be completed with a proxy respondent) (selecting this option will deactivate Section I)

The Adult Consumer Survey also has a Proxy Determination section that determines which sections of the survey will be accessible. Selecting “Full Version” enables the Consumer Survey section, which includes questions which must be answered by the user directly. Selecting “Proxy Version” enables the Proxy Version section, where all questions can be answered by a proxy.

D-5

Will you conduct the Full or Proxy Version of the survey? REMINDER: the Full version may be completed with the support of an interpreter. Some questions in the full version may be answered by a proxy respondent.

SELECT ONE

☐ 2 FULL VERSION

☐ 0 PROXY VERSION

Logic Checks

In all surveys, certain question options may disable one or more options in subsequent questions. This is done so options that conflict with previous answers cannot be selected. In the example below, a user cannot select the “Does not apply” option because it contradicts the answer to the previous question.

8

Does your child have a service plan?

☐ Does your family have a list of services their case manager/support coordinator will help get? Note: This plan would be in addition to a special education plan, IEP, or Section 504 plan.

SELECT ONE

☒ 2 Yes

☐ 1 No → Go to Q14

☐ 99 Don't know → Go to Q14

If your child has a service plan, please answer Questions 9 – 13. If not, skip to Question 14.

9

Does the plan include all the services and supports your child needs?

SELECT ONE

☐ 2 Yes

☐ 1 No

☐ 99 Don't know

☐ 98 Does not apply - child does not have a service plan

Offline Mode

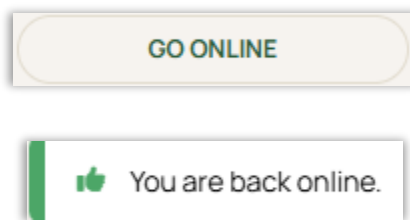
If the user is experiencing issues with internet connectivity when completing a survey, such as Wi-fi instability, Offline Mode (located at the top left of each page of each survey) can be toggled on to save the data locally and then upload it once connectivity is restored. The “Go Offline” button can be found at the bottom of the lefthand navigation panel when editing a survey. A message will be displayed at the top of the screen confirming offline mode is active.

GO OFFLINE

 You are currently offline. Your changes will be saved locally.

The ODESA system will also automatically detect an unstable internet connection and switch to Offline Mode so no data is lost. If working in Offline Mode, the user must not delete their cache or history before syncing with the server.

When ready to reconnect and upload any changes made to the survey, the same button as above will now say “Go Online”. Select this and a message will be displayed stating that online mode has been restored and data has been synced with the server.



Offline Mode FAQ:

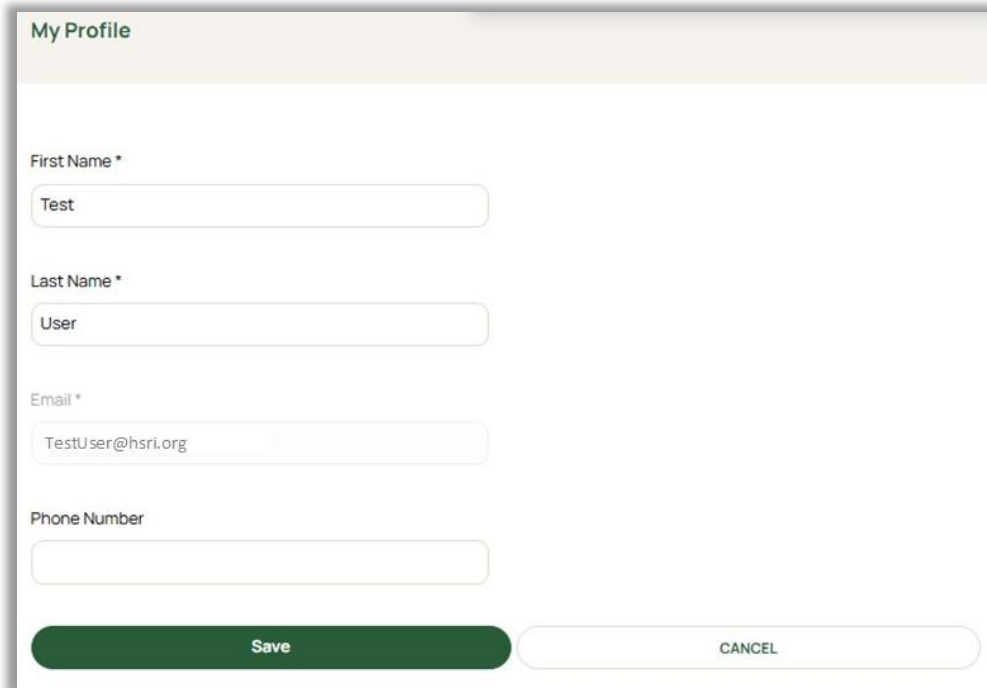
- Will ODESA save the data in a survey if you return to the survey grid while in offline mode? For instance, could you make edits to multiple surveys while in offline mode, then have them all sync when going back online?
 - **Each survey needs to be opened in a separate tab before going offline. You cannot load the survey grids in offline mode.**
- Is ODESA able to be opened while offline, or do you still need an internet connection to initially load the page and login?
 - **You need a connection to log in and access any standard areas of the app. Offline mode only applies to the survey template itself.**
- If ODESA switches to offline mode automatically due to an unstable connection, will it automatically switch back online when a stable connection is detected, or does this need to be done manually?
 - **It will need to be switched back manually.**

Session Timeout

When logged into the ODESA system, the time spent logged in is referred to as a session. A session will expire, or time out, after 24 hours, and the user will be logged out. If the user attempts to continue an open survey after the session has timed out, the system will automatically redirect the user to the login page. Any answers entered prior to the session timeout will be saved.

My Profile

Selecting “My Profile” in the lefthand panel will open the page seen below. Users can edit their first and last names here, as well as add a phone number to receive multi-factor authentication (MFA) codes via mobile device. The email address cannot be changed, as it is the unique identifier for the ODESA account.

A screenshot of a 'My Profile' form. The form has a title bar at the top. Below the title bar, there are four input fields: 'First Name *' with the value 'Test', 'Last Name *' with the value 'User', 'Email *' with the value 'TestUser@hsri.org', and 'Phone Number' which is empty. At the bottom of the form, there are two buttons: a green 'Save' button and a white 'CANCEL' button with a green border.

Once a phone number is saved to the profile, upon the next login, the system will prompt the user to select whether they would like the authentication code to be sent via email or SMS text message.

Resources

The Resources page provides helpful links and downloadable documentation. This admin manual and the manual for basic users are available for download here. For assistance with using these documents, or for other general knowledge questions, please contact Dorothy Hiersteiner (IDD) at dhiersteiner@hsri.org or Stephanie Giordano (AD) at sgjordano@hsri.org. If assistance is needed regarding state-specific topics, please contact your state's IDD or AD representative.

Help

For questions or technical assistance, please contact the ODESA support team at OdesaSupport@hsri.org. Your state's ODESA contact information will also be listed on this page.