

# National Core Indicators (NCI) ODESA Manual

**For Administrators**

2026

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

## *Version History*

| <b>Version</b> | <b>Date</b> | <b>Author</b> | <b>Description of Changes</b>                                                                                                                                        |
|----------------|-------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.0            | 8/25/25     | Jared Lestik  | Initial release                                                                                                                                                      |
| 1.1            | 12/8/25     | Jared Lestik  | Version history added                                                                                                                                                |
| 1.2            | 5/12/26     | Jared Lestik  | Added/updated instructions for data export functionality, session timeout, reporting functionality, offline mode, Direct Entry code uploads, and ACS BI Bulk Uploads |
| 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 Administrators

2025

## 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-IDD)
  - 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.

## Table of Contents (Ctrl+click to navigate directly to section)

|                                                           |                                     |
|-----------------------------------------------------------|-------------------------------------|
| Introduction .....                                        | 3                                   |
| Access to the Application by User Type .....              | 6                                   |
| Client Administrator (Client Admin) .....                 | 6                                   |
| Group Administrator (Group Admin) .....                   | 6                                   |
| User .....                                                | 6                                   |
| Additional Information .....                              | 6                                   |
| Glossary .....                                            | 7                                   |
| Getting Started .....                                     | 8                                   |
| Account Activation .....                                  | 8                                   |
| Client Admin Managing Multiple States.....                | 11                                  |
| Home Screen for Admins .....                              | 11                                  |
| All Admins: Survey Cycle Selector .....                   | 14                                  |
| All Admins: Survey Grids .....                            | 15                                  |
| All Admins: Search, Sort, and Filter .....                | 16                                  |
| Search.....                                               | 17                                  |
| Sort.....                                                 | 17                                  |
| Filter .....                                              | 17                                  |
| Survey Grid.....                                          | 18                                  |
| Survey Grids for the IPS and ACS .....                    | 18                                  |
| Survey Grids for the AFS, CFS, and FGS .....              | 19                                  |
| Survey Grids for the AFS, CFS, and FGS .....              | 20                                  |
| Creating a New Survey .....                               | 21                                  |
| Assigning Surveys in Bulk .....                           | 22                                  |
| Navigating the Survey.....                                | 23                                  |
| All Admins: Data Entry .....                              | 25                                  |
| Editing a Survey Code or Customizing Survey Details ..... | 26                                  |
| All Admins: Generate a Survey Data Export .....           | 27                                  |
| Mark or Unmark Surveys as Completed.....                  | 28                                  |
| Ready for QC.....                                         | <b>Error! Bookmark not defined.</b> |
| Delete a Survey .....                                     | 28                                  |
| Data Accuracy.....                                        | 29                                  |

|                                                                                                                    |    |
|--------------------------------------------------------------------------------------------------------------------|----|
| Survey Section Accessibility .....                                                                                 | 29 |
| Logic Checks .....                                                                                                 | 31 |
| Offline Mode .....                                                                                                 | 32 |
| Session Timeout .....                                                                                              | 33 |
| All Admins: Reports.....                                                                                           | 33 |
| All Admins: Administration Pages .....                                                                             | 36 |
| Client Admins: Manage Groups.....                                                                                  | 36 |
| Client Admins: Sorting and Filtering the Manage Groups Table .....                                                 | 37 |
| Client Admins: Adding a New Group.....                                                                             | 38 |
| Client and Group Admins: Manage Users .....                                                                        | 40 |
| All Admins: Sorting and Filtering the Manage User Table.....                                                       | 42 |
| All Admins: Adding a New User.....                                                                                 | 42 |
| All Admins: Editing an Existing User .....                                                                         | 43 |
| All Admins: My Profile .....                                                                                       | 45 |
| All Admins: Resources .....                                                                                        | 46 |
| All Admins: Help .....                                                                                             | 46 |
| Client Admin and/or State Contact: How to Administer Direct<br>Entry for Family Surveys.....                       | 46 |
| Instructions for Sending Direct Entry Survey Codes to HSRI .....                                                   | 47 |
| Direct Entry Access to the Family Surveys.....                                                                     | 47 |
| Client Admin and/or State Contact: How to submit Background<br>Information (BI) Bulk Uploads for ACS and IPS ..... | 48 |
| Client Admin and/or State Contact: How to submit Survey Code<br>Bulk Uploads for IPS and ACS.....                  | 49 |

# Access to the Application by User Type

There are three distinct user types in ODESA: Client Administrator, Group Administrator, and User. Each has a different level of access to survey data, and Administrators have the ability to perform additional functions.

## Client Administrator (Client Admin)

A Client Administrator has access to their state's information, including group/user account maintenance and the survey types to which they have been given access. A Client Administrator also has access to all survey data for assigned groups, which may be all groups in the state, and Client Administrators may add, edit, delete, and track the progress of surveys completed throughout the year. Any Client Administrator can perform the following functions: add and edit users, transfer surveys, mark (or unmark) surveys as completed, and download survey data directly from ODESA.

## Group Administrator (Group Admin)

A Group Administrator has access to users and surveys within one or more groups. A group is a subset of users within a client, which may be used to delineate users by certain criteria, such as particular regions of a state, for example. The use of Groups and Group Administrators is optional.

## User

A User has access to basic data entry functions. Users may be assigned to one or more groups, and users are only able to view survey information they have entered. Certain survey sections may be hidden from users based on permissions set by a Client Admin. A user may also view reports summarizing their completed surveys and download copies of the survey documents. There is a separate ODESA guide for Users.

## 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, any sections in this document that do not pertain to your admin level can be collapsed by clicking the small arrow to the left of the section title. All section titles denote the type of admin to which the section applies, and 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, reporting, and exports are in Coordinated Universal Time (UTC).

## 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.

## Getting Started

### 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.

## 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.

## Authorize App

TE

↔

HS

Hi Test@mail.com,  
HSRI is requesting access to your Odesa account.

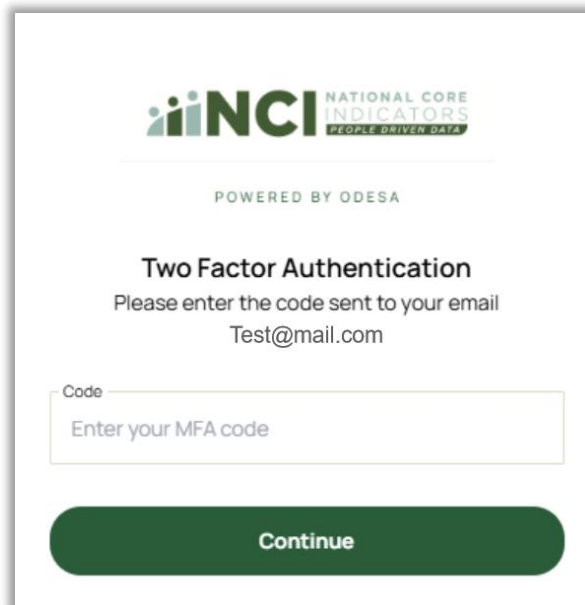
- **Profile:** access to your profile and email

Decline

Accept

Next, you will be sent 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.

A screenshot of a web page for Two Factor Authentication. At the top is the NCI logo with the text 'NATIONAL CORE INDICATORS' and 'PEOPLE DRIVEN DATA'. Below the logo is the text 'POWERED BY ODESA'. The main heading is 'Two Factor Authentication', followed by the instruction 'Please enter the code sent to your email' and the email address 'Test@mail.com'. There is a text input field with a placeholder 'Enter your MFA code' and a green 'Continue' button at the bottom.

**NCI** NATIONAL CORE INDICATORS  
PEOPLE DRIVEN DATA

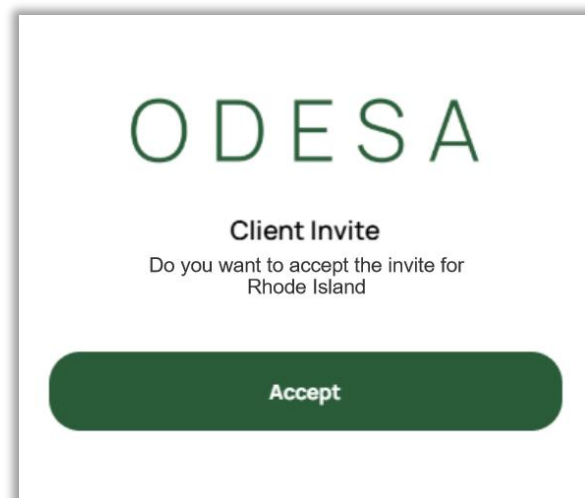
POWERED BY ODESA

**Two Factor Authentication**  
Please enter the code sent to your email  
Test@mail.com

Code  
Enter your MFA code

**Continue**

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

A screenshot of a web page for Client Invite. At the top is the ODESA logo. Below it is the heading 'Client Invite' and the text 'Do you want to accept the invite for Rhode Island'. There is a green 'Accept' button at the bottom.

**ODESA**

**Client Invite**  
Do you want to accept the invite for  
Rhode Island

**Accept**

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 Consumer ID. See “Direct Entry” section later in this manual.

## Client Admin Managing Multiple States

In ODESA 2.0, each user account can be assigned to only **one state**.

If a single individual needs to serve as the **Client Admin for multiple states**, they must create a separate ODESA 2.0 account per each state, using a **unique email address** for each account. This is the **recommended approach** and ensures reliable access across Demo, Staging and Production.

### Workaround Option

As an alternative, some email providers allow the use of “+” in an email address to create variations of the same account (e.g., [user+NY@email.com](mailto:user+NY@email.com), [user+CA@email.com](mailto:user+CA@email.com)).

- This method allows one primary email address to be used for multiple ODESA accounts; each tied to a different state.
- If you use this method, please use the two letter-state initials after the “+” as shown in the example above.
- **Important:** This approach may not work consistently, as functionality depends on the email provider and browser settings. Therefore, the preferred approach is to have unique email addresses.

## Home Screen for Admins

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

1. Survey Cycle
  - Admins can switch between the current survey cycle and past cycles using this control.
2. Reports
  - Admins can access a variety of reports on this page, such as Survey Progress by Month, Survey Status Reports, etc.
3. NCI-AD
  - ACS: Adult Consumer Survey – access the list of Adult Consumer Surveys, including adding, editing, uploading, and exporting functionality, depending on admin role.
4. NCI-IDD (each survey type link provides access to the list of surveys, including adding, editing, uploading, and exporting functionality, depending on admin role.)
  - IPS: In-Person Survey

- AFS: Adult Family Survey
  - CFS: Child Family Survey
  - FGS: Family/Guardian Survey
5. Pennsylvania – if logged in as a Client or Group Admin for the state of Pennsylvania, additional surveys will be accessible in the navigation panel.
    - Family/Friend/Guardian
    - IM4Q Pre-Survey
    - State Center Supplement
    - Time Spent
  6. Manage Groups – view the list of groups, edit group details, and add new groups (Read more under “Administration Pages”; page available to Client Administrators only)
  7. Manage Users – view the list of users, edit user details, and add new users (Read more under “Administration Pages”; page available to Client and Group Administrators)
  8. My Profile – allows admins and 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
  9. Resources – access resources such as user manuals and training materials
  10. Help – See who to contact if you have trouble or questions

# ODESA

## SURVEY CYCLE

2026-27

• Current ▾

May 1, 2026 – Apr 30, 2027

Home

Reports

### NCI-AD

ACS: Adult Consumer Survey

### NCI-IDD

IPS: In-Person Survey

AFS: Adult Family Survey

CFS: Child Family Survey

FGS: Family/Guardian Survey

### PENNSYLVANIA

Family/Friend/Guardian

IM4Q Pre-Survey

State Center Supplement

Time Spent

 Manage Groups

 Manage Users

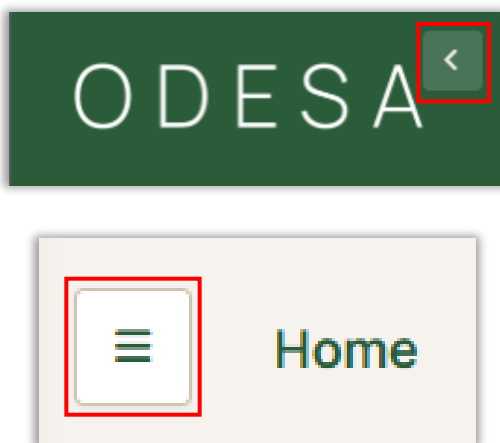
 My Profile

 Resources

 Help

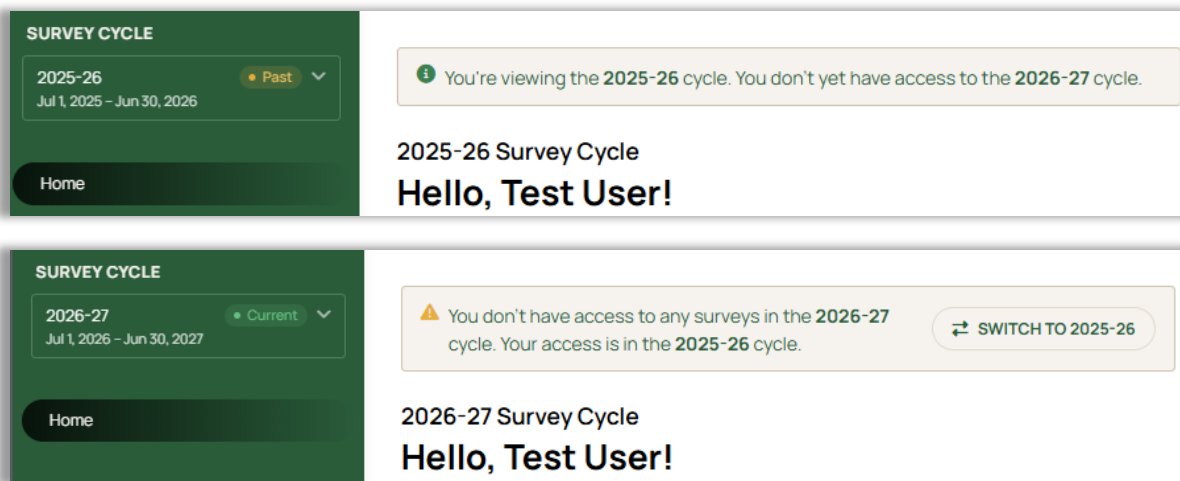
LOG OUT 

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.

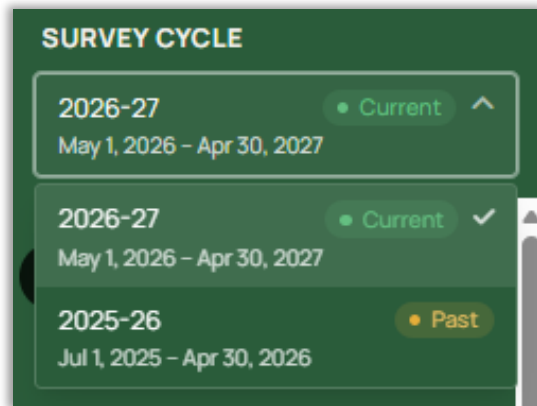


## All Admins: Survey Cycle Selector

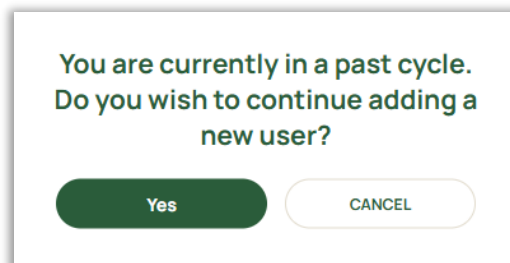
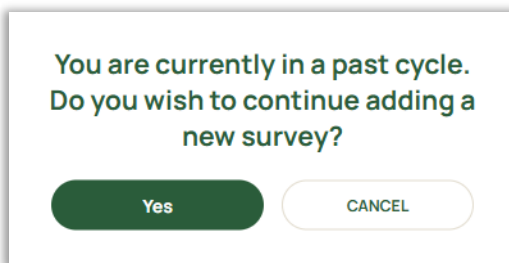
Using the dropdown menu under “Survey Cycle” in the lefthand panel, users can switch between the current survey cycle and previous cycle. When first logging in, the most recent cycle a user has access to will be selected by default. A message will be displayed stating which cycle is currently active 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. It will also appear if attempting to add, edit, or delete Groups or Users. Examples are shown below. **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.**



## All Admins: Survey Grids

If an admin clicks on a survey type along the side panel, they will access the “Survey Grid” for that survey. Each survey grid displays the list of survey that have been entered or pre-loaded into the system. From the Survey Grid, surveys can be added, edited, assigned, or deleted. Surveys can be added by selecting the Add Survey button. Data Export of all surveys entered to date is also available to all admin level accounts by selecting the Export button.

AFS: Adult Family Survey

Survey Code

+ ADD SURVEY

ASSIGN SURVEYS

EXPORT

All Groups

All Assignees

All Status

Date Finished

| <input type="checkbox"/> | GROUP                     | CODE                     | ASSIGNED TO  | STATUS      | ANSWERS | LANGUAGE | ADDED BY         | ADDED      | SURVEY COMPLETED BY |
|--------------------------|---------------------------|--------------------------|--------------|-------------|---------|----------|------------------|------------|---------------------|
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">A1001</a>    | Jared Lestik | In Progress | 91      |          | Jared Lestik     | 02/16/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">AZtest23</a> | Jared Lestik | Not Started | 0       | English  | Jared Lestik     | 02/17/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">A1002</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik     | 02/16/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">A1003</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik     | 02/16/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">A1004</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik     | 02/16/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">A1005</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik     | 02/16/2026 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">AZtest</a>   | Jared Lestik | Complete    | 115     | English  | Jared Lestik     | 01/06/2026 | Jared Lestik        |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">kg092525</a> |              | In Progress | 7       |          | Karen Gruber     | 09/25/2025 |                     |
| <input type="checkbox"/> | : Default AFS: Adult F... | <a href="#">test1</a>    |              | In Progress | 1       |          | Westley Oliveira | 09/10/2025 |                     |

Viewing 1-9 of 9

1

Family/Friend/Guardian

Survey Code

+ ADD SURVEY

ASSIGN SURVEYS

IMPORT

EXPORT

All Clients

All Groups

All Assignees

All Status

Date Finished

| <input type="checkbox"/> | CLIENT | ADMINISTRATIVE ENTITY   | CONSUMER ID | MCI # | ASSIGNED TO         | STATUS      | ANSWERS | LANGUAGE | ADDED BY            | ADDED      | SURVEY COMPLETED BY | SURVEY COMPLETE | MODIFIED BY         | MODIFIED   |
|--------------------------|--------|-------------------------|-------------|-------|---------------------|-------------|---------|----------|---------------------|------------|---------------------|-----------------|---------------------|------------|
| <input type="checkbox"/> | PA     | Test group 1            | 748576      | 02920 | Mary Kay Cunningham | Not Started | 0       | English  | Mary Kay Cunningham | 02/18/2026 |                     |                 | Mary Kay Cunningham | 02/18/2026 |
| <input type="checkbox"/> | PA     | IPS+FG+IMQ              | 2222        | 2121  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/17/2026 |                     |                 | Jackie Moran        | 02/17/2026 |
| <input type="checkbox"/> | PA     | Mixed - Group J2        | 1111        | 3578  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/16/2026 |                     |                 | Jackie Moran        | 02/16/2026 |
| <input type="checkbox"/> | PA     | Mixed - Group J2        | 3256        | 3578  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/16/2026 |                     |                 | Jackie Moran        | 02/16/2026 |
| <input type="checkbox"/> | PA     | Mixed - Group J2        | 3578        | 3256  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/16/2026 |                     |                 | Jackie Moran        | 02/16/2026 |
| <input type="checkbox"/> | PA     | Mixed - Group J3        | 32222       | 3001  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/16/2026 |                     |                 | Jackie Moran        | 02/16/2026 |
| <input type="checkbox"/> | PA     | Mixed - Group J2        | 32221       | 3000  | Jackie Moran        | Not Started | 0       |          | Jackie Moran        | 02/16/2026 |                     |                 | Jackie Moran        | 02/16/2026 |
| <input type="checkbox"/> | PA     | Default Family/Frien... | surv1       | sec1  |                     | Not Started | 0       |          | Westley Oliveira    | 02/16/2026 |                     |                 | Westley Oliveira    | 02/16/2026 |

Viewing 1-8 of 8

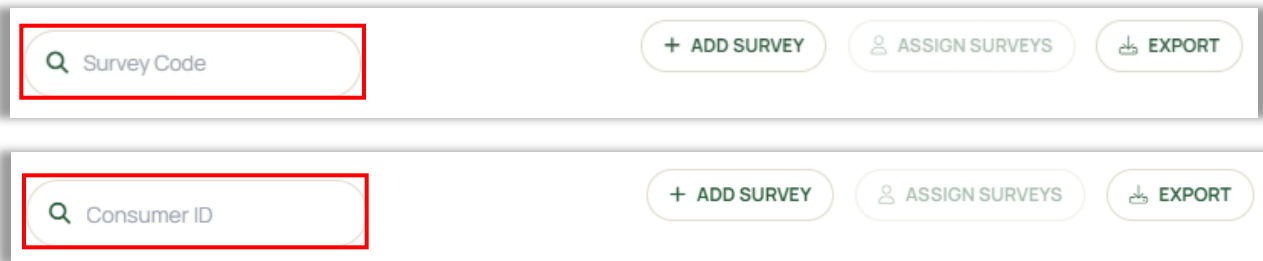
1

## All Admins: Search, Sort, and Filter

The Search, Sort, and Filter features are available in each of the survey grids under NCI-AD and NCI-IDD. Additionally, simple sorting functionality is available on the Manage Groups and Manage Users pages (more on these pages under “Administration Pages”).

## Search

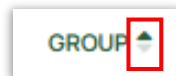
A Search field is available for queries and can be used in conjunction with sorting option. The Search function allows you to search for specific Survey Codes or Consumer IDs. Simply enter text in the search field and the table will be automatically filtered to surveys which include that text in the Survey Code/Consumer ID.



The image displays two identical search interface components. Each component consists of a search bar on the left, followed by three buttons: '+ ADD SURVEY', 'ASSIGN SURVEYS', and 'EXPORT'. In the top component, the search bar contains the text 'Survey Code' and is highlighted with a red rectangular box. In the bottom component, the search bar contains the text 'Consumer ID' and is also highlighted with a red rectangular box.

## 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.

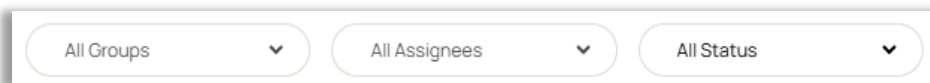


## Filter

There are three options for filtering the list of NCI-AD and NCI-IDD surveys:

1. Groups (available to Client Admins only)
2. Assignees (available to Client and Group Admins)
3. Status (available to users of all types)

Each subsequent dropdown will only be activated once a value is selected from the prior dropdown, i.e., you must first select a Group, and then an Assignee. Filtering by Status is available at all times.



The image shows three dropdown menu filters arranged horizontally. Each filter is a rounded rectangle with a light gray border and a small downward arrow on the right side. The first filter is labeled 'All Groups', the second is labeled 'All Assignees', and the third is labeled 'All Status'.

For Pennsylvania surveys, there is an additional filter available, and Group and Assignee do not need to be selected in order to filter by status.

1. AEs (Administrative Entities) (available to Client Admins only)
2. Assignees (available to Client and Group Admins)
3. Status (available to users of all types)
4. Date Finished (available to users of all types)

## Survey Grid

Each Survey Grid provides a list of surveys that have been entered into the system. The Survey Grid defaults to showing surveys sorted 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 Groups to which the survey is assigned. States will each have a unique list of Groups.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Code        | The unique Code assigned to the survey.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Interview   | <p>The date the interview was conducted. All dates and times are recorded in Coordinated Universal Time (UTC).</p> <p>Please Note: "Interview Date" is an <b>optional</b> 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.</p> <p>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.</p> |
| Added By    | The user/administrator who created the survey.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Added       | The date the survey was added to the system. All dates and times are recorded in Coordinated Universal Time (UTC).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

|                         |                                                                                                                                        |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| 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. All dates and times are recorded in Coordinated Universal Time (UTC). |
| Survey Completed By     | The user/administrator who completed the survey.                                                                                       |
| Survey Complete         | The date the survey was marked complete. All dates and times are recorded in Coordinated Universal Time (UTC).                         |
| Modified By             | The user/administrator who last made changes to the survey.                                                                            |
| Modified                | The date the survey was last modified. All dates and times are recorded in Coordinated Universal Time (UTC).                           |

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. All dates and times are recorded in Coordinated Universal Time (UTC).                               |

|                     |                                                                                                                                                                                         |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Survey Completed By | The user/administrator who completed the survey. Note: for Family Surveys (AFS, CFS, FGS), if this column contains “Guest User”, that indicates it has been completed via Direct Entry. |
| Survey Complete     | The date the survey was marked complete. All dates and times are recorded in Coordinated Universal Time (UTC).                                                                          |
| Modified By         | The user/administrator who last made changes to the survey. Note: if this column contains “Guest User”, that indicates the date the user last made changes via Direct Entry.            |
| Modified            | The date the survey was last modified. All dates and times are recorded in Coordinated Universal Time (UTC).                                                                            |

## Survey Grids for the AFS, CFS, and FGS

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. All dates and times are recorded in Coordinated Universal Time (UTC).         |
| Survey Completed By   | The user/administrator who completed the survey.                                                                           |
| Survey Complete       | The date the survey was marked complete. All dates and times are recorded in Coordinated Universal Time (UTC).             |

|             |                                                                                                              |
|-------------|--------------------------------------------------------------------------------------------------------------|
| Modified By | The user/administrator who last made changes to the survey.                                                  |
| Modified    | The date the survey was last modified. All dates and times are recorded in Coordinated Universal Time (UTC). |

## 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 In-Person Survey, be sure you are in the Survey Grid for the In-Person Survey) 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, each with a checkbox in the first column. The first three rows have checkboxes checked, and the last two are unchecked.

|                                     | GROUP                   | CODE     | ASSIGNED TO  | STATUS      | ANSWERS | LANGUAGE | ADDED BY     | ADDED      | SURVEY COMPLETED BY |
|-------------------------------------|-------------------------|----------|--------------|-------------|---------|----------|--------------|------------|---------------------|
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | A1001    | Jared Lestik | In Progress | 91      |          | Jared Lestik | 02/16/2026 |                     |
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | AZtest23 | Jared Lestik | Not Started | 0       | English  | Jared Lestik | 02/17/2026 |                     |
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | A1002    | Jared Lestik | Not Started | 0       |          | Jared Lestik | 02/16/2026 |                     |
| <input type="checkbox"/>            | Default AFS: Adult F... | A1003    | Jared Lestik | Not Started | 0       |          | Jared Lestik | 02/16/2026 |                     |
| <input type="checkbox"/>            | 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, containing only letters, numbers, dashes (-), or underscores (\_).

**Please Note:** “Interview Date” is an optional field that is manually entered and shown on the survey grid. It is only visible for the IPS and ACS, and 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.

**Add Survey - AFS: Adult Family Survey**

Group\*  
Select Group ▼

Survey Code\*

Region (ACS only)

Assigned User  
 ▼

Language  
Select Language ▼

**Save** CANCEL

Once a survey is created and the “Save” button is clicked, 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

PLEASE NOTE: “Group” is a required field, but not all states use groups to categorize their surveys. If your state does not use groups, please choose the default group for all added surveys.

If your state uses groups, the groups must be defined in advance of creating surveys. See section on “Manage Groups”.

## Assigning Surveys in Bulk

In the survey grid, there is a checkbox next to each survey. You can select one or more surveys by checking these boxes and then click the “Assign Surveys” button above the survey grid.

**AFS: Adult Family Survey**

Search: Survey Code

+ ADD SURVEY   **ASSIGN SURVEYS**   EXPORT

All Groups   All Assignees   All Status   Date Finished

|                                     | GROUP                   | CODE                     | ASSIGNED TO  | STATUS      | ANSWERS | LANGUAGE | ADDED BY     | ADDED      | SURVEY COMPLETED BY |
|-------------------------------------|-------------------------|--------------------------|--------------|-------------|---------|----------|--------------|------------|---------------------|
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | <a href="#">A1001</a>    | Jared Lestik | In Progress | 91      |          | Jared Lestik | 02/16/2026 |                     |
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | <a href="#">AZtest23</a> | Jared Lestik | Not Started | 0       | English  | Jared Lestik | 02/17/2026 |                     |
| <input checked="" type="checkbox"/> | Default AFS: Adult F... | <a href="#">A1002</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik | 02/16/2026 |                     |
| <input type="checkbox"/>            | Default AFS: Adult F... | <a href="#">A1003</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik | 02/16/2026 |                     |
| <input type="checkbox"/>            | Default AFS: Adult F... | <a href="#">A1004</a>    | Jared Lestik | Not Started | 0       |          | Jared Lestik | 02/16/2026 |                     |

Selecting “Assign Surveys” will open a popup with two dropdowns, Group and User, for assigning the surveys selected. Group Admins will only see the Groups they are assigned to in the Group dropdown.

**Assign Surveys**

All 3 selected surveys will be assigned to:

Group

Default CFS: Child Family Survey Group

User

Save CANCEL

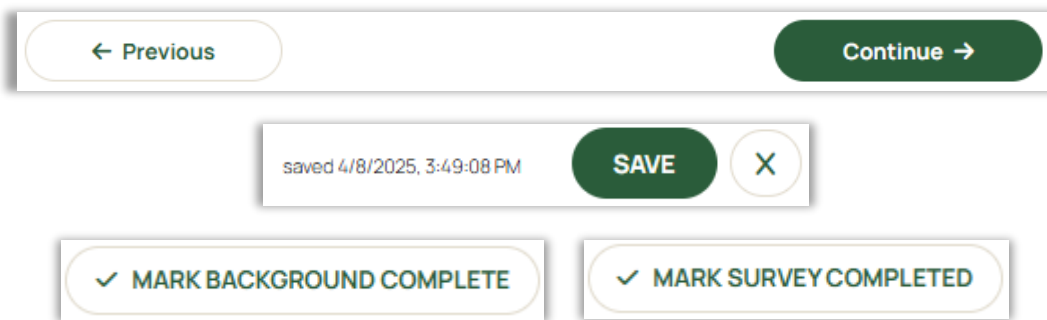
## Navigating the Survey

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:

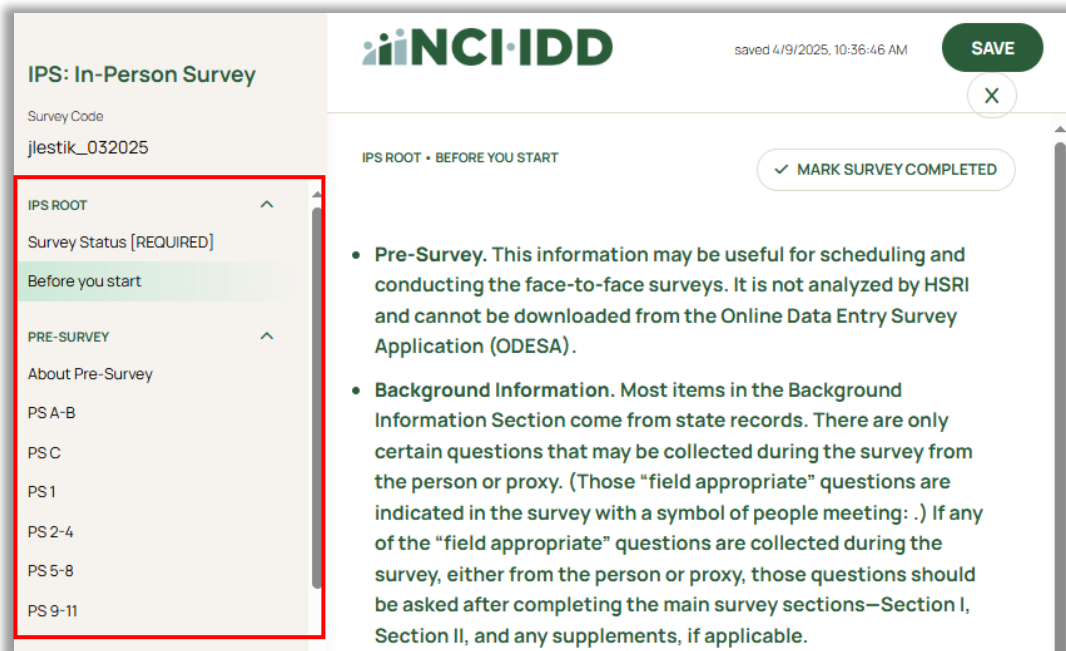
- **< PREVIOUS:** Moves to the preceding page in the survey. Data will automatically save when moving between pages.
- **CONTINUE >:** Moves to the following page. Data will automatically save when moving between pages.

- **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 Grid Page. Any questions answered so far will be retained even without pressing the Save button before using the Close button.
- **MARK BACKGROUND COMPLETE:** This will mark Background Information sections as completed. 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 button is 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.

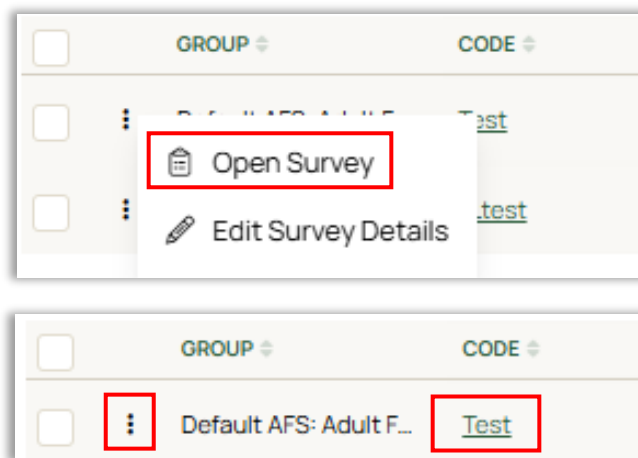


You may also use the Table of Contents (TOC) to navigate to any section of the survey by clicking on the section name to the left of the survey. The contents of the TOC will vary by survey. *Please note that if your state is not entering Pre-Survey information into ODESA, the Pre-Survey links will not be present.*



## All Admins: Data Entry

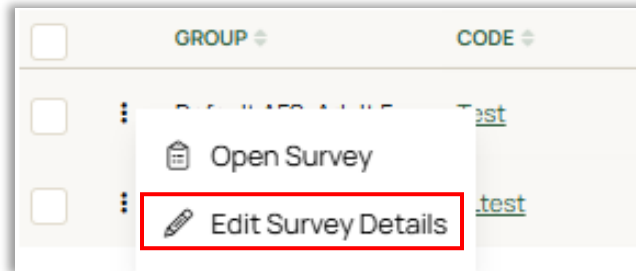
To edit an existing survey or add data, click on the survey code or select the three dots to the left of the Group column and select “Open Survey”. This will navigate to where data entry can be performed.



Clicking on the survey code or “Open Survey” will open the survey for data entry and you may view the survey and update it as needed.

## Editing a Survey Code or Customizing Survey Details

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.



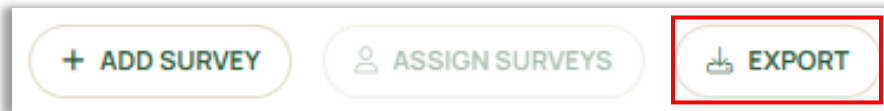
Clicking on this icon will display the Edit Survey page to change the Survey Code or other survey information. Surveys can also be assigned/reassigned to a user on this page, and the interview date can be added. Elements marked with an asterisk are required.

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.

A screenshot of the 'Edit Survey' form. The form has a title bar 'Edit Survey' in green. Below the title bar, there are several fields: 'Group\*' with a dropdown menu showing 'Default CFS: Child Family Survey Group'; 'Survey Code\*' with a text input field containing 'jlestik\_CFS\_052225'; 'Assigned User' with a dropdown menu; 'Language' with a dropdown menu showing 'Select Language'; and 'Interview Date' with a text input field showing 'mm/dd/yyyy' and a calendar icon. At the bottom of the form, there are three buttons: a green 'Save' button, a white 'CANCEL' button, and a red 'DELETE SURVEY' button with a trash icon.

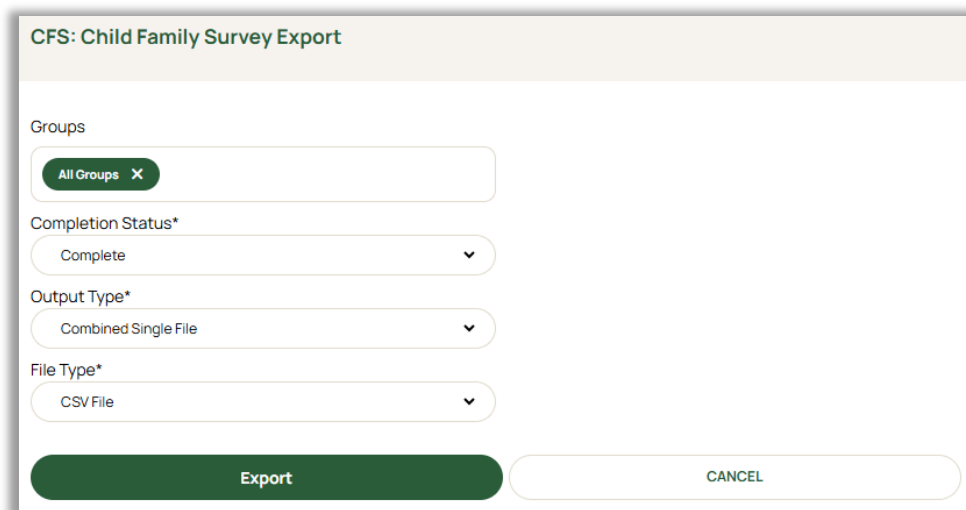
## All Admins: Generate a Survey Data Export

There is an option on each Survey grid to generate a survey data export. You can run an export by clicking the Export button above the table of surveys. This option is available to all admin level accounts (Client, Group).



Clicking on this link will display the survey export page, where you can select the options for which survey data should be exported. Elements marked with an asterisk are required. The options for exporting are as follows:

- Groups
  - Default is All Groups
  - Individual or multiple groups may be selected
- Completion Status
  - Options are All, Not Started, In Progress, Ready for QC, and Completed
  - Only one status can be selected
- Output Type
  - Options are Combined Single File or Multiple Files (per group). The Multiple Files option will export a separate file for each Group.
- File Type
  - Options are CSV File or Tab Delimited Text File



**CFS: Child Family Survey Export**

Groups

All Groups X

Completion Status\*

Complete

Output Type\*

Combined Single File

File Type\*

CSV File

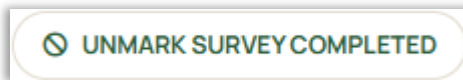
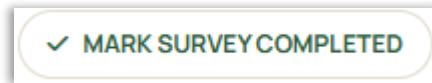
Export CANCEL

*Note that Pre-Survey data is withheld from the IPS and ACS exports due to it containing Personal Identifying Information (PII).*

The Survey Export will display all surveys based on the parameters selected, along with all questions represented by variable names and associated answers represented by numbers for each survey. For a guide to interpreting the export, please see the Codebook for the survey.

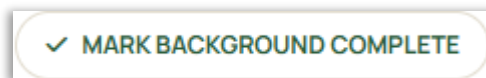
## Mark or Unmark Surveys as Completed

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 been marked as completed, this button changes to Unmark Survey Completed and allows for further editing when selected.



Please note: for unauthenticated 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.

## Delete a Survey

An existing survey can be deleted by first selecting the edit button (pencil icon) 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 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.

|                                                      |
|------------------------------------------------------|
| <b>AFS: Adult Family Survey</b>                      |
| Survey Code                                          |
| Test                                                 |
| <b>PART 2: QUESTIONS ABOUT SERVICES AND SUPPORTS</b> |
| 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)            |
| Access and Delivery of Supports (22 - 27)            |
| Access and Delivery of Supports (28 - 31)            |

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 FULLVERSION

☐ 0 PROXYVERSION

## 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

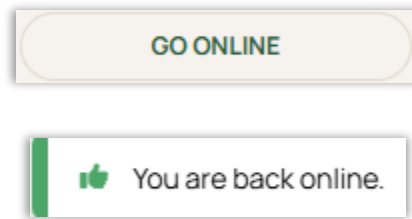
If the user is experiencing issues with internet connectivity when completing a survey, such as Wi-fi instability, Offline Mode can be toggled on to save the data locally and then upload it once connectivity is restored. The “Go Offline” button can be found at the bottom of the lefthand navigation panel 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 web browser's cache or history** before syncing with the server. Doing so will result in the loss of all data entered while in Offline Mode.

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:

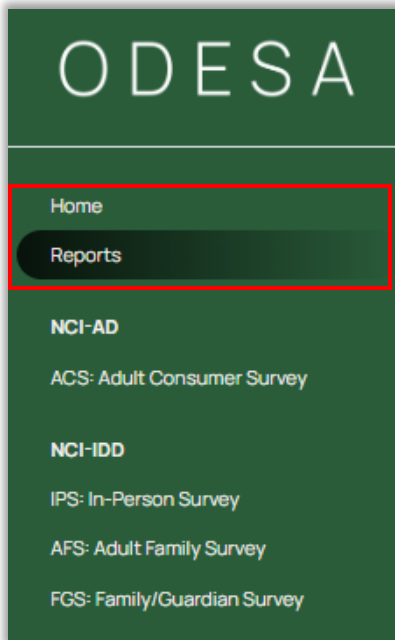
- Will ODESA save the data in a survey if you return to the survey grid while in Offline Mode? For instance, could you make edits to multiple surveys while in Offline Mode, then have them all sync when going back online?
  - **Each survey needs to be opened in a separate tab before going offline. You cannot load any admin screens or the survey grid 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 admin 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.

## All Admins: Reports

At the top of the lefthand navigation panel, there is a link to the Reports page under the “Home” category. Select this to open the Reports page.



**Reports**

**Select Report:**

Survey Progress by Month

**Select Survey:**

IPS: In-Person Survey

**Survey Progress by Month**

| Month         | Surveys Started <sup>1</sup> | Surveys Marked Finished <sup>2</sup> |
|---------------|------------------------------|--------------------------------------|
| October 2025  | 1                            | 0                                    |
| November 2025 | 1                            | 0                                    |
| <b>Total</b>  | <b>2</b>                     | <b>0</b>                             |

First

Previous

Page 1 of 1

Next

Last

Rows per page: 20

Report last updated: 4/20/26, 2:43 PM

<sup>1</sup> Surveys Started: Number of surveys where at least one answer has been entered into ODESA.

<sup>2</sup> Surveys Marked Finished: Number of surveys started and marked finished. This number can vary from other reports if a state marks surveys as Finished when no interview took place.

Available reports can be selected using the Select Report dropdown, and the survey type can be selected using the Select Survey dropdown. Note: certain reports are only available to Client Administrators.

**Select Report:**

Survey Progress by Month

Survey Progress by Month

Response Rate by Question

Survey Status Report

Family Survey Counts

**Select Survey:**

IPS: In-Person Survey

ACS: Adult Consumer Survey

IPS: In-Person Survey

AFS: Adult Family Survey

FGS: Family/Guardian Survey

Additional dropdowns may be present depending on the selected report type. The example below shows two additional dropdowns that are used to refine the search to specific sections and subsections for the Response Rate by Question report.

**Select Report:**

Response Rate by Question

**Select Survey:**

IPS: In-Person Survey

**Select Section:**

Section I

**Select Subsection:**

Home

Home

Employment and Other Daily Activities

Feeling Safe

Friends and Family

Community Participation and Leisure

Rights and Privacy

Staff

Service Coordination

For the Surveyor

|   |   |           |    |
|---|---|-----------|----|
| 3 | 3 | ENTERHM   | 0% |
| 4 | 4 | ENTERBRM  | 0% |
| 5 | 5 | BEALONE17 | 0% |

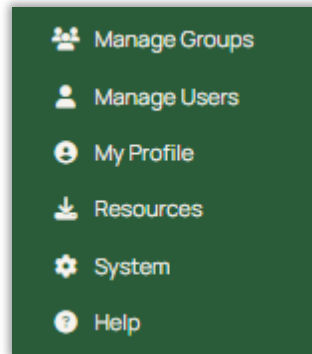
First Previous Page 1 of 1 Next Last

Rows per page: 20

Please note: all dates and times in reports are recorded in Coordinated Universal Time (UTC).

## All Admins: Administration Pages

The Administration Pages, located at the bottom of the left-hand navigation panel, provide access to various management tools. These pages include Manage Groups and Manage Users. Access to these pages varies by admin type. The Resources and Help pages are also located here, and they are accessible to both Administrators and Users.



## Client Admins: Manage Groups

Please note, the use and assigning of Groups to categorize surveys is optional for states. The Manage Groups page allows client administrators to manage a client's existing groups and add new ones. Groups are subsets/categorizations of surveys that may be used to identify surveys located in a specific part of a state, or to identify surveys assigned to a specific survey team, etc. The Manage Groups page is only available to Client Administrators; if logged in as a Group Administrator the link will not be visible.

Manage Groups

Active

Deactivated

View All

+ ADD GROUP

| SURVEY                      | NAME                                      | DESCRIPTION                               | DEFAULT |  |
|-----------------------------|-------------------------------------------|-------------------------------------------|---------|--|
| AFS: Adult Family Survey    |                                           | group from bulk upload                    | No      |  |
| AFS: Adult Family Survey    | Deactivated Test Group 2                  | test                                      | No      |  |
| AFS: Adult Family Survey    | Deactivated Test Group 3                  | test                                      | No      |  |
| AFS: Adult Family Survey    | Default AFS: Adult Family Survey Group    | Default AFS: Adult Family Survey Group    | Yes     |  |
| CFS: Child Family Survey    | Default CFS: Child Family Survey Group    | Default CFS: Child Family Survey Group    | Yes     |  |
| FGS: Family/Guardian Survey | Default FGS: Family/Guardian Survey Group | Default FGS: Family/Guardian Survey Group | Yes     |  |
| IPS: In-Person Survey       | Default IPS: In-Person Survey Group       | Default IPS: In-Person Survey Group       | Yes     |  |
| IPS: In-Person Survey       | IPS Test Group 1                          | test                                      | No      |  |
| IPS: In-Person Survey       | IPS Test Group 2                          | test 2                                    | No      |  |
| IPS: In-Person Survey       | New IPS RI Test Group                     | test group                                | No      |  |

Viewing 1-10 of 10

1

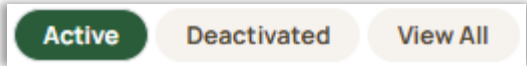
Manage Groups table columns:

- Survey: the type of survey to which the group is assigned
- Name: the name assigned to the group
- Description: a brief description of the group
- Default: yes/no values indicating whether the group is the default for the client and survey
- Pencil icon: select to edit the details of a specific group

## Client Admins: Sorting and Filtering the Manage Groups Table

Client Admins can sort the Manage Groups table alphabetically, in either ascending or descending order, by selecting a column header. The sorting order will be denoted by the arrow icons next to the column name. Sorting is available on all columns.

The table can also be filtered by Active or Deactivated groups using the buttons above the table:



Selecting View All will show all groups regardless of Active/Deactivated status. Deactivated groups are grayed out.

## Client Admins: Adding a New Group

If a new group needs to be added to the system, Client Admins can do so by selecting the Add Group button on the right side above the table of existing groups. This will open a new page where the details for a new group can be entered. Note: group names cannot be duplicated; for example, if a group exists for the ACS, it cannot be duplicated for the IPS and Family Surveys.

### Add Group

CLIENT GROUP INFORMATION

Associated Survey \*

IPS: In-Person Survey ▼

Name \*

Description \*

☐ Default Group

Save

CANCEL

Description of Fields on the Add Group Page:

- Associated Survey: the type of survey to which the group will be assigned (only surveys activated for the state will appear in the dropdown); options include:
  - ACS: Adult Consumer Survey
  - IPS: In-Person Survey

- AFS: Adult Family Survey
  - CFS: Child Family Survey
  - FGS: Family/Guardian Survey
- Name: the name to be assigned to the group; should be readily identifiable for the group's purpose.
  - Description: a brief description of the group, providing additional details that may not fit in the group name
  - Default Group: select to toggle whether the group is the default for the client and survey. If the group is designated as the "default", it will become the default group assigned to users if another group is not specified. If your state is not using groups to categorize surveys, a default group should be created. All surveys in that state will use the default group when created. Client Admins: Editing an Existing Group

If the pencil icon is selected for an existing group, you will see the same page as above, where you can edit the group details. Be sure to select Save once you have made your changes, or select Cancel to revert any changes to their prior settings.

**If logged in for the Pennsylvania client**, the view on this page will differ, though most of the above descriptions will still apply. Groups associated with Pennsylvania can be applied to multiple surveys, assigned by selecting the checkboxes next to each survey type as shown below.

Add Group

CLIENT GROUP INFORMATION

Associated Survey(s) \*

☐

All NCI-IDD Surveys

☐

IPS: In-Person Survey

☐

AFS: Adult Family Survey

☐

FGS: Family/Guardian Survey

☐

All PENNSYLVANIA Surveys

☐

Family/Friend/Guardian

☐

IM4Q Pre-Survey

☐

State Center Supplement

☐

Time Spent

Name \*

Description \*

☒ Default Group

Save

CANCEL

## Client and Group Admins: Manage Users

The Manage Users section provides user maintenance tools for Client and Group Admins to manage basic user accounts for a specific client. Only Client Admins may add new users and edit existing users, including activating/deactivating user accounts. Client and Group Admins may assign users to groups and resend account invitation emails to existing users.

| Manage Users                                                              |               |                       |                                  |         |                               |
|---------------------------------------------------------------------------|---------------|-----------------------|----------------------------------|---------|-------------------------------|
| <div> <div>Active</div> <div>Deactivated</div> <div>View All</div> </div> |               | <div>+ ADD USER</div> |                                  |         |                               |
| <div> <div>All Groups</div> <div>All Roles</div> </div>                   |               |                       |                                  |         |                               |
| FIRST NAME                                                                | LAST NAME     | ROLE                  | EMAIL                            | STATUS  |                               |
| Wes                                                                       | RIUser        | User                  | woliveira+riuser@hsri.org        | Active  | <div>RESEND</div> <div></div> |
| Wes                                                                       | RIGroupAdmin  | Group Admin           | woliveira+rigroupadmin@hsri.org  | Active  | <div>RESEND</div> <div></div> |
| Wes                                                                       | RIClientAdmin | Client Admin          | woliveira+riclientadmin@hsri.org | Active  | <div>RESEND</div> <div></div> |
| Jared                                                                     | Lestik3       | User                  | JaredXIII@live.com               | Active  | <div>RESEND</div> <div></div> |
| Karen                                                                     | Client Admin  | Client Admin          | kgruber+ca3@hsri.org             | Active  | <div>RESEND</div> <div></div> |
| Dorothy                                                                   | Hiersteiner   | User                  | dhiersteiner_RI@hsri.org         | Invited | <div>RESEND</div> <div></div> |
| Jared                                                                     | Lestik2       | Client Admin          | jjaredxiii@gmail.com             | Active  | <div>RESEND</div> <div></div> |
| Karen                                                                     | User role     | User                  | kgruber+user@hsri.org            | Active  | <div>RESEND</div> <div></div> |
| Viewing 1-8 of 8                                                          |               |                       |                                  |         | 1                             |

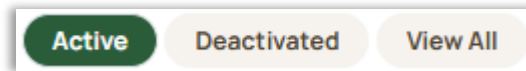
#### Description of Fields on the Manage Users Page

- First Name: the user's first name
- Last Name: the user's last name
- Role: the role assigned to each user that defines what functionality the user can access; See section called "Access to the Application by User Type" above for more information about each type of role. Options include:
  - Client Admin: has access to functionality pertaining to a specific state and can manage groups and users for that state
  - Group Admin: can manage users within a specific group
  - User: has access only to surveys assigned to them
- Email: the contact email for the user
- Status: the current status of the user's account; options include:
  - Active: the user's account is active and they can perform tasks applicable to their role
  - Invited: the user has been invited to access the system and can do so through a link sent by email
  - Inactive: the user's account has been deactivated and they do not have access to the system until reactivated
- Resend: selecting this button will send an email to the user with a link to complete their account setup

## All Admins: Sorting and Filtering the Manage User Table

The Manage Users table can be sorted alphabetically, in either ascending or descending order, by selecting a column header. The sorting order will be denoted by the arrow icons next to the column name. Sorting is available on all columns.

The table can also be filtered by Active or Deactivated users using the buttons above the table:



Selecting View All will show all users regardless of Active/Deactivated status. Deactivated users are grayed out.

Additionally, there are two categories by which the table can be filtered:



Description of filtering options:

- Groups: used to filter the list of users by group; leaving as All Groups will display users for all groups
- Roles: used to filter the list of users by role; leaving as All Roles will display users for all roles

More than one filtering option can be used to further refine the list of users to desired specifications.

## All Admins: Adding a New User

If a new user needs to be added to the system, Admins can do so by selecting the Add User button on the right side above the table of existing users. This will open a new page where the details for a new user can be entered. Be sure to select Save once all user details have been entered, or select Cancel to return to the Manage Users table without creating the user.



Note: When a new user account is created, an account activation email **will automatically and immediately** be sent to the new user's email.

Description of fields on the Add User page:

- User Role: the role assigned to the user; descriptions of roles can be found earlier in the "Access to the Application by User Type" section of this document
- First Name: the user's first name

- Last Name: the user's last name
- Email: the email address associated with the user's account; they will receive any system notices, such as invitations to complete account setup and multi-factor authentication requests, at this address
- Phone Number: the number at which the user can be contacted; this is not a required field
- User Access: if Client Admin, Group Admin, or User is selected for the user role, the list of available surveys (ACS, IPS, AFS, CFS, FGS) will be shown, and access to each can be toggled on or off.
  - For Group Admins and Users, there will also be a "Select Sections" dropdown (ACS and IPS only) where survey sections can be enabled or disabled for the user being added/edited.

**USER ACCESS**

☐ ACS: Adult Consumer Survey

☐ IPS: In-Person Survey

☐ AFS: Adult Family Survey

☐ CFS: Child Family Survey

☐ FGS: Family/Guardian Survey

**Sections**

Select Sections

- Pre-Survey
- Background Information
- Survey

## All Admins: Editing an Existing User

Selecting the pencil icon for a specific user will open a page where that user's information can be edited. In addition, active user accounts can be deactivated from this page, and deactivated user accounts can be reactivated. Be sure to select Save once you have made the necessary changes, or select Cancel to revert any changes to their prior settings.

**Edit User**

**USER INFORMATION**

User Role \*

User ▼

First Name \*

Jared

Last Name \*

Lestik

Email \*

JaredXIII@live.com

Phone Number

#### Description of Fields on the Edit User Page

- User Role: the role assigned to the user; descriptions of roles can be found earlier in the Manage Users section of this document
- First Name: the user's first name
- Last Name: the user's last name
- Email: the email address associated with the user's account; they will receive any system notices, such as invitations to complete account setup, at this address
- Phone Number: the number at which the user can be contacted; this is not a required field
- User Access: if Client Admin, Group Admin, or User is selected for the user role, the list of available surveys (ACS, IPS, AFS, CFS, FGS) will be shown, and access to each can be toggled on or off.

**USER ACCESS**

- ☐ ACS: Adult Consumer Survey
- ☐ IPS: In-Person Survey
- ☐ AFS: Adult Family Survey
- ☐ CFS: Child Family Survey
- ☐ FGS: Family/Guardian Survey

## All Admins: My Profile

Selecting “My Profile” in the lefthand panel will open the page seen below. Admins and 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.

**My Profile**

First Name \*

Test

Last Name \*

User

Email \*

TestUser@hsri.org

Phone Number

Save CANCEL

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.

**NCI** NATIONAL CORE INDICATORS  
PEOPLE DRIVEN DATA

POWERED BY ODESA

**Verification Method**  
Choose how you'd like to receive your one-time verification code.

☐ **Email**  
Send code to T\*\*\*\*@hsri.org

☒ **SMS Text Message**  
Send code to (\*\*\*-\*\*\*-0000

**Continue**

## All Admins: 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](mailto:dhiersteiner@hsri.org) or Stephanie Giordano (AD) at [sgiardano@hsri.org](mailto:sgiardano@hsri.org). If assistance is needed regarding state-specific topics, please contact your state's IDD or AD representative.

## All Admins: Help

For questions or technical assistance, please contact the ODESA support team at [ODESASupport@hsri.org](mailto:ODESASupport@hsri.org).

## Client Admin and/or State Contact: How to Administer Direct Entry for Family Surveys

For the mail-out Family Surveys, NCI-IDD has developed a **direct entry option**. This means that each family or guardian pulled for the sample will receive an Access Code that they can use to go online and respond to the Family Survey directly in ODESA. Within ODESA, these “direct entry” users are called “guest users.”

The following is the protocol for this option:

1. The state will send HSRI a list of unique survey codes which will serve as Access Codes for each survey recipient. (Please see 'Instructions for Sending Direct Entry Codes to HSRI', below, for details.)
2. HSRI will review the data to make sure required fields are included and there are no duplicates.
3. Upon receiving notification from HSRI that the codes have been processed, the state may then mail a **paper copy** of the NCI-IDD Family Survey and self-addressed stamped envelope to all survey recipients with a customized cover letter that introduces the survey, invites them to fill out the survey online or on paper, and includes their unique Access Code along with a link to the online survey. The state will receive the link to the survey in ODESA upon notification.

## Instructions for Sending Direct Entry Survey Codes to HSRI

Your state must provide HSRI with a list of unique survey codes, one for each survey recipient, according to the following guidelines:

1. Create an Excel spreadsheet containing the following fields: **STATE**, **SURVEY**, and **SURVCODE**
  - **STATE**: the two-character abbreviation for your state.
  - **SURVEY**: the three-digit code (AFS, CFS, or FGS) indicating the survey to be sent to the family or guardian.
  - **SURVCODE**: the survey codes for direct entry. Survey Codes must be 4-8 characters, containing only letters, numbers, dashes (-), or underscores (\_). These codes correspond to the 'Access Code' mailed along with the survey. Each survey code must be unique for your state across all Family Surveys. This is to say, survey codes may not be repeated in the three Family Surveys – for example, if there is a survey numbered '1234' for the AFS, there cannot be a '1234' for the FGS or CFS. For this reason, many states begin the code with a letter reflecting which survey will be mailed, as in the example below.
  - **GROUP**: The Group assigned to each survey record. If no Group is specified, the default Group for the survey type will be used, e.g., "Default AFS: Adult Family Survey Group".

| STATE | SURVEY | SURVCODE | GROUP                                  |
|-------|--------|----------|----------------------------------------|
| AZ    | AFS    | A1001    | Default AFS: Adult Family Survey Group |

2. Save the Excel spreadsheet as a .csv file

## Direct Entry Access to the Family Surveys

Your state will be notified once HSRI has loaded the Family Survey codes (also known as 'Access Codes') into ODESA. Please do not mail any Family Surveys until your state has received notification that the survey codes have been processed.

After the codes have been processed, they can be mailed out to families and guardians. A paper copy of the survey may also be included and is available in multiple languages which vary by state. Each family or guardian responding to the survey may use their unique Access Code to directly enter the Family Surveys at the provided survey link. They will be asked to select their state in addition to entering the Access Code.

The family member can access the survey more than once. If they are unable to finish in one sitting, they can simply go back to the provided survey link and re-enter their access code and state.

*Note: State ODESA users entering surveys that have been mailed in should use their regular ODESA login. Administrators can also view directly-entered surveys at their regular ODESA login. Only family members (or guardians) should use the provided survey link.*

If you have any questions, please email [ODESASupport@hsri.org](mailto:ODESASupport@hsri.org).

## Client Admin and/or State Contact: How to submit Background Information (BI) Bulk Uploads for ACS and IPS

If your state wishes to submit a BI Bulk Upload, the Excel template can be requested from the HSRI NCI project team. Using this option, you can send HSRI a file with responses to the Background Information (BI) questions (coded per our specification), and HSRI will upload the data into ODESA so it does not need to be entered manually. This is particularly helpful if all of the Background Information is being generated from existing databases.

The column headers in the template file represent variable names that correspond to the ODESA database. Survey questions comprised of a checklist that only allows a single selection will have a single variable name. If one of those options is “Other” with a text box attached to it, there will be a separate variable name for the text entry portion. Questions made up of checklists that allow multiple selections will have a variable name for each response, and the data value for each of these is limited to either “0” (ACS) or “1” (IPS) to represent “No”, or “2” to represent “Yes” or checked. For questions where the answer is unknown, the column should be left blank.

The data values in your file must follow the conventions we use to store answers in the ODESA database. HSRI can provide field specification documentation that defines how the data for each variable must be formatted. The meanings of numeric values are included in the field specs file, but you should only use the numeral. For example, “0”: No” means that for a “no” answer, only the numeral 0 should be included in your spreadsheet. For questions with checklist response options, the answers are always numeric, except when an “Other” response allows an additional text entry.

It is not necessary to provide values for all variables; if certain variables are not available for Bulk Upload, they can be added manually in the ODESA application after the upload is complete.

Please note that with this option, Background Information must be uploaded before any surveys (Section I and Section II) can be entered into ODESA.

REMINDER: ODESA cannot be opened until we process all relevant materials. Once we receive all materials, we need 40 business days to open ODESA for testing.

Once all records have been added, return the file to the NCI team. The file will be reviewed and tested in a local ODESA environment to ensure all validation checks pass prior to uploading the records into the production environment. You will receive notification once the upload has been completed.

Below is a sample view of a BI Bulk Upload file. Note: not all columns are visible, this is for demonstration purposes only.

| STATE | GROUP  | REGION | SURVEY_CODE | BI_AGE_SRC | BI_AGE | BI_AGE_CAT | BI_GENDER_SRC | BI_GENDER | BI_RACE_SRC | BI_RACE1 | BI_RACE2 | BI_RACE3 | BI_RACE4 | BI_RACE5 | BI_RACE6 | BI_RACE7 |
|-------|--------|--------|-------------|------------|--------|------------|---------------|-----------|-------------|----------|----------|----------|----------|----------|----------|----------|
| XX    | GROUP1 |        | Code123     | 1          | 55     | 1          | 1             | 2         | 1           | 0        | 0        | 2        | 0        | 0        | 0        | 0        |
| XX    | GROUP1 |        | Code124     | 1          | 61     | 1          | 1             | 1         | 1           | 0        | 0        | 0        | 0        | 2        | 0        | 0        |
| XX    | GROUP1 |        | Code125     | 1          | 29     | 1          | 1             | 1         | 1           | 0        | 0        | 0        | 0        | 2        | 0        | 0        |
| XX    | GROUP1 |        | Code126     | 1          | 22     | 1          | 1             | 1         | 1           | 0        | 0        | 2        | 0        | 0        | 0        | 0        |
| XX    | GROUP1 |        | Code127     | 1          | 60     | 1          | 1             | 2         | 1           | 0        | 0        | 2        | 0        | 0        | 0        | 2        |
| XX    | GROUP1 |        | Code128     | 1          | 55     | 1          | 1             | 2         | 1           | 0        | 0        | 0        | 0        | 2        | 0        | 0        |
| XX    | GROUP1 |        | Code129     | 1          | 39     | 1          | 1             | 2         | 1           | 0        | 0        | 2        | 0        | 0        | 0        | 0        |
| XX    | GROUP1 |        | Code130     | 1          | 55     | 1          | 1             | 2         | 1           | 0        | 0        | 2        | 0        | 0        | 0        | 0        |
| XX    | GROUP1 |        | Code131     | 1          | 64     | 1          | 1             | 2         | 1           | 0        | 0        | 0        | 0        | 2        | 0        | 0        |
| XX    | GROUP1 |        | Code132     | 1          | 70     | 1          | 1             | 1         | 1           | 0        | 0        | 0        | 0        | 2        | 0        | 0        |

## Client Admin and/or State Contact: How to submit Survey Code Bulk Uploads for IPS and ACS

For the Adult In-Person Survey (IPS) and Adult Consumer Survey (ACS), NCI has developed a bulk upload option for survey codes. This is separate from the Direct Entry option for Family Surveys.

The following is the protocol for this option:

1. All IPS/ACS survey codes for the survey cycle must be sent in a single file.
2. Please e-mail the file with your state's survey codes to
  - IPS: Dorothy Hiersteiner at [dhiersteiner@hsri.org](mailto:dhiersteiner@hsri.org).
  - ACS: Stephanie Giordano at [sgjordano@hsri.org](mailto:sgjordano@hsri.org)
3. HSRI will review the data to make sure required fields are included and there are no duplicates.
4. Please allow 40 business days after receipt of all relevant materials for HSRI to process the survey codes and upload to ODESA.

Your state will provide HSRI with a list of IPS survey codes according to the following guidelines:

1. Your file must contain the following fields: '**State**' and '**SurveyCode**' (IPS)/'**Survey\_Code**' (ACS)
  - **State**: the two-character abbreviation for your state.
  - **SurveyCode/Survey\_Code**: the survey codes to be uploaded to ODESA for the IPS/ACS.
    - **Note**: Survey codes must be 4-8 characters, containing only letters, numbers, dashes (-), and/or underscores (\_).

| State | SurveyCode |
|-------|------------|
| MA    | 78B123     |
| MA    | 08428A     |

*Sample Data*

- Optional for IPS: You may also include a field called '**Group**', which would contain the name of a user group that has been set up for your state.
  - If your file has no field called 'Group', the surveys will be assigned to the default user group.

- If your file does contain a field called 'Group', records containing a valid group (one that has been set up in ODESA and is active) will be accepted and uploaded
- If your file includes the 'Group' field, if or when a value in 'Group' is either blank or invalid, HSRI will contact you for instructions on how to handle that group.

2. If Using Excel:

- Save the Excel spreadsheet as an .xls (Excel 97-2003) file.
- You must make your survey codes a text column. To do this, select the column, choose 'Format Cells', and select 'Text'. (You can tell the data is stored as 'Text' when numbers are not right-justified.)

3. Other File Types:

- You may submit a text file, as long as the file name ends with either **.txt** or **.csv**
- A **.txt** file is a file where fields are delimited by tabs or another character (such as comma).
- A **.csv** file is a comma-delimited, Excel-compatible file. These are easy to generate from within Excel.