

V. Reference Documents

A section dedicated more to "how things work" and not necessarily how to use/fix things. Think of these as technical manuals for the various Survox Systems/Tools

- [Reference Material - Survox Dialer](#)
- [Reference Material - Standard Phone Disposition \(Dispo\) Codes](#)
- [Dashboard Overview - Shop Report](#)
- [Dashboard Overview - Dialer Dashboard Report](#)
- [Dashboard Overview - INTV Realtime Report](#)
- [Dashboard Overview - Production Report](#)
- [How To: Caller ID/LCP Settings & Call Interceptor Program](#)

Reference Material - Survox Dialer

How the Survox Predictive Dialer Works

Overview

The Survox dialer is not a simple "ratio dialer" where you set a fixed number like "dial 3 calls per agent." It is a predictive dialer driven by a live, dynamic algorithm that constantly adjusts how aggressively it dials based on what is happening on the floor in real time. Understanding how it works helps explain why contact rates change throughout a shift, why adding more agents does not always mean more dials, and why some nights perform better than others even with the same numbers.

The Algorithm Inputs

The dialer does not run on a fixed timer. Instead, it recalculates every time a job determines that more numbers need to be dialed -- typically because agents are waiting and available. Each time that happens, the following inputs are evaluated for that job:

1. Drop Rate (Actual vs. Target) -- The dialer tracks a configured drop threshold expressed as a value per 10,000 connects. A setting of 350, for example, means the system will tolerate up to 3.5% of connects resulting in a drop. The dialer does not simply try to stay under this number -- it actively tries to dial as aggressively as possible while landing just below the drop target. The live drop rate updates every time the algorithm fires.

When the drop rate exceeds the configured target, the dialer does not make a small adjustment -- it throttles back aggressively, dropping to near 1:1 dialing until the drop rate falls back below the threshold. Once recovered, it begins climbing back toward the 3:1 cap again. This recovery behavior can cause noticeable slowdowns on the floor and is why sustained high drop rates are worth monitoring closely.

2. Number of Available Agents -- The dialer evaluates how many agents are waiting and not currently on a call for that job. This is what triggers the recalculation in the first place. No waiting agents means no new dials.

3. Real-Time Connect Rate -- The connect rate also updates every time the algorithm fires. When the contact rate is high, agents are busy more often, the dialer does not need to push as hard to keep them occupied, and drop risk is lower. When the contact rate is low, agents are idle more often, the dialer pushes closer to the 3:1 cap to compensate, and the chance of a drop increases.
4. Capacity Settings (Two Hard Limits) -- Regardless of what the algorithm calculates, two hard caps always apply together:
 - Max 3 calls per waiting agent
 - Max 30 calls per second system-wide

Each job runs this calculation independently for itself. The shared 375-channel pool only becomes a factor if the combined math across all running jobs -- total active agents across all jobs multiplied by 3 -- would push past the 375-channel ceiling. In most normal operating conditions, that ceiling is never reached, and each job dials freely without any competition from other jobs.

What a "Drop" Actually Means

This is one of the most commonly misunderstood parts of how the dialer works.

A dropped call is NOT a respondent who picks up and then hangs up before reaching an agent. A dropped call is the dialer itself hanging up early -- before the call is ever answered -- because the algorithm has determined there is a risk that no agent will be available if the respondent picks up.

Even if the project is configured for 4 rings before abandoning, the dialer may cut a call off at 1, 2, or 3 rings if it calculates that sending that call through to a live pickup would create an agent availability problem. The respondent's phone may ring once or twice with no connection ever made from their perspective, and the dialer has already moved on.

This is intentional behavior. The dialer is constantly protecting the agent pool from being overwhelmed by live contacts with no one to handle them. And rather than simply avoiding drops, the algorithm actively hunts for the highest possible contact rate it can sustain while keeping drops just under the configured threshold.

Session Capacity and the 375-Channel Ceiling

Maximum Research has 375 concurrent call channels provided by the telco. Think of these as 375 phone lines that can be active at the same time across all dialing activity.

However, in normal operations, the 375-channel ceiling is rarely the actual constraint. The real practical limit is the "3 calls per waiting agent" rule combined with the 30 calls per second cap. Both apply at all times.

Example:

- 30 agents on the floor x 3 calls each = 90 channels maximum

- 375 channels available from telco
- 285 channels sitting completely idle

This is by design. The 3:1 rule was set because at our peak staffing of 100 to 110 agents, the math works out to:

- 110 agents x 3 calls = 330 channels needed at peak
- 375 available from telco
- 45-channel buffer (about 14% headroom)

This ensures that even on our busiest possible night, we never hit the telco ceiling and create a bottleneck.

Why Fewer Agents Can Mean More Dials Per Agent

This is counterintuitive but important. When fewer agents are working, the drop rate risk is lower because fewer calls are connecting overall, which allows the algorithm to dial more aggressively per agent.

Example comparison:

Night A -- 38 agents, high connect rate (7%)

- $38 \times 3 = 114$ max calls at once
- High connect rate means agents are busy -- dialer does not need to push as hard
- Drop risk is lower, but so is the need to dial aggressively
- Result: roughly 326 calls per hour

Night B -- 29 agents, lower connect rate (6.4%)

- $29 \times 3 = 87$ max calls at once
- Low connect rate means agents are idle more often -- dialer pushes closer to 3:1
- Greater drop risk, but algorithm pushes hard to stay just under the target
- Result: roughly 350 calls per hour

Night B made more calls per hour despite fewer agents. The algorithm pushing closer to the 3:1 cap to compensate for the lower contact rate was the deciding factor.

How Multiple Jobs Share Channels

Each job calculates its own dialing needs independently. In most cases, multiple jobs running simultaneously have no meaningful impact on each other, because the combined agent count across all jobs multiplied by 3 stays well under the 375-channel ceiling.

Channel competition only becomes a real factor if total active agents across all running jobs would push the combined demand past 375. If that threshold were approached, jobs with more agents

would carry more weight in claiming available channels, and the per-job drop rate and connect rate at that moment would further influence how many channels each job actually receives.

Under normal staffing conditions at Maximum Research, this ceiling is not a practical concern.

What This Means Operationally

- Early shift behavior is aggressive, not conservative. Because connect rate and drop rate values start at zero, the dialer has nothing to constrain it and immediately pushes toward the 3:1 cap. The result is that the majority of dropped calls typically occur early in a shift, with large swings between the actual drop rate and the target until enough call volume accumulates for the pattern to normalize.
 - Staffing level directly affects dialing behavior. More agents means more channels consumed, but a higher contact rate also means agents are busier and the dialer does not need to push as hard. There is a sweet spot -- typically around 25 to 35 agents for a single job -- where the algorithm can push closest to the drop threshold while maximizing contacts.
 - Two jobs running simultaneously is not a problem under normal staffing. Each job manages its own dialing independently and draws from the shared channel pool without conflict, as long as combined session demand stays under 375.
 - The 30 calls per second cap is a hard system limit that exists independently of everything else. On a typical night we do not come close to it, but it is there as a safeguard against runaway dialing.
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A Note on the Dashboard

The Survox dialer dashboard updates its displayed statistics every 10 to 15 seconds. This is intentional -- frequent screen refreshes create overhead, and the dashboard is a reporting display, not the calculation engine. The dialer itself is recalculating and firing far faster than what the dashboard reflects. Do not assume that what you see on the dashboard represents the dialer's current state at that exact moment.

Summary

The Survox predictive dialer is a self-regulating system. It is event-driven -- each job recalculates independently every time its agents are waiting and more dials are needed -- rather than running on a fixed clock. Its goal is not simply to stay within the configured drop threshold, but to find the highest possible contact rate it can sustain while landing just below that threshold.

Because of this, the dialer is always running as fast as the current conditions allow for each job. If a job is already hitting the 3:1 capacity ceiling and the drop target is not being exceeded, raising the drop target will have no effect -- the dialer is already at maximum speed and the drop rate simply

reflects the contact conditions that exist.

Multiple jobs running simultaneously operate independently without interfering with each other, unless combined session demand across all jobs approaches the 375-channel ceiling -- a situation that does not occur under normal staffing conditions at Maximum Research.

Reference Material - Standard Phone Disposition (Dispo) Codes

About Disposition Codes

Every time the Survox phone system touches a sample record - whether the dialer places the call, an interviewer speaks to someone, or the server processes a number behind the scenes - a disposition code is written to that record. This code is the system's way of recording exactly what happened and what should happen next.

Disposition codes control the entire lifecycle of a phone number through a study. They determine whether a record gets redialed, sits in a hold area, or is permanently closed out. Understanding them is essential for anyone managing a study, troubleshooting a sample, or interpreting production reports.

By default, Survox stores the last 12 calls made to a number, and each of those calls will contain one of these codes shown. The call result is stored in two spots of the phone numbers associated record. [6003.3] holds the "last attempt made" while 6103.3 is the first attempt, 6203.3 is the second attempt, 6303.3 is third and so on up until 7203.3 for the 12th attempt.

The below table uses two flags for each code:

- Connect?** Whether a live person (or at minimum, a live phone connection) was reached. Yes means the call got through in some form.
- Resolved?** Whether the record is permanently closed. Yes means Survox will not attempt this number again. No means the record remains eligible for future dial attempts, subject to study settings.

Codes are organized by number range, each group representing where in the system that outcome originated: manual interviewer action, the predictive dialer, or internal server/system logic.

Complete Disposition Code Reference

Code	Definition	Connect?	Resolved?
001-099 Standard Outcome Codes (set by interviewer or survey logic)			
001	Complete	Yes	Yes
002	Not Currently Used	Yes	Yes

Code	Definition	Connect?	Resolved?
003	Language Barrier (Non-Spanish)	Yes	Yes
004	Not Currently Used	Yes	Yes
005	Non-Working Number	No	Yes
006	Business/Government Number	Yes	Yes
007	Not Currently Used	Yes	Yes
009	Fax/CPU Tone Number	No	Yes
010	INTV Coded as Duplicate Number	Yes	Yes
011	No Such Person / Wrong Number	Yes	Yes
012	Not Currently Used	No	Yes
013	Against Company Policy	Yes	Yes
014	Number Added to DNC List	Yes	Yes
015	Respondent Hard Refusal or 2x Soft Refusal	Yes	Yes
016	Not Currently Used	No	Yes
017	Over Quota - Question Driven	Yes	Yes
018	Suspend -> Over Quota	Yes	Yes
019	Not Currently Used	No	Yes
020	Qualified Refusal	Yes	Yes
021	Question Terminate (see Statcode in QPX)	Yes	Yes
022	Question Terminate (see Statcode in QPX)	Yes	Yes
...	includes all codes between 21-60	Yes	Yes

Code	Definition	Connect?	Resolved?
060	Question Terminate (see Statcode in QPX)	Yes	Yes
069	Complete Pulled Up by INTV	No	Yes
099	Dialer Got 4 No Answers in a Row	No	Yes
Code	Definition	Connect?	Resolved?
101-213 Active / Live Codes (record remains available for redialing)			
101	No Answer	No	No
102	Busy	No	No
103	Busy Changed to No Answer (2 busy in a row become No Answer)	No	No
104	Callback (Specified date/time)	Yes	No
105	Callback (Unspecified)	Yes	No
106	Callback (Tomorrow)	Yes	No
107	Answering Machine / Voicemail	Yes	No
121	Dialer Dead Air / Sent No One	No	No
152	Spam Busy	No	No
156	Get Specific Stack (pull by search only)	No	No
182	Busy Forced to No Answer (retry was outside calling hours)	No	No
183	Not Currently Used	No	No
185	Respondent Hung Up in Intro (Bucket 9 / Hold Area)	Yes	No
187	All Targeted Attempts Made	No	No

Code	Definition	Connect?	Resolved?
189	Soft Refusal (Bucket 9 / Hold Area)	Yes	No
191	Special Status 1 - Spanish Speaking	Yes	No
192	Special Status 2	No	No
193	Special Status 3	No	No
194	Special Status 4 - Terminate in Middle / Dead Suspend	Yes	No
195	Special Status 5	No	No
196	Special Status 6	No	No
197	Special Status 7 - "Dead" Suspend (TERM_IN_MID)	Yes	No
198	Special Status 8	No	No
199	Special Status 9 - Respondent Not Available for Study Duration	Yes	No
211	Put Back - Top of List	No	No
212	Put Back - Bottom of List	No	No
213	Send to Hidden Bucket	No	No
Code	Definition	Connect?	Resolved?
801-821 Dialer - Resolved (dialer-assigned, record is closed)			
801	Dialer: Number Not Dialed	No	Yes
802	Dialer: Timed Number Not Dialed	No	Yes
803	Dialer: Unknown Number	No	Yes
804	Not Currently Used	No	Yes
807	Dialer: Bad Number	No	Yes

Code	Definition	Connect?	Resolved?
808	Dialer: Modem Answered	No	Yes
809	Dialer: Disconnected	No	Yes
810	Dialer: Forced Resolved	No	Yes
811	Not Currently Used	No	Yes
812	Dialer: Changed Number	No	Yes
815	Dialer: Number Too Old to Call	No	Yes
818	Dialer: SIP Non-Working	No	Yes
819	Dialer: No Connect	No	Yes
821	Dialer: INTV Disconnect	No	Yes
Code	Definition	Connect?	Resolved?
851-875 Dialer - Active (dialer-assigned, record remains in play)			
851	Dialer: No Answer	No	No
852	Dialer: Busy	No	No
853	Dialer: Busy to No Answer	No	No
854	Dialer: Trunk-Line Busy	No	No
855	Dialer: Incomplete Callback	No	No
856	Dialer: Nuisance (Dropped) Call	No	No
857	Dialer: Answering Machine	No	No
859	Dialer: Hung Up Phone	No	No
860	Not Currently Used	No	No
861	Dialer: Connect then Abort	No	No
862	Not Currently Used	No	No

Code	Definition	Connect?	Resolved?
863	Dialer: No Ringback	No	No
864	Dialer: Connected ATD	No	No
870	Dialer: Rejected Call	No	No
871	Dialer: No User Responding	No	No
872	Dialer: Channel Unavailable	No	No
873	Dialer: Temp Failure	No	No
875	Network Bad (likely temporary failure)	No	No
Code	Definition	Connect?	Resolved?
900-908 Survent / Station Codes (set by the interviewer station or survey engine)			
900	Number 'In the Air' (at the interviewer station)	No	No
901	Survent: Blow Error	No	No
902	Survent: SIGHUP / Terminal Abort / Suspend-Callback in 24 hrs	No	No
903	Survent: Auto-Suspended (web survey)	No	No
904	Not Currently Used	No	No
905	Survent: Suspended Due to Max Idle Time	No	No
906	Not Currently Used	No	No
907	Phone Quota Retry (was 997 - rescheduled like a busy)	No	No
908	Phone Cluster Retry (was 998 - rescheduled like a busy)	No	No
Code	Definition	Connect?	Resolved?
950-999 Server / System Codes (assigned by server logic, not interviewer action)			

Code	Definition	Connect?	Resolved?
950	Not Currently Used	No	No
951	Server: Duplicate Number Found - Do Not Call	No	Yes
952	Server: Number in DNC Prefix List - Do Not Call	No	Yes
953	Server: Number in DNC List - Do Not Call	No	Yes
954	Number Completed by Validator	No	No
955	Phone Number Killed by Foneutil or Super/Boss	No	Yes
956	Server: Number in DNC Email List - Do Not Call	No	Yes
971	Forced Resolved by Dialer	No	No
972	Not Currently Used	No	No
973	Max Calls Limit Reached	No	No
974	Max Calls Ever Reached	No	No
975	Over Phone Quota - Resolved	No	No
976	Over Quota Percent - Resolved	No	No
977	Dialer Failed Transfer to Validator	No	No
978	Server Failed Transfer to Validator	No	No
979	Not Currently Used	No	No
980	Bad Status Set	No	No
983	Bad Phone Record	No	No
984	Dialer Status Returned with No Corresponding CfMC Status	No	No
985	Invalid Time in Timed Callback	No	No

Code	Definition	Connect?	Resolved?
986	Bad 'Putfone' With Zero in Field	No	No
987	Bad Stuff in Phone Record	No	No
988	Unknown Status	No	No
989	Bad Special Interviewer Type Value	No	No
990	No Stack Found	No	No
991	Max History Check Error	No	No
992	No Next Bucket	No	No
993	Bad 'Putfone'	No	No
994	Number Identified as an "Error Record"	No	Yes
999	Reserved - !phone,s (use status in specified location)	No	No

Notes on Code Usage

***Question Terminates (021-060):** These codes are set programmatically within the survey itself. What each one means depends entirely on how the programmer set up the QPX statcode logic for that specific study. There is no universal meaning - always refer to the study's QPX file to interpret these.

****Special Statuses (191-199):** General-purpose hold codes whose meaning is defined at the study level. Codes 191, 194, 197 and 199 are the most commonly assigned with consistent meaning: mid-interview termination and extended respondent unavailability, respectively.

*****Not Currently Used:** These code slots exist in the system but are not actively assigned. They should not appear in normal study logs. If encountered, it typically indicates a system anomaly or a very old study configuration.

******Missing Codes:** Some codes are explicitly missing from the list, as they are either "reserved" for future use, or specific to a dialer other than the Survox Dialer.

*******Dialer: Rejected Code:** These are a newer code that has started to appear, as a result of carriers implementing call screening services. While survox treats these as system numbers, and tries calling them back on the normal system callback times, carriers have identified they are being rejected and are either invalid or spam blocked, and thus never going to reach a respondent. If a large quantity of these start appearing, you can ask DP to "kill" them, so they no longer get redialed.

*******Error Records:** These are the last great mystery of Survox sample management... *MOST OF THE TIME* they are simply a disconnected number, but the code the end carrier sent back is not one the dialer knows how to handle, so it just dumps them into the "Error Status" stack. In theory, these could be zapped and tried again but would most likely result in the same status being sent back again. There are also rare occasions where a number gets somehow "corrupted" via strange callback times, or other system issues. This happens very infrequently though and should be investigated when it happens. *Note: When dialing in 1:1 mode, these are "changed" to normal disconnected.*

*******Killing Numbers:** At times, it may be required to "kill" numbers, assigning a status "955" and removing them from dialing completely. This can be done similar to hiding/revealing, in a super/boss using the `phone_kill jobname select <enter>` or in the Console under **Manage, Manage Sample, Resolve Numbers**, and putting in the select statement.

Dashboard Overview - Shop Report

The Shop Report

What Is the Shop Report?

The Shop Report is a PhoneOps dashboard available through the MAXWell Portal under **PhoneOps Dashboards** in the left-hand navigation menu. It provides a shift-level overview of agent and project performance for the current workday.

The report is a **static webpage** that refreshes every **5 minutes**, from **9:00 AM through 2:00 AM**. Those viewing the page need to manually refresh to see updates, it is not automatic. All data displayed reflects two things:

- **Point-in-time snapshot** -- the numbers shown are as of the last time the report ran
- **Cumulative totals** -- figures accumulate across the full shift from open to that snapshot

“ **Important:** The Shop Report is a *shift overview tool only*. It is not intended for calculating production targets, incidence rates, dialer settings, or productivity metrics. Use the appropriate dedicated tools for those purposes.

Table of Contents

At the top of every Shop Report is a **clickable Table of Contents**. Each entry is a hyperlink that will jump your browser directly to that section of the report. This is useful when the report is long -- particularly on heavy shift days with many active projects and agents. Rather than scrolling through the entire page, use the Table of Contents to navigate directly to the project or agent you want to review.

TABLE 001	Interviewer Statistics Overall Study Totals
TABLE 002	Interviewer Statistics Study Counts By INTV BASE: Study_name[1601.30:BRZ17S]
TABLE 003	Interviewer Statistics Study Counts By INTV BASE: Study_name[1601.30:CLP]
TABLE 004	Interviewer Statistics Study Counts By INTV BASE: Study_name[1601.30:CSMT]
TABLE 005	Interviewer Statistics Study Counts By INTV BASE: Study_name[1601.30:ETS]
TABLE 006	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:AIDA SANTOS]
TABLE 007	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:ANTHONY MOBLEY]
TABLE 008	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:BRITNEY BEAMON]
TABLE 009	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:CHRISTINA RODRIGUEZ]
TABLE 010	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:DENISE IRELAND]
TABLE 011	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:ELISABETH OZUNA]
TABLE 012	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:JAMIE JARACZEWSKI]
TABLE 013	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:JOANNE WILSON]
TABLE 014	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:KAITLYN GEDDES]
TABLE 015	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:LINDA HALL]
TABLE 016	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:LIZCETT RIVERA]
TABLE 017	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:NYASIA STERLING]
TABLE 018	Interviewer Statistics INTV Counts By Study BASE: Intv_name[5.25:SHERRE DUFFIN]

Report Layout

The Shop Report is organized into three sections, in this order:

1. Overall Project Summary

The first section is a **pre-job summary** that rolls up all agents working the shift into a single combined row per project. No individual agent breakdown is shown here -- it is a top-level view of each project's collective numbers before drilling into the detail tables below.

TABLE 001

Interviewer Statistics

Overall Study Totals

LIVE INTERVIEWING (All Times are Hours, Unless Noted)											TRAINING		BREAKS			AVERAGE LOS (Mins)	DIALS PER HOUR	
TOTAL LOGGED TIME	TIME BETWEEN INTERVIEWS (Includes Bar/LSB/MSB)	SOYA TIME (Sum of OI for each EXCLUDING Bar/LSB/MSB)	TIME IN INTERVIEWS	TIME BEFORE PHONE CALL (Waiting/Dialing)	TIME LIVE INTERVIEW (Talking)	TIME ON COMPLETES	TIME ON NON-COMPLETES	INTERVIEWS STARTED	INTERVIEWS COMPLETED	INTERVIEWS NOT COMPLETED	PRACTICE TIME (Mins)	PRACTICE INTERVIEWS	BREAK TIME (Mins)	LUNCH TIME (Mins)	MEETING TIME (Mins)			
TOTAL	40.80	5.64	2.53	35.15	0.50	34.65	11.26	23.89	1146	133	1013	0.00	-	60.00	104.42	12.07	5.1	30.3
BRZ17S	2.58	0.01	0.02	2.57	0.14	2.43	1.81	0.65	28	6	22	0.00	-	0.00	0.00	0.00	19.1	10.8
CLP	6.71	0.65	0.61	6.06	0.01	6.06	1.44	4.62	245	27	218	0.00	-	4.00	0.17	0.00	3.7	36.9
CLPSP	5.51	0.25	0.07	5.27	0.21	5.06	2.65	3.22	239	14	225	0.00	-	13.40	0.00	0.00	8.6	45.2
ETS	25.99	4.73	1.83	21.26	0.15	21.11	5.46	15.60	634	86	548	0.00	-	42.52	104.25	12.07	3.9	27.2

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2. By-Project Tables (Broken Down by Agent)

Following the summary, there is one table for **each active project**. Each project table lists every agent/interviewer who worked that project during the shift, with their individual stats in each column. This view is useful when you want to evaluate how a specific project is performing and which agents are contributing to -- or dragging on -- that project's numbers.

TABLE 005

Interviewer Statistics

Study Counts By DTV

BASE: Study_name[100130:ETS]

	LIVE INTERVIEWING (All Times are Hours, Unless Noted)									TRAINING		BREAKS			AVERAGE LOI (Mins)	DIALS PER HOUR		
	TOTAL LOGGED TIME	TIME BETWEEN INTERVIEWS (Including Break/Lch/Meet)	SOYA TIME (Sitting at Q to get EXCLUDING Break/Lch/Meet)	TIME IN INTERVIEWS	TIME BEFORE PHONE CALL (Waiting/Dialing)	TIME LIVE INTERVIEW (Talking)	TIME ON COMPLETES	TIME ON NON-COMPLETES	INTERVIEWS STARTED	INTERVIEWS COMPLETED	INTERVIEWS NOT COMPLETED	PRACTICE TIME (Mins)	PRACTICE INTERVIEWS	BREAK TIME (Mins)			LUNCH TIME (Mins)	MEETING TIME (Mins)
TOTAL	25.99	4.73	1.83	21.26	0.15	21.11	5.66	15.60	634	86	548	0.00	-	42.52	104.25	12.07	3.9	27.2
ANTHONY MOSELEY	2.35	0.56	0.34	1.79	0.00	1.78	0.89	0.89	63	17	46	0.00	-	0.00	0.00	0.00	3.2	26.9
MICHAEL BEARSON	2.70	1.27	0.72	1.43	0.08	1.36	0.46	0.97	34	9	25	0.00	-	0.00	42.38	0.00	3.1	17.0
GENEISE BELAND	3.00	0.49	0.03	2.51	0.00	2.51	0.58	1.93	141	8	133	0.00	-	0.00	28.12	0.00	4.4	55.6
ELIZABETH JOYNA	2.73	0.12	0.15	2.61	0.04	2.57	0.49	2.11	53	6	47	0.00	-	0.00	0.00	0.00	4.9	19.4
KATHLYN GORMES	3.07	0.22	0.03	2.85	0.01	2.84	0.43	2.43	108	8	100	0.00	-	11.78	0.00	0.00	3.2	37.6
LINDA HALL	3.48	0.38	0.16	3.11	0.01	3.10	0.96	2.15	95	16	79	0.00	-	13.27	0.00	0.00	3.6	29.1
LIZZETT MONICA	3.34	0.76	0.12	2.58	0.01	2.57	0.88	1.71	65	11	54	0.00	-	4.92	33.75	0.00	4.8	24.1
WYAGRA STEERING	3.82	0.31	0.14	2.71	0.00	2.71	0.53	2.18	31	4	27	0.00	-	10.40	0.00	0.00	8.0	10.9
SHERRIE GUSTIN	2.30	0.43	0.15	1.67	0.00	1.67	0.42	1.24	44	7	37	0.00	-	2.15	0.00	12.07	3.6	21.4

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3. By-Agent Tables (Broken Down by Project)

After all project tables, the report switches perspective. There is one table for **each agent/interviewer** who worked during the shift, showing their stats broken down by each project they touched. This view is useful when evaluating an individual agent's overall shift performance across all work they did that day.

TABLE 009

Interviewer Statistics
DTV Counts By Study
BASE: Intv_name[5:35:CHRISTINA RODRIGUEZ]

	TOTAL LOGGED TIME	TIME BETWEEN INTERVIEWS (Including Break/Lch/Meet)	SOYA TIME (Sitting at O to get EXCLUDING Break/Lch/Meet)	LIVE INTERVIEWING (All Times are Hours, Unless Noted)									TRAINING		BREAKS			AVERAGE LOI (Mins)	DIALS PER HOUR
				TIME IN INTERVIEWS	TIME BEFORE PHONE CALL (Waiting/Dialing)	TIME LIVE INTERVIEW (Talking)	TIME ON COMPLETES	TIME ON NON-COMPLETES	INTERVIEWS STARTED	INTERVIEWS COMPLETED	INTERVIEWS NOT COMPLETED	PRACTICE TIME (Mins)	PRACTICE INTERVIEWS	BREAK TIME (Mins)	LUNCH TIME (Mins)	MEETING TIME (Mins)			
TOTAL	3.32	0.02	0.03	3.30	0.16	3.14	2.43	0.87	50	10	40	0.00	-	0.00	0.00	0.00	14.6	15.1	
BLZ/170	2.58	0.01	0.02	2.57	0.14	2.43	1.91	0.65	28	6	22	0.00	-	0.00	0.00	0.00	19.1	10.8	
CONF	0.74	0.01	0.02	0.73	0.03	0.70	0.52	0.21	22	4	18	0.00	-	0.00	0.00	0.00	7.8	29.9	

Column Definitions

All tables -- whether by project or by agent -- share the same set of column headers. Definitions for each are below.

Time Columns

Total Logged In Time

The total amount of time the agent was logged into the system during the shift. This is the "clock in / clock out" window and includes all activity -- dialing, interviews, breaks, lunch, meetings, and idle time.

Time Between Interviews

The total time spent between interview attempts. *This includes Break, Lunch, and Meeting time.* A high value here relative to Total Logged In Time may warrant a closer look at how the agent is spending non-interview time.

SOYA Time (Sitting On Your Ass)

SOYA is a term for agents who are logged in and idle -- not actively dialing, not in an interview, and not on a logged Break, Lunch, or Meeting. In plain terms: they are on the clock but not working. **SOYA time explicitly excludes Break, Lunch, and Meeting time**, so there is no ambiguity -- if an agent has SOYA time, they were sitting idle with no legitimate reason logged. Supervisors should pay attention to agents with elevated SOYA values.

Time In Interviews

The total time the agent spent in the full interview cycle -- from the moment dialing began, through the live call, through to disposition. This includes Time Before Phone Call (waiting/dialing) and Time Live Interview, and covers both completed and non-completed interviews.

Time Before Phone Call

The total time the agent spent in a waiting or dialing state before a call was connected. This reflects dialer queue and ring time.

Time Live Interview

The total time the agent spent actively talking during interviews. This is the "on the phone" time only -- not wrap-up or disposition time.

Time On Completes

The total time spent on interviews that resulted in a **completed** survey.

Time On Non-Completes

The total time spent on interviews that did **not** result in a completed survey (refusals, screen-outs, disconnects, etc.).

Practice Time (Mins)

The total number of minutes the agent spent in practice/training mode interviews. Practice calls are separate from live production dialing.

Break Time (Mins)

Time logged under the Break status. This covers short departures -- bathroom breaks, grabbing a drink, stepping away briefly. This is *not* for extended breaks.

Lunch Time (Mins)

Time logged under the Lunch status, intended for longer break periods. **Note:** Many agents simply log out and log back in for lunch rather than using the Lunch status, so this value may underreport actual lunch time taken.

Meeting Time (Mins)

Time logged under the Meeting status. This is used when an agent is in a virtual meeting with a supervisor, or is conducting a post-call review with a team member (such as going over a monitoring report). It is a legitimate and expected status for quality control workflows.

Interview Count Columns

Interviews Started

The total number of interviews the agent started during the shift. An interview is considered "started" as soon as a call connects to the agent -- regardless of outcome. This includes any call that made it through to the agent/interviewer.

Interviews Completed

The number of interviews that were finished and resulted in a completed survey.

Interviews Not Completed

The number of interviews that started but did not result in a completion (refusals, screen-outs, early disconnects, etc.).

Practice Interviews

The number of interviews completed while in practice/training mode.

Calculated Columns

Average LOI (Mins)

An *approximation* of the average Length of Interview, in minutes, for completed surveys. It is calculated as:

Time On Completes / Interviews Completed

Because this uses total time on completes (which includes dialing and any pre-intro time), it will report **higher** than the official internal LOI figure, which measures only from the survey intro through the last question. Do not use this value as your authoritative LOI -- use it only as a general reference.

Dials Per Hour

This is **not** a true calls-per-hour metric. It is calculated as:

Interviews Started / Time In Interviews (in hours)

The denominator is **Time In Interviews only** -- SOYA, Break, Lunch, and Meeting time are excluded. Since "Interviews Started" only counts calls that connected to an agent -- not all dial attempts -- this figure reflects connected call rate per active interview hour, not raw dial volume.

Quick Reference -- What This Report Is and Is Not

<u>The Shop Report IS...</u>	<u>The Shop Report is NOT...</u>
A shift-level overview of agent and project activity	A production calculation tool
A way to spot idle agents (SOYA)	A dialer performance or settings tool
A way to compare agent time usage across a shift	An incidence rate calculator

Updated every 5 minutes (9am - 2am)	Real-time (data is always up to 5 min behind)
Cumulative from shift open to last refresh	A historical or multi-day report

Accessing Historical Snapshots

End-of-day snapshots of the Shop Report are saved automatically and archived for future reference. These are **not browsable** -- there is no list or calendar to click through. To access a specific date, you need to manually edit the URL in your browser's address bar.

The live report URL ends in `/report.html`. To load a saved snapshot, append an underscore followed by the date in `YYMMDD` format:

Report	URL Format	Example
Live (current day)	<code>/report.html</code>	<code>/report.html</code>
Specific date snapshot	<code>/report_YYMMDD.html</code>	<code>/report_250314.html</code> (March 14, 2025)

Simply replace `YYMMDD` with the two-digit year, two-digit month, and two-digit day of the date you want to view.

Troubleshooting

A job is not appearing in the report

If a project just started in the last 4 or so minutes, the report may not have refreshed yet to include it. Wait for the next 5-minute update cycle and reload the page manually.

The report is showing yesterday's data

This means no projects have run yet today. The report will continue to display the previous day's data until activity begins for the current shift.

The math looks off on an agent's row

This can happen when an agent does not properly quit out of the system at the end of their session. When this occurs, the system may still consider them active, and the final counters for that session do not get updated correctly -- resulting in calculation errors. The data shown reflects what the system recorded up to that point. Adjust your interpretation of that agent's numbers accordingly.

Data does not seem to be updating

The page does **not** auto-refresh in your browser. You must manually refresh the page to see the latest data. The report updates its underlying data every 5 minutes, but you will not see those

updates until you reload.

In Closing

The Shop Report is one of the most frequently referenced tools available to shift supervisors. Used correctly, it gives you a fast, reliable read on how the shop is running -- who is working, who isn't, how projects are pacing, and where time is being spent. Keep in mind its core limitations: it is a snapshot, not a live feed; it is a shift overview, not a production or dialer analysis tool; and some figures (LOI, Dials Per Hour) are approximations by design. As long as you are reading it in that context, it is an effective and efficient part of your shift management workflow.

For questions about the Shop Report or to report a data issue, contact IT.

Dashboard Overview - Dialer Dashboard Report

The **Dialer Dashboard** is a real-time view of dialing activity across all active projects. It is accessible through the **MAXWell Portal** via the **PhoneOps Dashboard** option in the left-side navigation menu.

The dashboard refreshes automatically every **15 seconds** and is active between **9:00 AM and 2:00 AM** daily, covering the full span of dialing operations.

Dashboard Layout

The dashboard is organized into two main sections:

Overall Study Summary

The top section displays a **single rolled-up row per project**, combining the activity of all agents currently working that project into one summary line. This gives ops staff and PDs a quick at-a-glance view of how each project is performing across the floor without having to dig into individual agent detail.

Overall Study Summary

Study ID	Total									Current Hour									Previous Hour								
	Dialed	Connected	Dropped/DNOI	Refusals (RHUSREFHRE/DNC)	Resolved	Complete	Term	Over Quota	Incidence	Dialed	Connected	Dropped/DNOI	Refusals (RHUSREFHRE/DNC)	Resolved	Complete	Term	Over Quota	Incidence	Dialed	Connected	Dropped/DNOI	Refusals (RHUSREFHRE/DNC)	Resolved	Complete	Term	Over Quota	Incidence
ets	690	502	96	57	185	98	77	0	56.0%	6	5	1	2	0	0	0	0		15	11	3	2	4	3	0	0	100.0%
csmt	486	305	13	13	48	24	2	0	92.3%	11	7	0	0	1	0	0	0		13	10	0	0	0	0	0	0	
hazil's	29	27	0	0	6	6	0	0	100.0%	0	0	0	0	0	0	0	0		0	0	0	0	0	0	0	0	
elo	250	184	7	2	89	30	50	0	37.5%	2	2	0	0	1	0	1	0	0.0%	3	1	0	0	0	0	0	0	
hampr	1928	261	119	61	40	6	9	0	40.0%	72	9	3	2	0	0	0	0		86	11	4	3	1	0	0	0	

Per-Project Breakdown

Below the summary, each project is displayed individually with its own table. Each table lists **one row per agent** currently working that project, identified by their numeric **Agent ID** in the leftmost column. At the bottom of each table is a row labeled **SRVR**, which represents calls that were dispositioned automatically by the dialer before ever reaching an agent -- interviewers do not see these calls.

Project: hamp [\(Click Here To See Call Results Details\)](#)

Agent ID	Total									Current Hour									Previous Hour								
	Dialed	Connected	Dropped/DNOI	Refinsh (RH/SH/RR/DNC)	Resolved	Complete	Term	Over.Quota	Incidence	Dialed	Connected	Dropped/DNOI	Refinsh (RH/SH/RR/DNC)	Resolved	Complete	Term	Over.Quota	Incidence	Dialed	Connected	Dropped/DNOI	Refinsh (RH/SH/RR/DNC)	Resolved	Complete	Term	Over.Quota	Incidence
1005	44	36	8	10	3	1	1	0	50.0%	1	1	0	0	0	0	0	0		0	0	0	0	0	0	0	0	
1064	50	42	7	12	6	1	3	0	25.0%	2	2	0	1	0	0	0	0		1	1	0	1	0	0	0	0	
1065	11	9	2	2	4	0	1	0	0.0%	0	0	0	0	0	0	0	0		0	0	0	0	0	0	0	0	
1067	13	11	2	6	2	2	0	0	100.0%	0	0	0	0	0	0	0	0		0	0	0	0	0	0	0	0	
1164	71	14	57	7	0	0	0	0		0	0	0	0	0	0	0	0		2	0	2	0	0	0	0	0	
1171	58	36	19	0	7	1	2	0	33.3%	1	0	1	0	0	0	0	0		4	3	1	0	0	0	0	0	
1188	67	58	8	13	6	1	5	0	16.7%	2	0	2	0	0	0	0	0		4	4	0	1	0	0	0	0	
1269	53	32	21	7	0	0	0	0		1	1	0	0	0	0	0	0		2	1	1	1	0	0	0	0	
1331	58	45	10	1	2	0	2	0	0.0%	2	2	0	0	0	0	0	0		0	0	0	0	0	0	0	0	
1459	92	82	9	22	6	1	3	0	25.0%	3	3	0	1	0	0	0	0		2	2	0	0	0	0	0	0	
SRVR	2367	0	15	0	26	0	0	0		60	0	0	0	0	0	0	0		71	0	0	0	1	0	0	0	

Call Results Details

Next to each project name in the per-project breakdown is a ["Click here to see Call Results Details"](#) link. Clicking it opens a small pop-up window listing **every call result code recorded for that project since the start of the current day**, along with its count.

This is particularly useful when the **Resolved** column shows a high number -- the pop-up lets you quickly see which specific resolved codes are driving that count (for example, a spike in disconnected numbers, wrong numbers, or fax tones) without having to pull a separate report.

Call Summary for hamp

Disposition	Count
(101) No Answer	4
(104) Callback (Specified)	41
(105) Callback (Unspecified)	1
(107) Answering Machine/VM	216
(121) Dialer Dead Air/Sent Noone	144
(185) Respondent Hung Up in Intro (Bucket 9/Hold Area)	67
(189) Soft Refusal (Bucket 9/Hold Area)	11
(809) Dialer Disconnected (was 79)	26
(851) Dialer No Answer (was 101)	1155
(852) Dialer Busy (was 102)	5
(854) Dialer Trunk-line Busy (was 104 then 157)	37
(856) Dialer Nuisance Call (was 106)	15
(857) Dialer Answering Machine (was 107)	992
(870) Dialer Rejected Call	128
(871) Dialer NO User Responding	5
(873) Dialer Temp Failure	15
(875) Network Bad (likely temporary failure)	2
(994) Unknown	1
(001) Complete	7
(003) Language Barrier (Non-Spanish)	4
(005) Non Working	4
(009) Fax	1
(014) number Added to DNC List	1
(015) Respondent Hard Refusal or 2x Soft RF	2
(021) Question TQ (See Statcode in QPX)	10
(022) Question TQ (See Statcode in QPX)	5
(024) Question TQ (See Statcode in QPX)	1
(025) Question TQ (See Statcode in QPX)	1

Column Sets

Every row -- whether in the summary or the per-project breakdown -- displays three sets of columns: **Total**, **Current Hour**, and **Last Hour**. All three sets share the same column definitions, described below.

Column Definitions

The following columns appear under each of the three time-period sets.

Dialed

The total number of phone numbers attempted by the dialer or agents in 1:1 mode, regardless of how the call ended. Any number the system touched counts here.

Connected

The number of calls where a connection was established and the call was **passed to an agent or interviewer** to handle. A connected call means a live respondent (or answering machine) was reached and handed off.

Dropped / DNO1

A combined count of two related non-productive outcomes:

- **Dropped** -- calls where the dialer hung up before reaching 4 rings (dialer-initiated drop).
- **DNO1 (Dialer Sent No One)** -- calls where the respondent answered but hung up before the call could be connected to an available agent/interviewer. **These are a gray area, and could be confused with Respondent Hung Up During Intro*

Refusals

A combined count of respondents who declined participation, covering four specific disposition codes:

- **RHU** -- Respondent Hung Up during the introduction or screener text. **These are a gray area, and could be confused with Dialer Sent No One*
- **SRF** -- Soft Refusal (respondent declined but may be re-contacted).

- **HRF** -- Hard Refusal (respondent declined and should not be re-contacted).
- **DNC** -- Do Not Call (respondent requested to be added to the internal DNS/suppression list).

Resolved

The total count of numbers that have reached a **final, non-productive outcome** -- meaning the number is effectively dead and will not be redialed. This includes any disposition where no further contact attempt would be made, such as: Completes, Terms, Over Quotas, disconnected numbers, language barriers, fax/computer tones, wrong numbers, and similar unworkable results.

Complete

The number of interviews that were **fully completed** by a respondent who qualified and finished the entire survey.

Terms

Respondents who were **screened out** (terminated) during the interview because they did not qualify for the study based on the screener criteria.

Over Quota (OQ)

Respondents who qualified and would have completed the interview, but were **terminated because the quota cell they fell into was already full** at the time of their call.

Incidence

A calculated percentage representing the **rate at which willing respondents qualify and complete** the survey. The formula is:

$$\text{Incidence} = \text{Completes} / (\text{Completes} + \text{Terms} + \text{Over Quotas})$$

A higher incidence percentage means a larger share of respondents who engage with the survey are making it through to a complete. A lower incidence typically indicates heavy screening requirements or a difficult-to-reach target population.

Usage Notes

- This dashboard is intended for **monitoring active dialing sessions**. It is not a replacement for end-of-day or end-of-project reporting.
- Because the data refreshes every 15 seconds, numbers will shift during active calling hours -- especially in the **Current Hour** columns.
- The **Last Hour** columns provide a stable recent snapshot and can be useful for spotting trends or sudden changes in call patterns.
- If a project does not appear on the dashboard, confirm with programming staff that the project is actively loaded and dialing.

Dashboard Overview - INTV Realtime Report

Overview

The **Interviewer Dashboard (INTVDash)** is a real-time monitoring tool that displays live calling activity broken down by interviewer, for every active project currently running on the phone room floor. It is accessible to anyone on the internal network and requires no login.

INTVDash is located in the **Maxwell Portal**, under **PhoneOps Dashboard** in the left-hand navigation menu.

How It Works

The dashboard automatically refreshes every **15 seconds** and is active daily from **9:00 AM to 2:00 AM**. When multiple projects are running simultaneously, each project appears as its own table on the same page, stacked vertically. A **last update timestamp** is displayed at the top of the page, reflecting the most recent data received from the system.

If you need to pause and review the numbers more closely, a **Pause Refresh** drop-down is available at the top of the page. Clicking it stops the auto-refresh until you resume it.

Reading the Dashboard

Each project table is labeled with its **Job Name** and contains one row per interviewer currently or recently assigned to that project. The first row is always a **Shift Total**, which provides a rolled-up summary across all interviewers for that project.

Set Page Refresh Frequency: 10 second refresh There are 5 seconds left until page refresh.

Dashboard Report_v6 for 20260317 Updated 17 MAR 2026 17:03
Click on either the "Booth" or "Interviewer" or "Status" header to re-sort the order

Job Name:brz17s

Booth	Interviewer	Last Active/Status	Hours Logged	Production Time	Completes	Production Rate	Calls Made	Calls Per Hour	Calls Per Complete	LOI
000	Shift Total	N/A	2.67	2.67	6	2.25	29	11	5	18.08
1004	Christina Rodriguez	14:09 Quit	2.67	2.67	6	2.25	29	11	5	18.08

Job Name:clp

Booth	Interviewer	Last Active/Status	Hours Logged	Production Time	Completes	Production Rate	Calls Made	Calls Per Hour	Calls Per Complete	LOI
000	Shift Total	N/A	7.88	7.81	30	3.84	250	32	8	3.29
1064	Aida Santos	13:57 Quit	3.92	3.91	17	4.35	109	28	6	3.00
1171	Joanne Wilson	14:01 Quit	3.97	3.90	13	3.33	141	36	11	3.57

Job Name:csmt

Booth	Interviewer	Last Active/Status	Hours Logged	Production Time	Completes	Production Rate	Calls Made	Calls Per Hour	Calls Per Complete	LOI
000	Shift Total	N/A	15.05	13.97	28	2.00	716	51	26	7.87
1004	Christina Rodriguez	16:55 Quit	4.08	3.79	8	2.11	172	45	22	22.35
1039	Jamie Jaraczewski	16:54 Quit	6.89	6.15	12	1.95	295	48	25	8.31
1141	Sherre Duffin	16:14 Quit	4.08	4.03	8	1.99	249	62	31	8.68

Job Name:ets

Booth	Interviewer	Last Active/Status	Hours Logged	Production Time	Completes	Production Rate	Calls Made	Calls Per Hour	Calls Per Complete	LOI
000	Shift Total	N/A	29.25	25.66	98	3.82	692	27	7	3.60
1005	Lizcett Rivera	14:08 Quit	3.99	3.35	12	3.58	71	21	6	3.95
1065	Britney Beamon	14:02 Quit	3.59	2.59	11	4.25	41	16	4	5.90
1067	Linda Hall	13:59 Quit	3.98	3.76	18	4.79	104	28	6	3.28
1112	Anthony Mobley	13:02 Between Survey	2.01	2.01	17	8.46	60	30	4	7.93
1126	Nyasiah Sterling	13:02 Quit	3.03	2.86	4	1.40	30	10	8	7.39
1141	Sherre Duffin	12:06 Quit	1.93	1.69	7	4.14	43	25	6	6.70
1164	Denise Ireland	13:59 Break	3.53	3.06	11	3.59	165	54	15	8.14
1331	Elisabeth Ozuna	14:15 Quit	3.53	3.10	10	3.23	59	19	6	3.99
1459	Kaitlyn Geddes	14:04 Quit	3.66	3.25	8	2.46	119	37	15	3.08

Column Definitions

Column	Description
Booth	The interviewer's assigned booth number in the system.
Interviewer	The interviewer's name.
Last Active / Status	A timestamp and status code reflecting the last update received from that interviewer. See <i>Status Codes</i> below.
Hours Logged	Total hours the interviewer has been logged into the system during the current shift.

Column	Description
Production Time	Time spent actively in productive calling (excludes breaks, meetings, etc.).
Completes	Number of completed surveys recorded for this interviewer on this project.
Production Rate	Completes per production hour.
Calls Made	Total number of outbound calls placed by this interviewer.
Calls Per Hour	Average calls placed per production hour.
Calls Per Complete	Average number of calls required to achieve one complete.
LOI	Length of Interview -- the average duration (in minutes) of completed surveys for this interviewer.

Viewing Historical Reports

At the bottom of every INTVDash page, two navigation links are available:

[**Yesterday's Report \(20260316\)**](#)

[**Back to Most Current Report**](#)

- **Yesterday's Report (yyyymmdd)** -- Loads the report for the previous day. The date is shown in the link label so you always know which day you are navigating to.
- **Back to Most Current Report** -- Returns you to today's live, auto-refreshing dashboard.

Historical data is available going back weeks to months. If you want to jump directly to a specific date rather than clicking through day by day, you can manually enter the date into the browser's address bar using the following format:

```
/dashboard_report_20260315.html
```

Replace **20260315** with the date you want to view in **YYYYMMDD** format.

Row Color Coding

A dash (-) in any numeric column indicates a zero or null value -- no data recorded for that interviewer in that category yet.

- **White row** -- Interviewer is currently logged in and active on the project.
 - **Yellow row** -- Interviewer has logged out.
-

Status Codes

The **Last Active / Status** column displays the time of the last system update alongside one of the following status codes:

Status	Meaning
Dialing	Interviewer is actively dialing outbound calls.
Screening	Interviewer is on a call and going through the screener portion of the survey.
In Interview	Interviewer is actively conducting a survey interview.
Wrap Up	Interviewer has finished a call and is completing any post-call wrap-up steps before dialing again.
Between Survey	Interviewer is between calls, waiting to be connected to the next dial attempt.
Quit	Interviewer has exited the project. Row will appear yellow.
Unknown Status	Typically happens when an interviewer logs in, and immediate back out. The dashboard looks for information sent via the survey script, to fill the status. If they never load a survey, Unknown Status will be shown.
Meeting	Interviewer is in a meeting and temporarily away from dialing.
Lunch	Interviewer is on a lunch break.
Break	Interviewer is on a short break.

Dashboard Overview - Production Report

Realtime Production Report

The Realtime Production Report is the primary supervisory tool for monitoring project and interviewer performance during an active calling shift. It is the digital equivalent of walking the floor every hour to check on each interviewer's production -- except it updates automatically every 5 minutes.

The report runs daily from **9:00 AM to 2:00 AM** and auto-refreshes every **310 seconds** (5 minutes plus a 10-second buffer to allow for compile time) from the moment the page is first loaded.

This report is available to **all Portal users**.

Accessing the Report

The Realtime Production Report can be accessed two ways:

- Directly via browser URL
 - Through the MAXWell Portal dashboard link
-

Page Layout Overview

The report is organized into two levels: an **Overall Summary** at the top of the page, followed by individual **Per-Project Tables** for each active study.

Overall Summary Table

The top table displays a rolled-up view of all active projects combined, with one row per study plus a grand Total row. This gives supervisors an at-a-glance picture of how the entire shift is performing.

The Overall Summary shows **every hour of the day** across its hourly columns -- one column group per hour, from the start of the shift through the current time.

Clicking on a Project's name will jump you down to that project's agent specific table.

Study	Total									
	Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.	LOI
Total	163.75	11.97	151.78	278	1.83	57%	179	214	8.10	9.38
admintime	12.27	0	12.27	2	0.16	100%	0	0	0	2.28
bern	0.15	0	0.15	0	0	----	0	0	2.38	0
brz17ko	6.90	0.73	6.17	2	0.32	67%	4	1	0	16.13
brz17s	12.02	1.81	10.21	8	0.78	62%	3	5	0	24.51
clp	15.10	0.65	14.45	67	4.64	59%	3	47	0	4.05
ets	35.38	4.61	30.77	137	4.45	60%	55	90	0.13	4.02
hamp	81.93	4.18	77.76	61	0.78	46%	114	71	5.58	24.38

Per-Project Tables

Below the summary, each active project has its own table. These tables break down production to the individual interviewer level.

Within each project table, there are three category rows before the individual agent listings:

- **Total** -- Combined stats for all agents on the project (active and inactive)
- **Active*** -- Agents currently connected to this project
- **Inactive** -- Agents who have either switched to a different project or ended their shift for the day

Individual agent rows follow, sorted **alphabetically by last name** (displayed as Last, First). Each agent row is prefixed with the station number they logged into, enclosed in parentheses -- for example: **(1116*) Reyes Andrew**.

An **asterisk (*)** next to the station number indicates the agent is *currently connected* to the project.

On larger projects, the column header row will repeat after every 15th agent to make scrolling through long tables easier.

Project tables remain on the page for the full shift even after all agents on that project go inactive. The table will stop adding hourly columns at the last hour the project saw activity.

	Total									
Project: hamp	Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.	LOI
Total	81.93	4.18	77.76	61	0.78	46%	114	71	5.58	24.38
Inactive	81.93	4.18	77.76	61	0.78	46%	114	71	5.58	24.38
Active*	0	0	0	0	0	----	0	0	0	0
(1700) 1 Client	0	0	0	0	0	----	0	0	0.70	0
(1710) 10 Client	0	0	0	0	0	----	0	0	0	0
(1701) 2 Client	0	0	0	0	0	----	0	0	0.78	0
(1703) 3 Client	0	0	0	0	0	----	0	0	1.30	0
(1731) 31 Client	0	0	0	0	0	----	0	0	0	0
(1704) 4 Client	0	0	0	0	0	----	0	0	0.02	0
(1706) 40 Client	0	0	0	0	0	----	0	0	0	0
(1750) 50 Client	0	0	0	0	0	----	0	0	0.28	0
(1200) Bailey-Breiner Nicole	1.78	0	1.78	1	0.56	100%	2	0	0.02	19.62
(1745) Bartalis Timea	0	0	0	0	0	----	0	0	0.87	0
(1078) Cohen Martin	3.83	0	3.83	3	0.78	38%	0	5	0	21.45
(1188) Colon-Walsh Madison	2.73	0.13	2.61	0	0	0%	8	1	0	0
(1034) Cunningham Paige	3.57	0	3.57	2	0.56	20%	4	8	0.22	28.23
(1045) Deola Rita	2.87	0.09	2.78	3	1.08	75%	6	1	0	18.52
(1449) Dungee Toyea	2.98	0.15	2.83	4	1.41	67%	2	2	0	19.45
(1432) Emery Kathleen	3.87	0.48	3.39	0	0	0%	10	10	0	0
(1242) Emery Lisa	3.93	0.37	3.56	5	1.40	56%	2	4	0	23.64
(1192) Fleming Damir	3.98	0.49	3.49	2	0.57	100%	20	0	0	31.42
(1551) Goins William	4.12	0	4.12	4	0.97	40%	5	6	0	18.89
(1170) Gonzalez Nylah	3.87	0.31	3.55	3	0.84	60%	5	2	0.07	21.63
(1201) Graul Stephanie	2.05	0	2.05	4	1.95	100%	0	0	0	23.03
(1191) Harrison Phillip	2.93	0.31	2.62	2	0.76	100%	0	0	0	23.38
(1189) Jackson Candice	3.17	0.40	2.77	1	0.36	25%	2	3	0.18	26.17
	Total									
Project: hamp (continued)	Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.	LOI
(1039) Jaraczewski Jamie	3.95	0.17	3.78	3	0.79	43%	0	4	0	22.90
(1199) Keithley Gloria	3.62	0.17	3.45	5	1.45	71%	3	2	0	22.87
(1225) McCormick Kelly	3.47	0.02	3.45	3	0.87	50%	0	3	0	18.69
(a217) Mode Training	0	0	0	0	0	----	0	0	0.13	0
(1174) Nichols Angel	3.90	0.22	3.68	2	0.54	25%	9	6	0	20.21
(1155) Ortiz Frederick	2.98	0.05	2.93	3	1.02	38%	3	5	0	20.91
(1063) Parker Timothy	3.02	0.25	2.77	0	0	----	2	0	0.57	0
(1528) Pierce Sandra	3.83	0.22	3.62	5	1.38	63%	0	3	0	18.78
(1193) Ramos Emily	3.93	0	3.93	2	0.51	100%	20	0	0	18.20
(1160) Ross Jason	3.62	0	3.62	1	0.28	33%	1	2	0.40	39.83
(9006) Shutts Katrina	0	0	0	0	0	----	0	0	0	0
(1276) Wilson Shalonda	3.93	0.35	3.59	3	0.84	43%	10	4	0.05	25.51

[Back to Top](#)
[Time Detail Report](#)

Column Definitions

Each table contains a **Total** column group (cumulative for the full day) followed by individual **hourly column groups** -- one per hour the project was active. Both the Total and hourly groups share the same columns, with one exception noted below.

Hourly columns are arranged with the **most recent hour on the left**, scrolling right into earlier hours. This ensures the most current data is always visible when the page loads without scrolling.

Cells displaying ---- indicate there is no data available to calculate that value for that period.

Column	Description	Total	Hourly
Hours	Total hours logged. Includes both active time and break time.	Yes	Yes
Break	Time logged as Break, Lunch, or Meeting.	Yes	Yes
Active	Actual working time. Calculated as Hours minus Break.	Yes	Yes
Comp.	Number of completed surveys.	Yes	Yes
CPH	Completes Per Hour. Based on active (working) hours, not total hours logged.	Yes	Yes
Incid	Incidence rate. The percentage of contacts that resulted in a complete, calculated as: Completes / (Completes + Terminates + Over Quota).	Yes	Yes
Refusl	Total refusals of all types -- Soft Refusal, Hard Refusal, RHU (Refusal Hang-Up), and DNC (Do Not Call).	Yes	Yes
Terms	Survey terminates -- respondents who qualified to start the survey but did not complete it.	Yes	Yes
Prac.	Practice minutes logged. Reflects time an interviewer spent in practice/training mode.	Yes	Yes
LOI	Average Length of Interview, in minutes. Based on completed surveys only. Measures true survey time from introduction to last question -- does not include dialing or wrap-up time. <i>Total section only -- not shown in the hourly columns.</i>	Yes	No

Navigating Wide Tables

Because each project table grows a new column group for every active hour, tables can become quite wide -- especially later in the shift. A horizontal scrollbar appears beneath each table, allowing you to scroll right to view earlier hours. The most recent hour is always visible on the left

without scrolling.

Day Shift / Night Shift Breakdown

On weekdays after 5:00 PM, the report will automatically add two additional subtotal column sections to the **overall summary table** (not the individual per-project tables):

- **Day Shift** -- Production from 9:00 AM through 4:59 PM
- **Night Shift** -- Production from 5:00 PM onward

This is useful for comparing how each shift performed independently, without needing to manually separate the numbers.

Study		Total										Night Shift										Day Shift									
		Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.	LOI	Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.	Hours	Break	Active	Comp.	CPH	Incid	Refusl	Terms	Prac.		
Total admintime bern brz1/ko brz1/s clp ets hamp		163.75	11.97	151.78	278	1.83	57%	179	214	8.10	9.38	82.08	4.18	77.91	61	0.78	46%	114	71	1.70	81.67	7.79	73.88	217	2.94	60%	65	143	6.40		
		12.27	0	12.27	2	0.16	100%	0	0	0	2.28	0	0	0	0	0	----	0	0	0	12.27	0	12.27	2	0.16	100%	0	0	0		
		0.15	0	0.15	0	0	----	0	0	2.38	0	0.15	0	0.15	0	0	----	0	0	0.05	0	0	0	0	0	----	0	0	2.33		
		6.90	0.73	6.17	2	0.32	67%	4	1	0	16.13	0	0	0	0	0	----	0	0	0	6.90	0.73	6.17	2	0.32	67%	4	1	0		
		12.02	1.81	10.21	8	0.78	62%	3	5	0	24.51	0	0	0	0	0	----	0	0	0	12.02	1.81	10.21	8	0.78	62%	3	5	0		
	15.10	0.65	14.45	67	4.64	59%	3	47	0	4.05	0	0	0	0	0	----	0	0	0	15.10	0.65	14.45	67	4.64	59%	3	47	0			
	35.38	4.61	30.77	137	4.45	60%	55	90	0.13	4.02	0	0	0	0	0	----	0	0	0	35.38	4.61	30.77	137	4.45	60%	55	90	0.13			
	81.93	4.18	77.76	61	0.78	46%	114	71	5.58	24.38	81.93	4.18	77.76	61	0.78	46%	114	71	1.65	0	0	0	0	0	----	0	0	3.93			

Historical Navigation

Below the overall summary table, the page provides links to browse to previous or next day reports:

- **Yesterday's Report** -- navigates one day back
- **Next Day Report** -- navigates one day forward (when available)
- **Return to the most current report** -- jumps back to today

Previous day reports can also be accessed directly via URL. The format is:

report_YYYYMMDD_v2.html

For example, to view the report for March 17, 2026, you would navigate to:

report_20260317_v2.html

Time Detail Report

At the bottom of each per-project table is a link labeled **Time Detail Report**. Clicking this opens a new browser window showing a detailed punch card view for every agent on that project.

Each agent's Time Detail section includes:

- Login time
- Logout time
- Total minutes logged
- Break/Lunch minutes
- Completes during that session
- Any practice time during the login/logout window
- A total row summarizing all sessions for that agent

All login/logout sessions for a single agent are grouped together in succession, followed by a total row for that agent, before moving on to the next agent. The report is not sorted by time across all agents -- it is organized agent by agent.

ets Time Activity Report 20260316 Updated 17 MAR 2026 01:55							
(1065) Beamon Britney	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:14:13	10:19:23		0.0	0.0		5
	10:29:16	13:23:40	174	12.6	0.0	16	
	13:20:52	15:22:54	122	7.6	34.2	2	
Total			296	20.2	34.2	18	5
(1015) DeGarmo Stephanie	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:44:49	10:47:54		0.0	0.0		3
Total			0	0.0	0.0	0	3
(1067) Hall Linda	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:01:40	15:00:44	299	20.4	0.0	21	
Total			299	20.4	0.0	21	0
(1164) Ireland Denise	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:03:15	15:11:08	307	0.0	22.3	21	
	16:34:51	16:57:59	23	0.0	0.0	1	
Total			330	0.0	22.3	22	0
(1039) Jaraczewski Jamie	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	16:28:41	16:29:17	0	0.0	0.0	0	
Total			0	0.0	0.0	0	0
(1369) Miranda Emmanuel	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:04:29	14:48:54	284	25.6	34.3	17	
	16:29:44	16:56:09	26	0.0	0.0	2	
Total			310	25.6	34.3	19	0
(1331) Ozuna Elisabeth	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	12:30:54	14:50:40	139	19.4	0.0	8	
	16:33:42	16:56:38	22	0.0	0.0	1	
Total			161	19.4	0.0	9	0
(1116) Reyes Andrew	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:05:18	12:37:46	152	0.0	0.0	15	
	12:34:15	12:59:50	25	0.0	0.0	3	
Total			177	0.0	0.0	18	0
(1005) Rivera Lizcett	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:05:47	10:05:47	0	0.0	0.0	0	
	10:08:22	14:57:12	288	17.8	41.4	12	
Total			288	17.8	41.4	12	0
(1569) Vega Ashley	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:02:18	10:39:19	37	0.0	0.0	2	
Total			37	0.0	0.0	2	0
(1038) Washington Patricia	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	10:04:28	10:04:28	0	0.0	0.0	0	
	10:10:39	13:31:08	200	41.0	0.0	13	
Total			200	41.0	0.0	13	0
(1171) Wilson Joanne	Logon	Logoff	Minutes	Break	Lunch	Completes	Practice Minutes
	16:31:22	16:56:26	25	0.0	0.0	3	
Total			25	0.0	0.0	3	0

Known Behaviors and Quirks

Station Number vs. Agent ID

The number shown in parentheses before an agent's name is their **station number** -- the workstation or dial position they logged into -- *not* their agent ID number. While agents are generally expected to log into their assigned station, exceptions can occur due to file locks or login errors.

This is important to keep in mind if you use the browser's Find (Ctrl+F) to search for a specific agent ID and do not get a match. The report displays station numbers, not agent IDs.

Hour-Boundary Carry-Over

Because of how the report compiles session data, an agent who is mid-survey at the top of an hour may have their time split across two hourly buckets. For example, a session that starts at 1:51 PM and ends at 2:04 PM may show 49 minutes in the 1:00 PM column and 11 minutes in the 2:00 PM column. This can cause hourly CPH figures to appear slightly off.

This is expected behavior. **The overall totals will balance correctly by end of shift.**

Agent Sort Order

Agents are sorted alphabetically by last name and displayed in Last, First format.

Troubleshooting and Tips

A project is not showing up on the report

If a project just went active, it may not appear yet. The report compiles on a 5-minute cycle -- wait for the next refresh and check again.

The report shows no projects, or is showing old projects from a previous day

The shift has likely not started yet. The report does not clear until the new day's shift begins at 9:00 AM. Before that time, the previous day's report will still be displayed.

A note on LOI accuracy

The LOI (Length of Interview) value shown on the report is an **average of averages**, not a true weighted average. Each agent's average LOI is calculated individually, and those averages are then averaged together at the project level. This means the report LOI will typically be within 1-2 minutes of the true LOI, but will not exactly match the figures in nightly production reports.

Example:

Suppose two agents complete surveys:

- Agent A completes 10 surveys averaging **8 minutes** each
- Agent B completes 2 surveys averaging **14 minutes** each

True average: $(10 \times 8) + (2 \times 14) = 80 + 28 = 108$ total minutes / 12 surveys = **9.0 minutes**

Average of averages (what the report shows): $(8 + 14) / 2 = \mathbf{11.0}$ minutes

The difference is most noticeable when agents have significantly different survey volumes. For general monitoring purposes during a shift, the report LOI is a useful reference -- just don't use it as the authoritative figure for deliverables or client reporting.

How To: Caller ID/LCP Settings & Call Interceptor Program

CallerIDs/LCP & Call Interceptor System:

A How To Guide for PDs

The Realtime CallerID Adjustment System is the single, authoritative source for managing the outbound CallerID numbers used on your studies -- no more dropping or relaunching a job just to update the number list, and no separate Survox or MAXWell setup steps required.

When active on a study, this system controls the CallerID used on outbound calls in real time. Changes made here take effect on the very next call -- instantly, with no reload required.

Five modes are available per study, switchable any time:

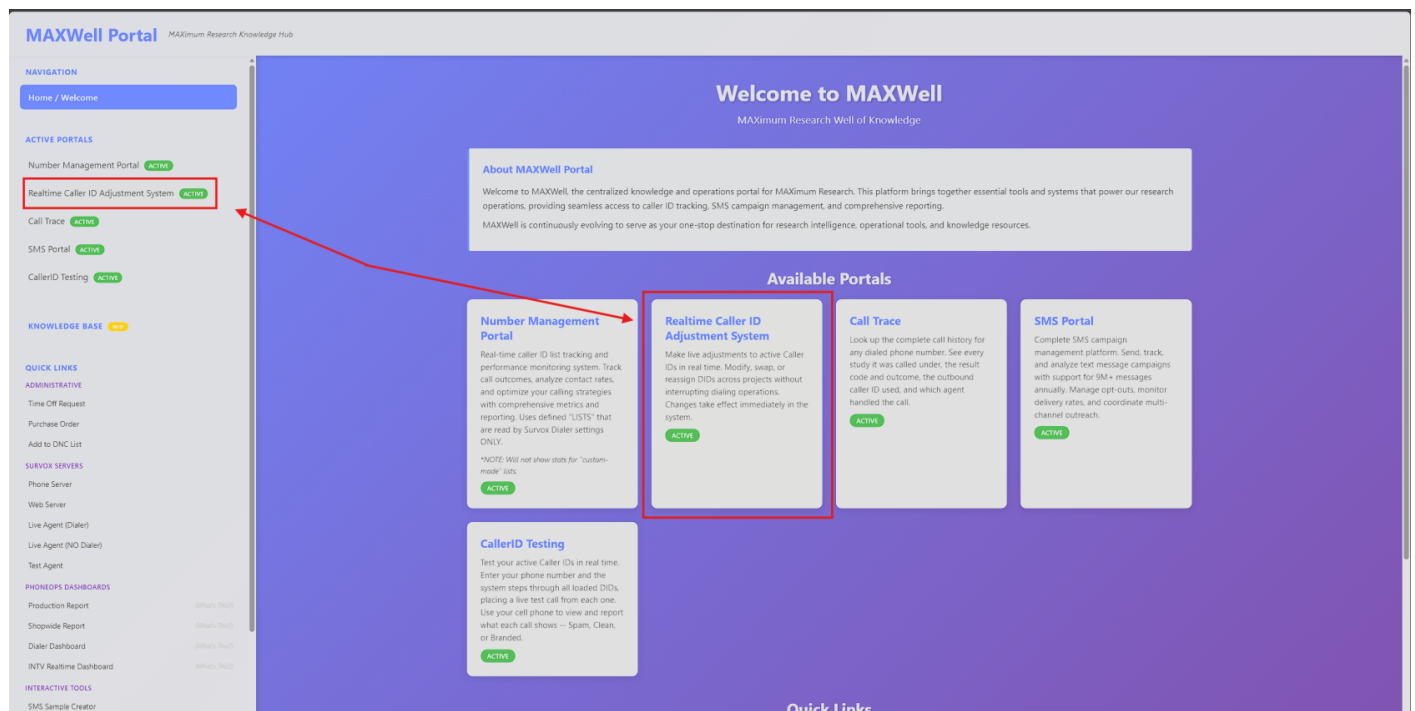
- **Use List** -- Rotates through the phone numbers you type in below, one per call, in the order you entered them.
- **Use LCP** -- Automatically picks a number that shares the same area code as the number being dialed, from the shared master list. No numbers to type in -- this list is maintained outside the portal.
- **Use TF** -- Rotates through the toll-free numbers in the shared master list. This is NOT a brand-new random pick on every call -- one random starting point is chosen, then it moves through the toll-free list in straight round-robin order call after call, the same way List mode does.
- **Use Random** -- Rotates through the non-toll-free numbers in the shared master list. Same as TF above -- NOT a brand-new random pick every call, just a random starting point followed by straight round-robin rotation through that list.
- **Disable (Use Survox List)** -- Turns rotation off for this study. Warning: this does not simply turn rotation off and leave your old CallerID behavior in place -- it will cause 856-874-9001 to be used as the CallerID for ALL calls in this study, unless a different number or list is set in the study's Dialer Config screen in Survox AND the study is reloaded.

Note: If a job does not exist yet in the Realtime CallerID Adjustment System, it will automatically be created once a call is dialed on it, and defaulted to LCP mode until it is set up with a different mode.

Switching between modes preserves your existing list in the background, so you can flip back and forth without losing your work.

Using the Realtime CallerID Adjustment System

In MAXWell, click on the "Realtime CallerID Adjustment System" menu/box.



CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

[Create New Job](#)[Edit Existing Job](#)

CallerID Selection Method

[Use List](#)[Use LCP](#)[Use TF](#)[Use Random](#)[Disable \(Use Survox\)](#)[What's the Difference?](#)

Study Name

Enter the study name exactly as it appears in Survox

Phone Numbers (one per line)

2015551234
2015555678
2015559012

Enter one phone number per line. No dashes or parentheses needed.

[Submit](#)

Create New Job / Edit Existing Job

Self-explanatory -- choose whichever applies to your situation. If your job does not exist yet in the system, it will be created automatically once a call is dialed on it, and defaulted to LCP mode until you set it up with a different mode.

Mode Selection

Choose the mode for the study: Use List, Use LCP, Use TF, Use Random, or Disable. See the mode descriptions above for details on each.

CallerID Selection Method

Use List

Use LCP

Use TF

Use Random

Disable (Use Survox)

What's the Difference?

Use List
Rotates through the phone numbers you type in below, one per call, in the order you entered them.

Use LCP
Automatically picks a number that shares the same area code as the number being dialed, from the shared master list. No numbers to type in -- this list is maintained outside the portal.

Use TF
Rotates through the toll-free numbers in the shared master list. This is NOT a brand-new random pick on every call -- one random starting point is chosen, then it moves through the toll-free list in straight round-robin order call after call, the same way List mode does.

Use Random
Rotates through the non-toll-free numbers in the shared master list. Same as TF above -- NOT a brand-new random pick every call, just a random starting point followed by straight round-robin rotation through that list.

Disable (Use Survox List)
Turns rotation off for this study. **Warning:** this does not simply turn rotation off and leave your old CallerID behavior in place -- it will cause 856-874-9001 to be used as the CallerID for ALL calls in this study, unless a different number or list is set in the study's Dialer Config screen in Survox AND the study is reloaded.

Study Name

This field MUST match the Survox study name letter for letter. Case does not matter.

If the Study Name does not match exactly, the system won't recognize it as the same job. Since the Interceptor auto-creates a job the moment a call is dialed, a mismatch results in TWO jobs existing for the same study -- the one you manually created, and a separate auto-generated one (defaulted to LCP) under the name Survox is actually sending. For example, if you create a job called "oh_state" but the Survox study name is actually "ohstate," you will end up with two separate jobs listed: your "oh_state" job, and an auto-generated "ohstate" job.

Phone Numbers

Paste in the actual numbers you want to use, one per row. This field is only valid if using "Use List" mode.

CallerID Selection Method

Use List	Use LCP	Use TF	Use Random	Disable (Use Survox)
----------	---------	--------	------------	----------------------

What's the Difference?

Study Name

csmt

Phone Numbers (one per line)

8884163094
8884163123
8884163135
6784480808
8339177143

Enter one phone number per line. No dashes or parentheses needed.

When you are happy with your selections, click the green "Submit" button at the bottom. Your new Interceptor task will be created and active immediately.

Edit Existing Job

The only real difference here is that the Study Name type-in box becomes a dropdown, letting you select an existing project. All other steps and notes covered above are the same.

CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

Create New Job	Edit Existing Job
----------------	-------------------

Select Existing Study

-- Choose a study --

There are 2 additional options available when editing an existing job:

CallerID Rotation Portal

Use this page to manage the phone numbers that get used as Caller ID when your study calls out. Changes you make here take effect on the very next call -- there is no need to reload or drop the study.

What would you like to do?

[Create New Job](#)[Edit Existing Job](#)

Select Existing Study

csmt

CallerID Selection Method

[Use List](#)[Use LCP](#)[Use TF](#)[Use Random](#)[Disable \(Use Survox\)](#)[What's the Difference?](#)

Study Name

csmt

Phone Numbers (one per line)

8884163094
8884163123
8884163135
6784480808
8339177143

Enter one phone number per line. No dashes or parentheses needed.

[Save List \(Download .txt Backup\)](#)[Submit](#)

Danger Zone

Use this only when a study is finished and no longer needs a CallerID rotation entry. This removes the study from the system entirely, and **it cannot be undone or restored**. Use the "Save List" button above first if you want to keep a backup copy of the numbers.

[Remove Study](#)

If you plan to remove a study, it's recommended to use Download List right beforehand to save a record of the settings -- though this is completely optional.

- **Download List** -- Creates a txt file for you to save when a project is done, so you can store the settings for later reference, should the job come back, or if someone asks how it was set up.
- **Remove Study** -- Completely DELETES the project from the Interceptor program. This should ONLY be done after a project has concluded fielding and is billed. Doing so helps keep the database at a minimum and running smoothly. *Note: If a study is removed prematurely, the system will only recreate the job (defaulting it back to LCP mode) once a call is actually dialed on it afterward.*

Notes

- Numbers and Mode changes are INSTANT, starting with the very next call.
- All changes are logged and stored for historic reference (Brian access needed to view logs).
- Adding a number into a list multiple times "weights" it, so it gets used more frequently.

Verifying Your Changes

To check your changes are working, you can view the Realtime Dashboard from MAXWell's Number Management Portal. You should see the changes reflected within a few minutes.

The screenshot displays the MAXWell Number Management Portal interface. On the left is a sidebar with navigation links under categories like 'ACTIVE PORTALS', 'KNOWLEDGE BASE', 'QUICK LINKS', 'SURVOX SERVERS', and 'PHONEOPS DASHBOARDS'. The 'Number Management Portal' is marked as 'ACTIVE'. A red arrow points from this link to a red box in the main content area. The main content area is titled 'System Overview' and includes four summary cards: 'TOTAL CALL RECORDS' (4,937,743), 'ACTIVE LISTS' (70), 'UNIQUE CALLER IDS' (1,655), and 'DATA RANGE' (02/04/2026 to 07/30/2026). Below these is a 'Last Nightly Import: SUCCESS' status. The 'Project Contact Rate Reports' section contains four reports: 'Real-Time Contact Rate Dashboard' (highlighted with a red box), 'Hourly CID Contact Rate Tracker', 'TF vs LCP Connect Rate Tracker', and 'Weekly CID Calls Tracker'. Each report has a 'View Report' button.

- If you switched modes or added new numbers to a List, you should start seeing new numbers appear with calls from them in the table for the study.
- If you removed a number from a List, or switched away from a mode, the numbers no longer in use should stop incrementing shortly (calls still live from before the change can still cause minor increases).

LACH26CEAnchorDials: 2,979 | Agents: 19 | Connects: 2,579 | Contacts: 375 | Rate: 12.6%

CallerID	TOTAL					21:00 - 22:00 (Hourly)					21:40 - 21:50					21:30 - 21:40					21:20 - 21:30					21:10 - 21:20					
	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	
TOTAL	2,979	19	2,579	375	12.6%	260	5	224	36	13.8%	12	3	10	4	33.3%	70	5	58	10	14.3%	65	5	54	12	18.5%	61	5	5	11	4	18.2%
8184959165	488	19	427	57	11.7%	43	5	35	10	23.3%	3	2	3	2	66.7%	11	5	9	2	18.2%	11	5	7	3	27.3%	11	4	4	10	4	25.0%
4243196369	504	19	431	64	12.7%	44	5	41	7	15.9%	2	2	2	0	0%	13	4	13	2	15.4%	10	5	8	3	30%	10	4	4	10	4	20%
3236214483	494	19	415	55	11.1%	44	5	35	4	9.1%	2	2	2	1	50%	10	4	9	2	20%	12	4	7	1	8.3%	11	4	4	10	4	20%
3418992265	493	18	431	56	11.4%	40	5	34	3	7.5%	2	1	1	0	0%	10	5	7	1	10%	10	5	10	2	20%	9	4	4	10	4	20%
5627170184	493	19	439	78	15.8%	45	5	41	7	15.6%	2	1	2	1	50%	13	5	10	1	7.7%	12	4	12	2	16.7%	10	3	4	10	4	20%
7144506544	507	18	436	65	12.8%	44	5	38	5	11.4%	1	1	0	0	0%	13	5	10	2	15.4%	10	4	10	1	10%	10	4	4	10	4	20%

LACH26AEAnchorDials: 1,264 | Agents: 7 | Connects: 1,102 | Contacts: 168 | Rate: 13.3%

CallerID	TOTAL					21:00 - 22:00 (Hourly)					21:50 - 22:00					21:40 - 21:50					21:30 - 21:40					21:20 - 21:30					
	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	Dials	Agents	Connects	Contacts	Rate	
TOTAL	1,264	7	1,102	168	13.3%	349	7	313	41	11.7%	25	5	20	3	12%	46	5	43	6	13%	58	6	50	4	6.9%	72	7	6	10	4	13.3%
2138347076	186	7	163	24	12.9%	51	7	45	4	7.8%	4	3	4	0	0%	8	4	8	0	0%	6	4	5	0	0%	11	7	1	10	4	13.3%
6503701024	185	7	158	16	8.6%	54	7	48	5	9.3%	4	3	3	0	0%	7	5	6	1	14.3%	8	4	8	0	0%	11	6	1	10	4	13.3%
3236125375	183	7	156	37	20.2%	52	7	45	8	15.4%	4	3	3	2	50%	6	3	5	1	16.7%	9	4	7	0	0%	11	6	1	10	4	13.3%
4405511270	181	7	165	29	16%	50	7	46	6	12%	4	3	4	0	0%	7	4	7	1	14.3%	8	5	7	1	12.5%	10	5	1	10	4	13.3%
9097476729	179	7	154	22	12.3%	47	7	38	7	14.9%	4	3	2	0	0%	6	3	6	1	16.7%	8	5	5	0	0%	9	6	8	10	4	13.3%
6289002317	174	7	150	17	9.8%	49	6	47	4	8.2%	3	2	2	0	0%	6	4	6	1	16.7%	9	5	9	1	11.1%	10	5	1	10	4	13.3%
8183382776	176	7	156	23	13.1%	46	7	44	7	15.2%	2	1	2	1	50%	6	4	5	1	16.7%	10	4	9	2	20%	10	5	1	10	4	13.3%

Common Problems Q&A

Q: I created a job, but the calls are still using the wrong CallerIDs. What happened?

A: This is almost always a Study Name mismatch. Since the system auto-creates a job the moment a call is dialed, a mismatch results in TWO jobs existing for the study -- the one you manually created, and a separate auto-generated one (defaulted to LCP) under the name Survox is actually sending. Double check the dropdown/job list for a similarly-named duplicate job.

Q: What actually happens if I use Disable mode?

A: All calls on that study will use 856-874-9001 as the CallerID -- this is not the same as "leaving CallerID behavior alone." This should be avoided in almost all cases. If you do need to use it intentionally, a list must also be set in the study's Dialer Config screen in Survox, AND the study must be reloaded, or every call will go out on 856-874-9001.

Q: What's the difference between Use TF and Use Random?

A: Use TF rotates through the toll-free numbers in the shared master list; Use Random rotates through the non-toll-free numbers in that same list. Neither one picks a brand-new random number on every call -- each picks one random starting point, then moves through its list in straight round-robin order from there, the same way List mode does. Note: switching modes resets the last number used, so if you switch back to either of these modes later, it could start at a different spot in the list.

Q: When should I use Remove Study?

A: Only after a project has finished fielding and has been billed. It's a good idea to use Download List first to save a copy of the settings before removing. If a study is removed prematurely, the system will simply recreate the job (defaulted back to LCP mode) the next time a call is actually dialed on it.

Q: When should I create my Study?

A: Unlike survox, you can make these projects at anytime, as long as you know what the

programmer is using as the studycode.