

Field Agent Checklist

Informant _____ Field Agent _____

Folder Name _____ Interview Date _____ Total Number of Names _____

Before The Interview

- ☐ The phone battery is sufficiently charged
- ☐ The mobile app is updated to the newest version
- ☐ The phone has enough memory for the interview

After The Interview

- ☐ Names written on Interview Collection Form are as mentioned by Informant
- ☐ Checked for spelling and gender errors
- ☐ Audio is authentic and of good quality
- ☐ Family Story is authentic and of good quality
- ☐ Pictures are appropriate and of high quality
- ☐ Authorization form is signed by informant
- ☐ Interview Collection Form is authentic and fully completed
- ☐ Interview information is accurate

Field Manager Checklist

Field Agent _____ Field Manager _____

Folder Name _____ Interview Date _____ Total Number of Names _____

- ☐ Verified audio recording
- ☐ Verified the Name Collection Form was completed correctly
- ☐ Verified total names is correct (write total names counted here) _____
- ☐ Verified the Authorization Form is signed and of good quality
- ☐ Name on Authorization Form matches the Mobile App
- ☐ Listened to the Informant repeat from memory several random names
- ☐ Verified photos were taken and of good quality

Data Entry Clerk Checklist

Field Agent _____ Data Entry Clerk _____

Folder Name _____ Interview Date _____

- ☐ Verified Legacy does not have more names than the Name Collection Form
- ☐ First Ancestor is found in Legacy and Name Collection Form
- ☐ Informant is found in Legacy and Name Collection Form
- ☐ Genders are accurate in Legacy and Name Collection Form
- ☐ All necessary estimates are completed
- ☐ Checked for spelling errors
- ☐ Relationships in Name Collection Form match Legacy

Data Entry Clerk Supervisor Checklist

Data Entry Clerk _____ DE Manager _____

Folder Name _____ Interview Date _____

- ☐ Verified Legacy does not have more names than the Name Collection Form
- ☐ Verified all other items on Data Entry Clerk checklists were correctly completed
- ☐ There was only one handwriting on the Name Collection Form

Production Manager Checklist

Field Manager _____ DE Manager _____

Production Manager _____ Folder Name _____

Before ROC Submission

- ☐ Reviewed interview folder & checklists submitted by the Field Manager to ensure quality
- ☐ Reviewed interview folder & checklists submitted by the Data Entry Supervisor to ensure quality
- ☐ Verified all interview items including PDFs of Name Collection Form are of good quality

After ROC Submission

- ☐ Interview folder submitted to the ROC
- ☐ Interview folder accepted by the ROC

After Payment is Received

- ☐ Interview Booklet is printed
- ☐ Interview Booklet matches Legacy and Name Collection Form
- ☐ Interview Booklet is delivered Date of Delivery _____
- ☐ The Interview Folder (Name Collection Form, Authorization Form, Checklists, Zipped Folder) is securely archived with easy access for audit purposes

Production Manager Signature _____ Date _____