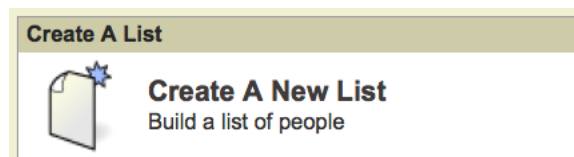# Creating A List, Printing and Data Entry

Call sheets are a versatile way to get a lot of people to make a lot of phone calls, and all you need is a phone unlike a Virtual Phone Bank (VPB), where you need a computer and SmartVAN account for each person making calls. The call sheet displays some basic information about the person being called, as well as their current phone number and sections to mark the results of the calls. Data Entry comes after the calls are finished, using a tool that resembles the list itself.

This guide will cover how to pull a typical list, how to print the list correctly and how to get the information from your calls back into the system. Keep in mind that the list you use to create a call list should NEVER be the same list used for a VPB at the same time. Call sheets will display people in the sort order chosen when the list is created, which should generally not be changed from the defaults. Data Entry of those calls should be done the same night if possible so the Targets will update using the new information, or within 24 hours when that is not possible.

Creating a typical list:

In most cases, lists created in SmartVAN require two key pieces of information: what location is being called, and what sort of people you are trying to reach out to. To create that list, click on Create a New List from the main menu of SmartVAN.

Location: In many states, location is specified using region/chapter/team names, under the "OFA Region", "OFA Chapter" and "OFA Team" labels – in others, those turfs are still being defined and Counties or Cities are used in their place. Select the location being called.

Targets: These are subdivisions of people to be called based on what we know about their involvement with Organizing for Action and past activity during 2012. Hot Leads are either recent online signups, on a volunteer and/or issue-specific form, or people who recently said they wanted to volunteer on a call, while active volunteers have attended events and prospects are people that have not been engaged much yet this year. Generally pull targets separate from each other to make more specific asks and to call through the best list first.

A sample selection set is shown below – when done, click Search in the upper right.

Printing a list to a PDF file

Once you have your list generated, you will arrive at the My List screen, or from the main menu, click Go to My List. Click the Print icon above the list, under Add People →

You will have a variety of report formats and scripts available to you for printing – which one you choose will depend what criteria you used to pull your list, such as issue-specific options used with issue-specific targets, though generic volunteer recruitment versions are available. Most of the report formats are similar and only differ in what script they bring up by default.

Once on the print screen, choose the report format for your list. Using the example calls shown above (CIR Hot Leads), you would select **!OFA Comprehensive Immigration Reform (CIR)**. The script should be automatically chosen for you, in this case with a very similar name.

Also pre-selected will be Contacted How and a default sort order – you should not change these from the defaults because this order will appear when setting up Grid View for data entry.

Give your sheet a useful title (such as Location, Target, Date) – it appears that way in the PDF file list and at the bottom of printed lists, allowing for easy recognition among other call sheets.

Always leave Print List Number and Page Number checked – you will need it for the data entry!

Report Format	!OFA Volunteer Recruitment Call List ▼	*
Script	OFA Volunteer Recruitment Script ▼	
Contacted How	Phone ▼	*
Title	Tampa Bay Hot Leads 1/14	
	Clear Sort Order	

Sort Order1	County ▼	⦿ Ascending ○ Descending	☐ Show Group Header	☐ Page Breaks
Sort Order2	Precinct ▼	⦿ Ascending ○ Descending	☐ Show Group Header	☐ Page Breaks
Sort Order3	Phone Number ▼	⦿ Ascending ○ Descending	☐ Show Group Header	☐ Page Breaks
Sort Order4	Name ▼	⦿ Ascending ○ Descending	☐ Show Group Header	☐ Page Breaks

When done, click Next, wait a few seconds, and click My PDF Files (also available from the main menu on the far left). The list of files is sorted by date, so the most recent list will be at the top. ***PDFs cannot be data entered after 30 days – keep your lists current and enter them quickly!***

PDF Printing Instructions

						Download Selected Files	
☐	**Title**	**Type**	**Created** **Created By**	**File Size**	**Committee**	**Download Link**	**Delete**
☐	Tampa Bay Hot Leads 1/14	List	1/15/14 4:52 PM Mounce, Bianca	76 KB	OFA 4.0	Download File	Delete
1 PDF Print Job · 1 Page							

Anatomy of a Printed Call Sheet:

Once you have the file downloaded, the sheet will begin with the script you selected and follow with call sheets listing the people on the list. That sheet should look similar to this:

ORGANIZING FOR ACTION

ID: 100287534 #: (215) 885-4402
Miller, Margery (68 F D)
1334 Barrowdale Rd
Rydal, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101236332 #: (215) 885-5625
Wirtshafter, Robert M (60 M D)
1428 Cloverly Ln
Jenkintown, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101661030 #: (215) 266-6995
Weitzman, Lisa (52 F D)
1215 Gilbert Rd
Meadowbrook, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100814376 #: (215) 886-1625
Cohen, Elaine C (79 F D)
1372 Meetinghouse Rd
Meadowbrook, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101213951 #: (215) 576-5802
Schwartz-Donahue, Janice (65 F D)
757 Suffolk Rd
Jenkintown, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100663165 #: (215) 310-8910
Elsekheily, Margaret (D)
916 Township Line Rd
Elkins Park, PA 19027
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100126295 #: (267) 615-1211
Palmer, Peggy A (65 F D)
1660 Park Ave
Willow Grove, PA 19090
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100273523 #: (215) 881-8520
Prybutok, Marsha (65 F D)
1426 Autumn Rd
Jenkintown, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100359803 #: (215) 885-7950
Landau, Rebecca (66 F D)
739 Baeder Rd
Jenkintown, PA 19046
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 102042784 #: (267) 287-8223
Joyce, Kathleen M (50 F D)
652 Hamel Ave
Glenside, PA 19038
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101867616 #: (215) 659-6267
Hoeffel, Joseph M (62 M D)
1908 Lycoming Ave
Abington, PA 19001
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101587730 #: (215) 885-3284
Reimer, Kurt ( )
2450 Lafayette Ave
Abington, PA 19001
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 101628365 #: (215) 885-3284
Scott-Reimer, Lisa A (48 F D)
2450 Lafayette Ave
Roslyn, PA 19001
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

ID: 100591897 #: (215) 603-7774
Deininger, Nancy (52 F D)
156 Tennis Ave
Ambler, PA 19002
NH BZ CB RF MV WN SP DEC
Volunteer: ☐Yes ☐No ☐Later
Call Elect: ☐Yes ☐No ☐Maybe
Attend Event: ☐Yes ☐No
Issues: ☐Climate ☐Tax Fairness ☐Immigration ☐Health Care ☐Gun Violence ☐_____
Email: _____
Notes:

On the far left, the information about the person is displayed including name, address, phone number, and also the person's unique My Campaign ID, which can be used to locate them very quickly via Quick Look Up, but also to navigate to that person in Grid View.

To the immediate right of the person information are call result abbreviations – these are only used when the person on the list is not contacted, or does not answer any of the questions to the right of those results. To the right, questions include:

Volunteer – whether the person wants to volunteer with OFA beyond a specific event ask
Do not mark NO if they only say they cannot attend a specific event, *but mark yes if they will*

Call Elect – whether the person will commit to call their elected official about the issue

Attend Event – whether the person can attend a specific event, with space to write in the event

Issues – which issues the person cares about, used to direct people in Targets & Leadership tags

Finally, at the bottom of the page is the name of the list and list number. That list number is needed to load the list back into Grid View, and will not function after 30 days.