

SURVEY INTERVIEW

EXAMPLE QUESTION

- SURVEY**
- Each Survey Question is titled, numbered and listed along the left pane.
 - Click on the title to open the question.
 - Question appears in center pane at the top with the answer section below.
 - Some questions may have pick lists to choose from.
 - Some questions may require input of a serial number or network drive information.
 - When question is complete, the check mark will turn green.
 - When all questions are completed, click on Complete Survey in upper right corner.

ASSESSMENT INTERVIEW

ASSESSMENT PRE-INTERVIEW

- Assessment can be configured with pre-interview questions designed to validate qualifying information from the custodian.
- This example contains 2 qualifying questions: Hire date and Position.
- Once these questions are answered the link to the Custodian Assessment activates.

- ASSESSMENT INTERVIEW**
- The Assessment consists of a series of questions, custom designed to identify the Custodian's relative knowledge of and involvement in the matter as well as the materiality of data in their possession.
- The goal of the Assessment is two fold:
- Confirm the Retain or Release status of the custodian.
 - Assign a Custodian Rank based on their answers.
 - Each question of the Assessment is scored and contributes to the retain/release recommendation and the overall RANK for the custodian.