

Schedule for End-of-Year (4th Quarter) PY 19-20 WIOA, Title II Employment and Earnings Survey

Background: OCTAE requires all funded Adult Education programs to follow up twice on all students who exit their program: at 2 quarters (between 90 and 180 days) and 4 quarters (between 270 and 365 days) after exit.

Purpose: This document provides dates and steps to follow during End-of Year (4th Qtr. : April-June) of PY 19-20.

Key Dates and Tasks:

Dates	Task	Reference/Notes
April	Save Exit Population for PY 19-20 Qtr. 2	See "Preparing your data" and "Step 1" below
April - May	Send 1 st Survey Invite to all PY 18-19 Qtr. 4 Exiters	Since this is for 4 Qtrs. after exit, TE will send this 1st invite automatically
April - May	Send 1 st Survey Invite to all PY 19-20 Qtr. 2 Exiters	See "Step 2" below.
May - June	Send 2 nd and 3 rd Survey Invites to all non-responders	See page 6 of Guide to Implement Follow Up Survey
June	Contact 3-time non-responders via phone, postcard, etc.	See "Step 3" below.
July	Grace period for sending invites	You can continue entering survey responses after the grace period, but you cannot send survey invitations

Preparing your data

Finish entering and cleaning all attendance hours for the first quarter of the current program year.

Optionally, you can check for students who are marked "Retained in Program" since those will not be considered for exit population.

- 1) Go to Records → Programs → Enrollments
- 2) Click the small funnel Filter button in the Program Status column header
- 3) Check the box for "Retained in Program" and click OK

Afterwards, you should run the NRS Core Performance Report to find and correct obvious mistakes in email addresses and missing cell phone numbers.

Since we're in the 4th quarter of this Program Year (19-20), we need to look back to the 2nd quarter (two quarters back) and get the list of students who exited.

- 4) Go to Reports → Federal Reports → NRS Core Performance Population
- 5) Select PY 19-20 and the 2nd quarter for this PY.
- 6) Generate

You can **Export** this to Excel, or a PDF file if you wish.

Now you can follow the steps below to save your exit population for the second quarter of the current program year and send them invitations to be surveyed now, in the current quarter, and also to be surveyed in two quarters from now.

Step 1: SAVE your exit population

Example: In May 2020, SAVE your exit population from PY 19-20 Q2.

- 1) Go to Tools → NRS Core Performance Wizard, leave the current PY selected. Click Next and select 2nd quarter (if not already selected). We're currently interested only in this quarter. Click Next again to generate the report.
- 2) The list of students is displayed (just like in the report we ran at step #2). Click Next, note that, once generated, the wizard cannot run again for the same quarter, then click Finish to save the list of students that need to be followed-up.
- 3) To view the results, go to Records → NRS Core Performance Students. The lister is filtered by default for Exit Quarter set to "Two Quarters Back" which is exactly what we need. This is the list of students for which a survey invitation needs to be sent.

Note: The earliest you could save this Q2 exit population is April 1. It is recommended that you save it by April 30 so you have plenty of time for sending survey invitations and getting responses. The final allowable date to save the Q2 exit population is June 30.

Step 2: SEND surveys



Example: In May 2020, SURVEY your population you created for PY 19-20 Q2 (two quarters prior):

- 1) Select all students in the NRS Core Performance Students lister and click the Send Survey Invitations button in the toolbar. The Survey Wizard will start. (Note: you may want to select subsets of students based on native language since TE has a survey translation. See Steps 4-5 on Page 3 of the "Guide to Implement Follow Up Survey" at casas.org → California Adult Education Accountability an Assessment → California Employment Follow Up Survey for additional instructions on how to select a subset of students).
- 2) Follow the on-screen directions and go through the wizard steps. After selecting the survey language and delivery method, note the screen with the dates when the application should start sending surveys and when those invitations expire.

Select Invitation Delivery Date for Second Quarter after Exit: Select Invitation Expiration Date for Second Quarter after Exit:

A. The first date is for the "Second Quarter after Exit", and that means the current quarter (we're in Q4 and the student exited in Q2). This also means that the default date displayed is today. You can choose another date but no sooner than "today" and no later than the date when the survey invitation is set to expire.

B. - The second date is when the survey invitation for the current quarter will expire if it has not been opened / answered.

Select Invitation Delivery Date for Fourth Quarter after Exit: 11/6/2020  Select Invitation Expiration Date for Fourth Quarter after Exit: 2/1/2021 

A. The first date in the second row is for the “Fourth Quarter after Exit” and that means Q2 in the next Program Year. A default date value is set. You can choose another date but no sooner than the first day of the next Program Year (7/1/2020) or later than the date when the survey invitation is set to expire.

B. The second date in the second row is when the survey invitation for the 2nd quarter of the next Program Year will expire if it has not been opened / answered.

3) Complete the wizard.

Also, in May 2020, re-SURVEY your population from PY 18-19 Q4 (four quarters prior):

4) Go to Records → Survey Responses lister. The default filter for Quarter to Take Survey is set to “Current Quarter”. Please keep an eye also on the Exit Quarter column because in the current quarter we’ll see surveys from both those that exited two quarters back and also four quarters back. We can manually filter the Exit Quarter to show only students that exited in a specific quarter.

5) From this lister, you can select the student(s) who have not responded to the survey by filtering the Survey Responded column and select “No.” To resend this group survey invitations, select the student(s) who have not responded and click the Resend Survey Invitations button in the toolbar. TE will open the Survey Wizard and help you resend survey invitations.

Note: Duplicate entries for students will not result in multiple copies of the survey invitation being sent. TOPSPro Enterprise will remove those duplicates before sending the survey invitations.


6) Do nothing if invitations were already sent for the second quarter after exit (see columns including Delivery Status, Survey Accessed, and Survey Responded) (this happened in step 2 above – 4th quarter invitations are sent automatically)

Please note that the following steps need to be performed only if survey invitations were never sent for two quarters after exit.

7) Otherwise go to Records -> NRS Core Performance Students. The lister is filtered by Exit Quarter set to “Two Quarters Back” and we need to change it. Click on the Exit Quarter filter on the column and select “Four Quarters Back”. Uncheck the box for “Two Quarters Back” and click OK. Now the students displayed in the list are those that exited four quarters back and we can send invitations to them.


8) Select one or multiple students from the lister and click the Send Survey Invitations button in the toolbar. The Survey Wizard will start.

9) Follow on-screen directions and go through the wizard steps. After selecting the survey language and delivery method, note the screen with the dates when the application should start sending surveys and when those invitations expire.

Select Invitation Delivery Date for Fourth Quarter after Exit: 5/7/2020 

- Notice that only one date is displayed which is for delivery date for “Fourth Quarter After Exit.” This is because this is the maximum length of quarters and we’re already past the point where invitations for second quarter after exit (for these students) could be sent. This also means that

the default date displayed is today. You can choose another date but no sooner than “today” and no later than the date when the survey invitation is set to expire.

Select Invitation Expiration Date for Fourth Quarter after Exit: 8/1/2020 

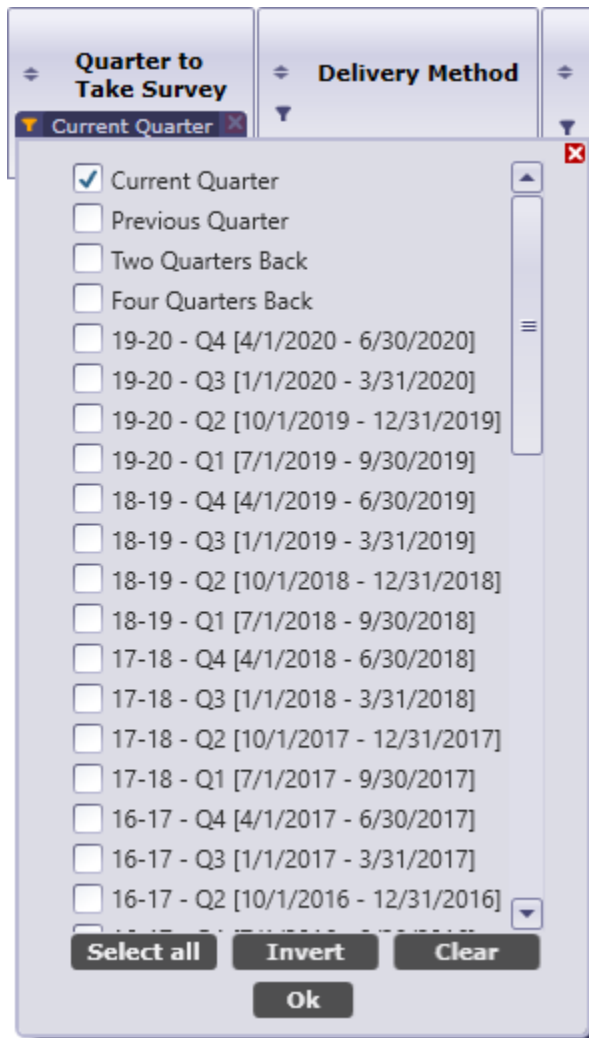
- The date is when the survey invitation for the current quarter (four quarters after exit) will expire if it has not been opened / answered.

10) Complete the wizard.

Step 3: VIEW current quarter invitations

Now that the invitations have been sent to students, we can see the invitations and their status from Records → Invitations.

1. The lister is filtered by default to show invitations for the current quarter. This means the students are those that exited in the 2nd quarter of the current PY or 4th quarter of the previous PY.
2. We can see the date when the invitation was sent in the Date to Send Invitation column and if the invitation has been successfully sent to the student in the Delivery Status column.
3. We can also see if the survey was accessed (student has clicked on the survey link) in the Was Accessed column and also when the invitation will expire in Date When Invitation Expire column. This is important to note because another invitation may need to be sent after the initial ones expired.
4. We can also view the invitations that will be sent for the 2nd quarter of PY 20-21 (since the survey wizard has already prepared the records) by changing the Quarter to Take Survey column filter. Instead of “Current Quarter” (or 19-20 – Q4, since it’s the same in this case), select “20-21 – Q2”. Notice that these invitations will still have the status “Pending” because the date to send the invitation is still in the future.



5. Please keep an eye on the Date when Invitation Expires. Once the invitation expires, we need to manually send a second or third invitation. To do that, select the student(s) for which the survey invitation has expired and click the Resend Survey Invitations button in the toolbar. TE will open the Survey Wizard and help you resend survey invitations with a new expiration date for invitations that have expired.

Step 4: Personally contact students who don't respond

Under Records → Survey Responses you will find all the students who have not responded to survey invitations. You can open any record to access the student's phone number and complete the survey while you are on the phone with the student.

Student ID	Name	Quarter to Take Survey	Exit Quarter	Delivery Status	Survey Accessed	Survey Responded
0000296732	Jeanette Oanh Nguy	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000401071	ALFONSO VALENCIA	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000523724	Lila M. Rider	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000551138	Maria Luisa Cruz	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000626522	Salvador Rubio Lopez	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000642184	Ramon Cruz Coronel	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000654535	Emilia Ruiz Guzman	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000714232	ISABEL CHAVARIN	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000740387	Maria De La Luz Solis	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000773016	ZEINEB REDIE	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000788132	Sarai Sosa Gonzalez	19-20 - Q3	19-20 - Q1	Delivered	No	No
0000790671	CARMINA MENDOZA	19-20 - Q3	19-20 - Q1	Delivered	No	No

Survey

Quarter to Take Survey: 19-20 - Q3 Exit Quarter: 19-20 - Q1

Delivery Status: Delivered Survey Accessed: No Survey Responded: No

Sent to Portal On: 2/19/2020 Updated from Portal On: 2/19/2020

Contact Status: Not Yet Contacted Contact Notes:

Survey Items

Item Responses	#	Item Name	Item Prompt	Was Answered	Answer
	1	Labor Force Status	Do you have a job now?	<input type="checkbox"/>	
	2	Monthly Income	How much do you usually earn in one month?	<input type="checkbox"/>	
	3	Different School Attendance	Are you attending school in a different area?	<input type="checkbox"/>	
	4	School Name	What school do you attend now?	<input type="checkbox"/>	

Student

Full Name: Cyrus Lins Email: Cyr_Lins17@rhas.edu

Phone: (170) 562-6396 Cell Phone: (170) 562-6396

Interact with Student Portal **Answer survey** Get item responses

Question: Is there a limit on the number of survey invitations we can send to students?

For text messages there is a limit of 3 invitations, and no limit for emails. If you have an exceptional situation wherein you need more than 3 text messages per student please contact Tech Support.

Question: When do we contact students who do not respond to the survey?

You may contact students during the quarter in which you are sending survey invitations to them, and up to one month after the current survey quarter ends.

See “Guide to Implement Follow Up Survey” on www.casas.org for full details.

[Home](#) > [Training and Support](#) > [CASAS Peer Communities](#) > [California Adult Education Accountability and Assessment](#) > CA Employment Follow Up Survey