

First Quarter PY 2021-22 Task Schedule California WIOA, Title II Employment and Earnings Survey

This document provides suggested dates and necessary tasks to complete the Employment and Earnings Survey Requirement for California WIOA Title II: AEFLA agencies. Steps for this quarter should be completed between July 2021 and September 2021.

Dates and Tasks:

Dates	Task	Reference/Notes
August	Save Exit Population for PY 20-21 Qtr. 3	See "Step 2" below
August	Send a Survey Invite to all PY 20-21 Qtr. 3 Exiters	See "Step 3A" below.
August	Send a Survey Invite to all PY 20-21 Qtr. 1 Exiters	See "Step 3B" below.
September	Send Follow-Up Survey Invites to all non-responders	See "Step 5" below.
September	After three attempts, contact non-responders via phone, postcard, etc.	See "Step 5" below.
October	Grace period for sending invites and receiving responses.	You can continue entering survey responses after the grace period, but you cannot send survey invitations

Step 1: Prepare your data

Finish entering and cleaning all attendance hours for the third quarter of program year 2020-21.

It should be noted that all students marked as "Retained in Program" throughout the year will "exit" at the end of this program year if they haven't already come back. **It is not recommended to use this program status.**

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

Since we're in the first quarter of this Program Year (21-22), we need to look back to the 3rd quarter (two quarters back) and obtain the list of students who exited.

- 4) Go to **Reports** → **Federal Reports** → **Core Performance Population**
- 5) Select “7/1/2020-6/30/2021” and under Special Options select Quarter “3.”
- 6) Generate. You can **Export** this to Excel, or a PDF file if you wish. The report will be broken down between “NRS Students” and “CAEP only Students.”
- 7) Review and make any necessary changes to this report before moving on to Step 2.

Step 2: SAVE your exit population

- 1) Go to **Tools** → **Core Performance Wizard**, select program year “7/1/2020-6/30/2021”. Click **Next** and select quarter “3”. Click **Next** again to generate the report.
- 2) The list of students is displayed (just like in the report we ran in Step 1.6). Click **Next** then click **Finish** to save the list of students. Note that, once generated, the wizard cannot run again for the same quarter.
- 3) To view the results, go to **Records** → **Core Performance Students**. The lister is filtered by default for **Exit Quarter** set to “Two Quarters Back”. Note: The earliest you can save an exit population is the first date of the required survey quarter.

Step 3A: SEND survey invitations to all PY 20-21 Qtr. 3 Exiters

- 1) Under **Records** → **Core Performance Students**, ensure the **Exit Quarter** column filter set to “Two Quarters Back” or “20-21 – Q3”.
- 2) Select any group of students from this filtered list and click the **Send Survey Invite** button in the toolbar. Once the Survey Wizard window pops-up, click **Next**.
Note: If you want to administer surveys to a subset of random students, hold “Ctrl” key on your keyboard and click the desired student records. Otherwise hold “Ctrl”+ “A” on your keyboard to select the whole population displayed in the lister.
- 3) Review the list of students selected. If needed, you can remove students from this list by highlighting the student and selecting **Delete Selected Records**. Click **Next** once the list has been reviewed.
- 4) Select Survey Language. Click **Next**.
- 5) Select Delivery Method. Click **Next**.
- 6) The next screen will prepopulate dates when the wizard will send invitations and when those invitations expire.

Select Invitation Delivery Date for Second Quarter after Exit: 8/6/2021 Select Invitation Expiration Date for Second Quarter after Exit: 11/1/2021

- a. The first date in the first row is the delivery date for the “Second Quarter after Exit” invitations. In other words, the survey invitations that need to be sent out in the current quarter. The Invitation Delivery Date will default to 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 in the first row 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: Select Invitation Expiration Date for Fourth Quarter after Exit:

- c. The first date in the second row is for the “Fourth Quarter after Exit” invitations. That means the survey invitations that need to be sent out in the third quarter of Program Year 2021-22. A default date value is set. You can choose another date but no later than the date when the survey invitation is set to expire.
 - d. The second date in the second row is when the survey invitation for the “Fourth Quarter after Exit” invitation will expire if it has not been opened / answered.
- 7) Select either “Administer without survey customization” or “Apply Survey Customization.” For details on how to use the Survey Customization click here: https://www.casas.org/docs/default-source/training-materials/guide-to-implement-follow-up-survey.pdf?sfvrsn=e0c93e5a_8?Status=Master
 - 8) Complete the wizard.
 - 9) Repeat Step 3A until you have sent surveys to all students listed under **Records** → **Core Performance Students** where **Exit Quarter** = or “20-21 – Q3”.
 - a. You can add the column “Has Survey Q2” to verify all students have been sent surveys.

Step 3B: CONFIRM or SEND survey invitations to all PY 20-21 Qtr. 1 Exiters

- 1) If you have completed Step 3A correctly in previous quarters, survey invitations to students who exited in PY 20-21 Q1 will have been sent automatically. To confirm:
 - a. Go to **Records** → **Survey Responses** lister. Then filter for **Quarter to Take Survey** column to “21-22 – Q1”.
 - b. Filter the Exit Quarter column for “20-21 – Q1.” If surveys show up, this task has been completed and continue to “Step 4: VIEW current quarter invitations”. If not, move on to “2)” below.
- 2) Return to **Records** → **Core Performance Students**. Filter the **Exit Quarter** column to “Four Quarters Back” or “20-21 – Q1” and click **OK**. Be sure to uncheck the box for “Two Quarters Back.”. The students displayed in this list are those that exited four quarters ago.
- 3) Select any group of students from this filtered list and click the **Send Survey Invite** button in the toolbar. Once the Survey Wizard window pops-up, click **Next**.
- 4) Review the list of students selected. If needed, you can remove students from this list by highlighting the student and selecting **Delete Selected Records**. Click **Next** once the list has been reviewed.

- 5) Select Survey Language. Click **Next**.
- 6) Select Delivery Method. Click **Next**.
- 7) The next screen will prepopulate dates when the wizard will send invitations and when those invitations expire similar to Step 3A above.
Note: Only one row of dates are displayed, the delivery date for “Fourth Quarter After Exit.” This is because we are 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.
- 8) Select either “Administer without survey customization” or “Apply Survey Customization.” For details on how to use the Survey Customization click here: https://www.casas.org/docs/default-source/training-materials/guide-to-implement-follow-up-survey.pdf?sfvrsn=e0c93e5a_8?Status=Master
- 9) Complete the Wizard.
- 10) Repeat Step 3B until you have sent surveys to all students listed under **Records** → **Core Performance Students** where **Exit Quarter** = or “20-21 – Q1”.

Step 4: VIEW current quarter invitations

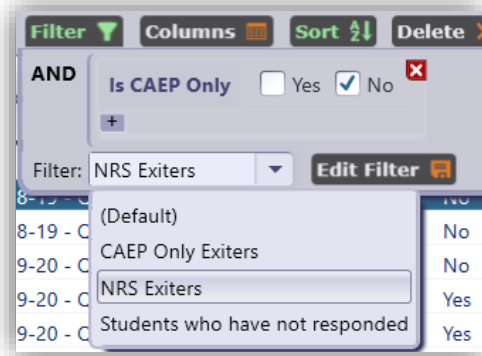
At this point, all survey invitations should have been sent to students.

- 1) To view details of the survey invitation status go to **Records** → **Invitations**.
- 2) Important Note: This lister only filters by quarter in which the survey needs to be taken. It does not break down a student’s exit quarters.
- 3) We can see the date the invitation was sent in the **Date to Send Invitation** column and also when the invitation will expire in **Date When Invitation Expire** column
- 4) We can see if the survey was accessed (student has clicked on the survey link) in the **Was Accessed** column and if the invitation has been successfully sent to the student in the **Delivery Status** column.
- 5) We can also view future survey invitations changing the filter **Quarter to Take Survey** column to “21-22 – Q3”. Notice that these invitations will still have the status “Pending” because the date to send the invitation is still in the future.
- 6) If you would like to resend a survey, select the student(s) and click the **Resend Invite** 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. See end of document for survey limits.

Step 5: Personally contact students who don’t respond

To manage survey responses, go to **Records** → **Survey Responses**. Lister has the capability to **Resend Invite** in the toolbar and **Answer Survey** by double clicking on a student. It also has similar columns as the Invitations lister detailed in Step 4.

- 1) To manage survey responses, go to **Records** → **Survey Responses**. The default filter for **Quarter to Take Survey** is set to “Current Quarter.” Confirm that the list of students shown have a **Quarter to Take Survey** of “21-22– Q1.”
- 2) Next click the **Filter** button next to your agency. Click on the drop down menu and select “NRS Exiters.” It may already be selected by default.



- 3) From this filtered list, select the student(s) who have not responded to the survey by filtering the **Survey Responded** column and select “No.”
- 4) Double click on any student. This will take you to their survey record.
- 5) Click **Answer survey** to enter any student responses that you have personally contacted.

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**

1. Click **Get Item Responses** to populate the Survey Items table after entering responses in the survey.
2. You can also edit **Contact Status** or **Contact Notes** to keep tabs on missing surveys.

Common Questions:

★ Question: How do I know if I have completed the quarterly deliverable requirement?

You will know if you have completed the deliverable requirement if both exit populations have been surveyed for that quarter. For this deliverable requirement, under **Records > Survey Responses** filter **Quarter to take Survey** column for “21-22 – Q1”. If the **Exit Quarter** column has both “20-21 – Q3” and “20-21 – Q1” surveys, then you have completed the requirement.

Question: Our agency is also CAEP funded. What about the CAEP requirements?

The steps in the document also fulfill the requirements for CAEP. Following up with CAEP-only exiters is optional. If you would like to review the results of your CAEP exiters, go to **Records → Survey Responses**. Click the Filter button next to your agency. Click on the drop down menu and select “CAEP Only Exiters.”

Question: I sent my all the surveys but they all aren’t showing on the Surveys lister? Why is this?

The Survey’s lister by default only shows “NRS Exiters.” In **Records → Survey Responses**, click the **Filter** button next to your agency. Click on the drop down menu and select “CAEP Only Exiters.” The hidden CAEP survey records should now appear. See Step 5.2 for a screenshot of the Filter drop down menu. This

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.

Question: It’s past the grace period. What happens now?

You will need to contact the CASAS Technical Support Staff to assist. TE no longer allows you to use the student portal to send surveys. CASAS staff will manually create student survey records for the missed surveys and you will have to personally contact all students on the list before the requirement is marked as complete.

Question: We are directly contacting students. Do we still need to do the steps above?

Yes. You will still need to do the steps above to create individual survey records under **Records → Survey Responses**. Once the surveys are on this lister, you can enter any responses by clicking **Answer Survey** in the tool bar.

Question: Can I use the 'Resend Invite' button after the grace period?

No. TE no longer allows you to use the student portal to send surveys. Agency staff will need to contact students directly.

Question: What about the Perkins Requirement?

Additional documents and guidelines will be released on this requirement. In the meantime, be sure you followed all the steps above.

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](#)