First Quarter PY 21-22 Task Schedule
CAEP Employment and Earnings Survey

This document provides suggested dates and necessary tasks to complete the Employment and Earnings Survey Requirement for CAEP-only 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 - September	Send a Survey Invite to all PY 20-21 Qtr. 3 Exiters	See “Step 3” 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.

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.

1) Go to **Reports → State Reports → California → Core Performance Population**
2) Select “7/1/2020-6/30/2021” and under Special Options select Quarter “3.”
3) 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.” Students who fall into the “NRS Students” table meet the Federal Reporting guidelines while “CAEP only Students” in the second table include students from additional instructional programs, such as CTE or Workforce Preparation. Students are not duplicated in both tables.
4) Review and make any necessary changes to this report before moving on to Step 2.

Step 2: SAVE your exit population

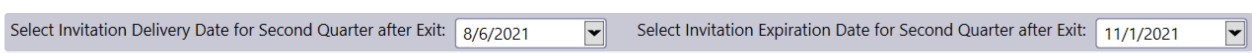
1) Go to **Tools → Core Performance Wizard**, select program year “7/1/2020-6/30/2021”. Click **Next** and select quarter “3”. Click **Next** again to generate the report.

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.

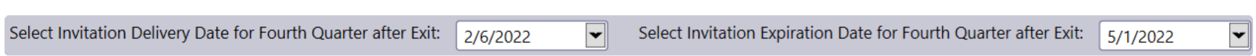
Step 3: SEND survey invitations to all PY 20-21 Qtr. 3 Exiters

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.



   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.



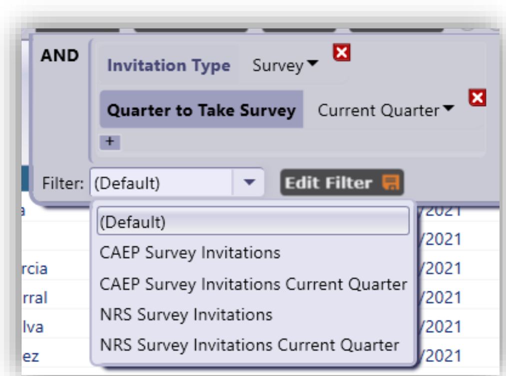
   c. The first date in the second row is for the "Fourth Quarter after Exit" invitations. That means the survey invitations that need to be sent out in the third quarter of Program Year 2021-22. A default date value is set. You can choose another date but no later than the date when the survey invitation 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.
   e. Note that while following up with students four quarters after exit isn't required, the Wizard has this option by default.
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 until all students have been surveyed.

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.**
   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.
2) In the toolbar, click **Filter**. Once the drop down come up, change Filter from "(Default)" to "CAEP Survey Invitations." Click **Ok**. If you only want to view the current quarter requirements, click "CAEP Survey Invitations Current Quarter."



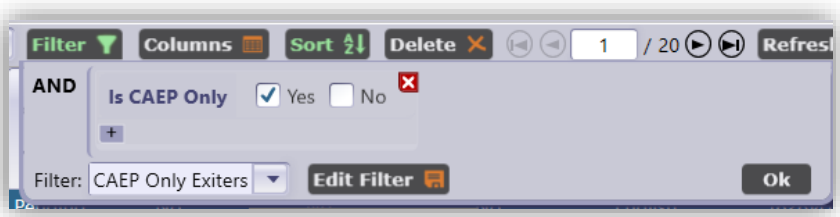
3) We can see the date the invitation was sent in the **Date to Send Invitation** column and also when the invitation will expire in **Date When Invitation Expire** column
4) We can see if the survey was accessed (student has clicked on the survey link) in the **Was Accessed** column and if the invitation 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.

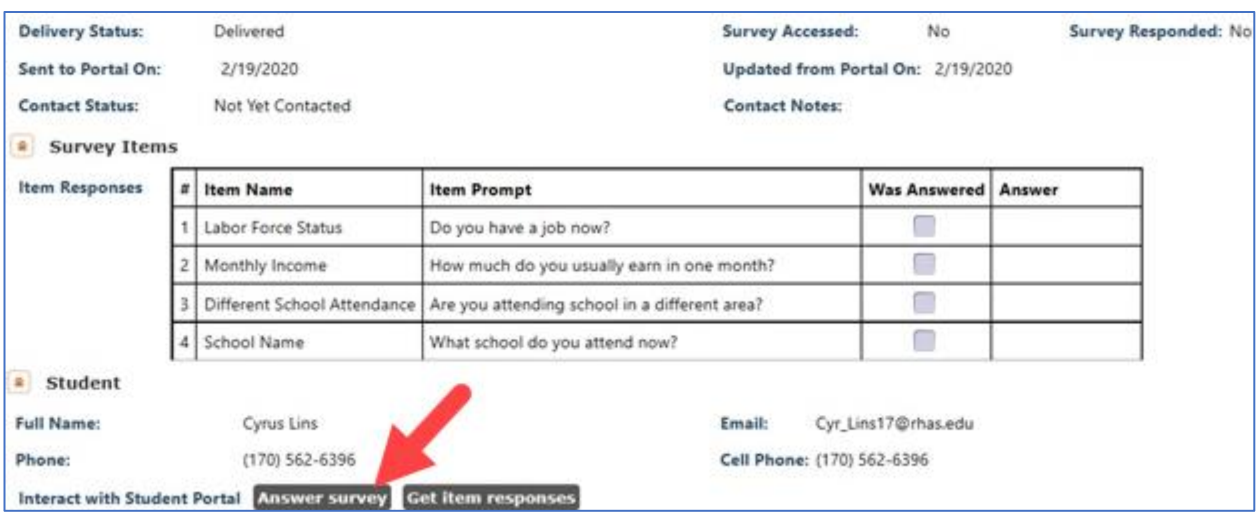
OPTIONAL Step 5: Personally contact students who don't respond

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) In the toolbar, click **Filter**. Once the drop down come up, change Filter from "(Default)" to "CAEP Only Exiters." Click **Ok**.



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.



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

This document is for CAEP-only agencies. If you are WIOA, Title II funded, refer to the "Employment and Earnings Schedule for 1st Qtr PY 21-22" which also covers the CAEP submission requirements.

Question: How do I know I completed the requirement?

You will know if you have completed the deliverable requirement if students who have exited in "20-21 – Q3" have been sent surveys. To confirm, under **Records** > **Survey Responses** filter **Quarter to take Survey** column for "21-22 – Q1". In the toolbar, click **Filter**. Once the drop down come up, change Filter from "(Default)" to "CAEP Only Exiters." Click **Ok**. If the **Exit Quarter** column has "20-21 – Q3" surveys, then you have completed the requirement.

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: 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.

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