

# **TOPSpro Enterprise**

## **Guide to Implement Follow Up Survey**

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## Generating and Saving the NRS Core Performance Student Population

1. Open TE Client and login to your agency Data Manager credentials. If someone other than the Data Manager will be saving the exit population and/or sending survey invitations please refer to: How to Assign Rights to Another User.
2. From the main menu go to Tools and select NRS Core Performance Wizard.
3. From the Program Year dropdown, select the 18-19 program year (current PY) and click Next.
4. Select the first quarter and click Next.
5. Wait until the report is generated and a list of students is displayed. Click the Next button to continue with the wizard.
6. Click the Finish button in the last screen to save the list of students that need to be followed up. Two confirmation popup windows will be presented to inform you that once you generate the list by clicking Finish you cannot run the wizard for this quarter again.
7. The list is generated and saved. Click Exit to close the wizard. Note: No need to export the file as this is only needed in special situations related to data match.

## Administering Survey to Student Population

1. From TE main menu, click on Records and select NRS Core Performance Students.
2. When the lister opens it automatically selects the filter “Two Quarters Back” for the Exit Quarter value, and this will show the list of all students selected in the previous section. Since not all students need to be surveyed, the lister is by default filtered to show only students without SSN. Alternatively, from the filter dropdown select the predefined “Does not have SSN and has Email or Phone (can be surveyed)”, which will display all students without SSN that have email or phone values entered and can receive the survey invitation link. Once selected, if the list of students is not automatically updated click on the Refresh button.  
Note: To see the list of students for a specific site, click on the Filter button, then click on the “+” button and from the Student section select the option “Site”. Then, from the dropdown, choose a site value and click “OK” to close the filter. Click the Refresh button if the list is not automatically updated.
3. The list of students generated in the first section is displayed.
4. The survey is available in multiple languages; if you want to administer the survey in a specific language for a subset of your student population, you can use Native Language as an additional filter if you want to target, for example, your Spanish speakers.
5. If you want to administer surveys to a subset of random students, hold Ctrl key pressed on the keyboard and click the desired student records, otherwise use Ctrl+A to select the whole population displayed in the lister. Important: the invitation is sent only to selected students. Click on the “Administer Survey” button from the toolbar. A confirmation popup window will be displayed – click “Yes” to continue. This will open the Survey Invitation Wizard, described in the next section.

## Survey Invitation Wizard

1. This wizard allows you to invite the selected student population to take the NRS Employment and Earnings Survey. Click the Next button.
2. From the Default Language dropdown box, select the survey language or leave default (English) value. Depending on population selected (see steps #4 and #5 in the previous section) you may want to choose a different language than English. Click Next button to continue.
3. From the Invitation Delivery Method dropdown box, select how the student(s) will receive the survey link: by email only, by SMS only, first by email (an SMS will not be sent unless email is missing), first by SMS (an email will not be sent unless phone is missing) or both.
4. Follow on-screen indications and select the dates (for the second and fourth quarters since program exit) when the application should start sending survey invitations to the selected students. You can also leave the default values. By default, the date to send the invitation for the second quarter is the current day (the day the wizard is run). Similarly, the same day-in-the-quarter is set by default for the fourth quarter. For example, if you run the Survey Administration wizard on February 20, and don't make any change to the default dates, it will be Feb. 20 for the second quarter, and Aug. 20 for the fourth quarter. At the end of the wizard **two survey invitations are generated, one for 18-19 Q3 (the current quarter), and one for 19-20 Q1 (two quarters later)**. Click Next to continue.
5. Choose if you want to run the survey with or without customization. Customization is recommended in order to personalize the invitation with your agency name, logo, etc. If you wish to customize the survey select "Apply survey customization" and follow the next section of the document that describes the process. If you wish to continue with the default configuration select "Administer without customization" and click Next.
6. The last page of the wizard shows a summary of the parameters selected while going through the wizard. Click Finish to complete the wizard.
7. Notice in the NRS Core Performance Students lister that the students for which a survey record was generated will show the value "Yes" under the "Invitations Ready to Go" column. Click the Refresh button if the lister is not automatically updated.

## Survey Customization

Note: Customizing the survey layout and/or specific texts used in the process, or using features like an agency email server involves a certain expertise. Contact CASAS Tech Support if you need help with this operation.

1. The customization screen is displayed with four category tabs and you can perform the following actions:
  - a. The first tab is where you can customize the agency name (by default TE will use the agency ID and name from the application database; in the Alternative Agency Name field you can use a friendlier agency name which is familiar to your students), the survey

title, the survey description, text font, size and color, and add an agency logo. To add the logo, simply click on the “Select Image” button, browse to the location where the logo picture file is stored and select it. You can also choose where the logo is displayed (left of title, below, above or right) and how large the logo image will be displayed. Important: The survey is available in multiple languages, and is administered using a multi-language website. When making text customizations you need to repeat/translate any customization you make into all languages that are likely to be used by your students.

- b. The second tab is where you can customize the invitation text sent by email (subject and body text), the SMS invitation text, the welcome message displayed when the student opens the survey and the ending message displayed when the student completes the survey. Customizations are not mandatory and there are default values already set for each of these fields that can be used.
  - c. The third tab is where you can select specific layouts (text size, font, color, background) for different sections of the survey item. There’s also the option to use a set of default layouts, automatically selected.
  - d. The fourth tab is reserved for agencies that have an email server and would like to use that for sending survey invitations, instead of using the default email server CASAS provides; this will require acquiring specific information from your IT department.
  - e. At any point in the survey customization, you can click the “Preview Survey in Student Portal” button and a link will be generated. When clicked, the link will open a browser window where you can view the actual survey and its customizations as a fake John Doe male student.
2. Click the Next button to complete customizations and continue with the Wizard.
  3. Please **remember** that, by default, the wizard loads the last customization used. If the survey was customized once, it will keep that customization configuration when the option “Apply survey customization” is selected in the wizard.

### Monitor Survey Invitations and Items

1. From the TE main menu, click on Records and select Surveys lister.
2. In this lister you can monitor the status of invitations being sent and surveys being accessed and answered.

Note: To see the list of students for a specific site, click on the Filter button, then click on the “+” button and from the Student section select the option “Site”. Then, from the dropdown, choose a site value and click “OK” to close the filter. Click the Refresh button if the list is not automatically updated.
3. The “Quarter to Take Survey” column shows the quarter in which the students will be sent an invitation to take the survey and is, by default, filtered to show only the current quarter.
4. The “Date to Send Invitation” column shows the date when the survey invitation will be sent to the student. The date is the one selected by you when the Survey Invitation Wizard was run.

5. The “Delivery Status” column will show the value “Delivered” if the survey invitation link was sent to the student, either by email or SMS or both. The value “Undeliverable” will be displayed if the invitation link could not be sent to the student either by email or SMS. The column will also show the value “Pending” when the survey invitation link was generated but was not transferred to the Student Portal. **Please note** that depending on the system load the information about the requested survey invitation may be transferred to the MyCASAS Student Portal at a later time. Once this transfer is completed the Student Portal automatically handles communicating the invitation to take the survey on the selected date, its administration, answer collection and return of survey results to TE upon survey completion.
6. The “Survey Accessed” column shows the value “Yes” if the student has accessed the survey link.
7. The “Survey Responded” column shows the value “Yes” if the survey has been completed.
8. The column “Filled-in By Clerk” shows the value “Yes” for the cases when the student had to be contacted by a clerk over the phone and the clerk has answered the survey.
9. The column “Contact Status” indicates the direct contact status – if the clerk has managed to contact the student and what was the result of that contact. The clerk selects a value based on the result of the contact. Selection values are: Contacted, Contacted but Doesn’t Want to Answer, Call Later, Call Tomorrow, Call in the Evening, Not Yet Contacted. To select a value, double-click on the survey record, click on the Edit icon for the Survey section and select a value in the Contact Status field.
10. The clerk also has the option to write notes while contacting the student. To enter notes, double-click on the survey record, click on the Edit icon for the Survey section and enter the notes in the Contact Notes field. In the lister, these will be displayed under the “Contact Notes” column.
11. Students may receive more than one survey invitation link (see next chapter). When the student answers the survey by clicking on one of the invitation links, the other invitation links will be marked as redundant and when the student clicks them the Student Portal page will show a message informing the student that the survey has already been answered. The column “Invitation Redundant” shows the value “Yes” for those invitation links marked as redundant.
12. To view how a student answered a survey, double-click on a survey record for which the column “Survey Responded” shows the value “Yes”.
13. To export all surveys that were responded to, including the answers to the survey questions, filter by the Survey Responded column and choose Yes. Then click the Export button in the toolbar and choose the second option "Export Student Survey Items".

### Sending Second and Third Survey Invites

1. From the TE main menu, click on Records and select Surveys lister.
2. In this lister you can monitor the status of invitations being sent and surveys being accessed and answered.

3. The “Survey Responded” column lets you know if the survey has been completed either by the student or the clerk. If the value displayed is “No”, the survey was not answered. Approximately one week after you sent your agency’s first survey invitation you may send the **second** survey invitation.
4. Filter the Survey lister to show only the students who did not respond: click on the filter icon in the Survey Responded column and select the value “No”. Click Refresh button if the lister is not automatically refreshed.
5. To administer the survey in a specific language for a subset of your student population, you can use the Native Language filter to select one language: add the Native Language column if it’s not already visible and click on the small filter icon, then select your option.
6. After the lister is filtered, press CTRL + A on your keyboard to select all records and click the “Administer Survey” button in the toolbar.
7. Follow the steps in sections “Survey Invitation Wizard” and “Survey Customization” above. Students will receive a second survey invitation.
8. Continue monitoring the survey responses. Approximately one week after you sent your agency’s second survey invitation, for the students that still haven’t answered yet, you may send the **third** survey invitation.
9. Follow steps #4 - #7 to send the third survey invitation.
10. If there are students that still haven’t accessed and responded to the survey, follow the steps in the next section.

### Non-respondent Students follow-up

1. From the TE main menu, click on Records and select Surveys lister.
2. In this lister you can monitor the status of invitations being sent and surveys being accessed and answered.
3. The “Survey Responded” column lets you know if the student has completed the survey. If the value displayed is “No”, the student did not respond to the survey. Approximately one week after you send your agency’s last survey invitation you should begin contacting students.
4. Filter the Survey lister to show only the students who did not respond: click on the filter icon in the Survey Responded column and select the value “No”. Click Refresh button if the lister is not automatically refreshed.
5. The most common scenario is probably contacting students by phone. You can follow this procedure.
  - a. Click on a record in the lister.
  - b. By default, the lister displays columns for mobile phones and land lines. Use whatever phone number you have on record for that student and attempt contact.
  - c. When contact is established, click the Answer Survey button located in the lister’s toolbar.

- d. The Student Portal will open and you can enter the student answers to the survey questions.
- e. When the answers have been saved and you return to the lister, click on another record and follow the steps above.

Alternatively: Double-click on one record to view the details.

- a. The Survey Items section shows a table with the survey items and the student answers.
- b. The Student section shows the student name and contact details.
- c. There are two buttons in the “Interaction with Student Portal” section:
  - i. The “Answer Survey” button will open the Student Portal and allows you to manually enter the answers during your phone call or after you contacted the student.
  - ii. Within TE by default all survey answers are retrieved from the Student Portal at certain intervals. The “Get Item Responses” button will trigger the immediate retrieval of the survey answers for this particular survey.
- d. When the answers have been saved for the current student, click on the small “Next” arrow in the toolbar to move to the next student or exit the detailed view and double-click on the next record.