Job Aid: Follow-up Evaluation Survey

Purpose

The purpose of the Follow-up Evaluation Survey job aid is to guide you through the step-by-step process of creating a follow-up evaluation survey.

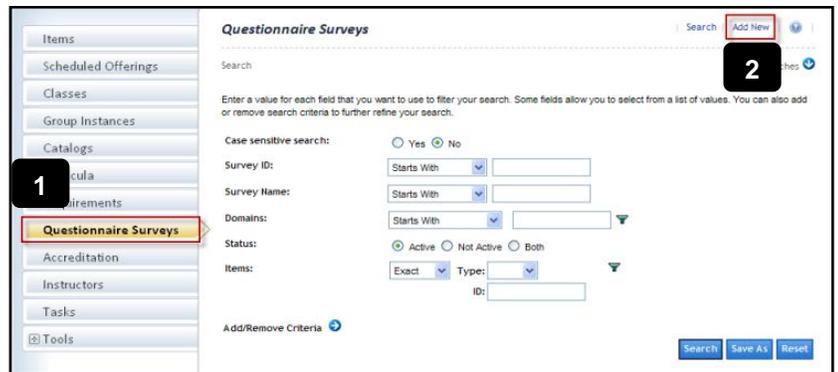In this Job Aid, you will learn how to:

- Create Draft Survey
- Add Questions
- Preview and Publish Survey
- Configure Options and Notifications
- Associate Survey with Item
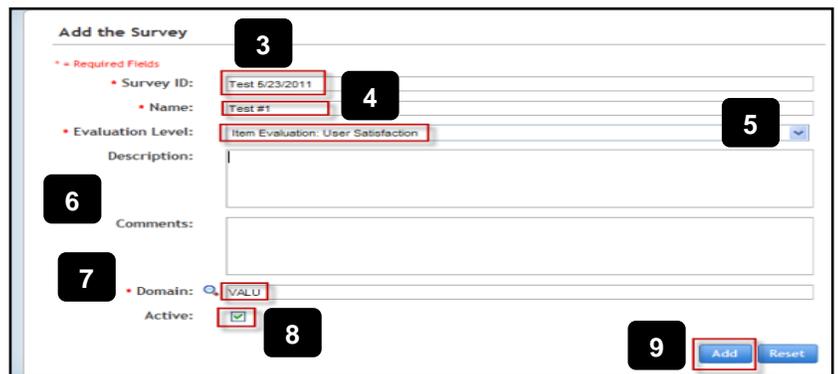- Associate Item with Survey

Task A. Create Draft Survey

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Questionnaire Surveys**.
2. Click **Add New.**

3. Enter a **Survey ID**.
4. Enter a survey **Name**.
5. Select an **Evaluation Level** from the drop-down menu.
6. Enter a survey **Description** and **Comments**.
7. Select a **Domain**.
8. Click the **Active** checkbox.
9. Click **Add**.

Task B. Add Questions

1. Select the **Questions** tab for the questionnaire survey previously created.

Note: * Indicates a required field.

2. Enter the **Survey Instructions**.
3. Enter the first page **Title**.
4. Enter the first page **Instructions**.
5. Click the **Add Question** icon.

6. Enter the question stem in the text box.
7. Select the **Question Type** from the drop-down menu.
8. Select a **Rating Scale** from the drop-down menu.
   Repeat steps 5-8 to add additional questions to this page.

9. Click the **Add Page** icon to add an additional page.
10. Enter the second page **Title** and second page **Instructions**.
11. Repeat steps 5-8 above to add questions to this page.
12. Click **Save Draft** when finished entering pages and questions.

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Task C. Preview and Publish Survey

1. Select the **Questions** tab.
2. Click **Preview** and select **Draft** from the drop-down menu.

3. Review the preview of the survey.
4. Click **Close** to return to the previous screen.

5. Click **Publish.** The survey is now ready for use.

   Note: To edit a published survey, you must use the **Create Draft** button and re-publish when editing is completed.

Task D. Configure Options and Notifications

1. Select the **Options** tab.
2. Verify Yes is selected for **Anonymous Surveys**.
3. Check **Required for Item** Completion, if desired.
4. Complete the **Days to Complete** field for how long participants have to complete the survey.
5. Select the appropriate radio button for **Include Comments Field for each Question**.
6. Click **Apply Changes**.

7. Select the **Notifications** tab.
8. If necessary, edit the **Body** of the notification message.
9. Click **Apply Changes**.
10. If necessary, click **Browse** to add an attachment to the notification.
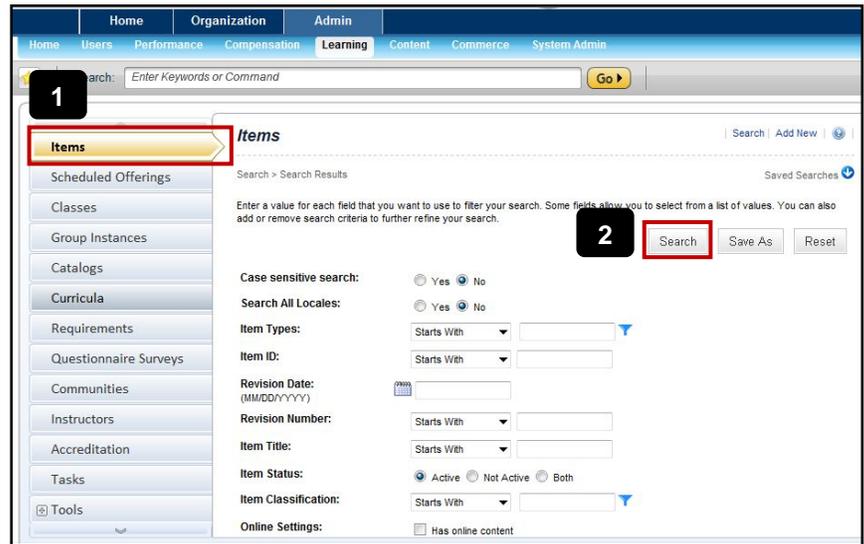11. Click **Apply Changes**.

Task E. Associate Survey with Item

1. Select the **Item Usage** tab.
2. Click the **add one or more from list** link to search for and select one or more items, or select the item **Type** and enter the **Item ID** exactly.
3. Click **Add**.
4. Review the list of added items.

Note: Once this survey is assigned, completions and mean score can be viewed on this tab.

Task F. Associate Item with Survey

1. Navigate to **Learning > Items**.
2. Search for an item.

3. Click the **Item** link to edit the Item.

4. Click the **More** link.

5. Select the **Evaluations** tab from the pop-up window.

6. In the **Follow-up Evaluation: Applicaton of Learning** section, click the **Search** icon to search for and select a questionnaire survey or enter the questionnaire title.

7. Select the Both for Participants.

8. Enter number of days from item completion to assign the evaluation.

9. Enter the number of days allowed to complete,

10. Click **Apply Changes**.
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