

Agency Questionnaires

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Purpose of this document

This document explains how the Agency Data Review functionality provides users with the ability to create Agency Questionnaires, such as monthly surveys, and record data obtained from these Questionnaires.

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Purpose

The Agency Data Review functionality provides users with the ability to create Agency Questionnaires and record data obtained from these Questionnaires. Some examples would be Qualification assessments or Monthly Statistics Surveys. In addition the information can be used to export to external monitoring agencies such as the State of NY HPNAP if necessary.

None of the data entered here automatically updates any other Agency fields in Ceres.

Ceres Object release 4.05.69 is required for the functionality described in this document.

General Structure

To record the Agency Review data, the Questionnaire(s) must first be setup. Once a Questionnaire has been setup it is then used as the template to guide the food bank through the review process to insure that all required information is gathered and recorded. The setup of Questionnaires involves three steps:

1. Setup of questions.
2. Setup of Questionnaire Header.
3. Linking questions to the Questionnaire Header and defining the Answer Guide.

Setup of Questions

1. Questions setup may be accessed by selecting Departments → Agency & Receivables → Agency Relations → Setup → Questionnaire → Ceres Questions.

Questions can be used on one or more Questionnaires. If the same question is needed for multiple Questionnaires, it only needs to be setup once in Ceres Questions regardless if the answers may be different for different Questionnaires. An example of this may be a question relating to the type of Agency, where different reporting agencies may require a pre-defined answer set particular to them.

←

→

▼

Finance Company ▶ Departments ▶ Agencies & Receivables ▶ Agency Relations ▶

▼

Departments

▶ Financial Management

▲ Agencies & Receivables

Agency Relations

Order Processing

Marketing

Inventory & Fees

Agency Express

CMobile Documents

▶ Purchase

▶ Donation

▶ Warehouse

Human Resources

▶ Roadnet

▶ Appian

▶ Administration

Matriks Doc

Home

Departments

Agency Relations

Questionnaire - Test

Agencies

Agency List

Parent Agency Listing

Agency Register

Agency - Order Summary

Agency - Order Detail

Agency Labels

Top_Agency List

Agency/Item Statistics

Agency/Item Statistics Det/Sum

Agency - Distributions List

Agency Balance to Date

Agency Trial Balance

Agency Reporting Compliance

Agency Days and Hours

Salespeople/Teams

Agency/Item Stat. by Salespers.

Salesperson Statistics by Inv.

Salesperson Commission

Salesperson To-dos

Salesperson Opportunities

Team To-dos

Documents

Documents

Contact - Cover Sheet

Administration

Setup

Salespeople

Create Appointments

Agency Templates

Default Appointment Setup

Qualifier Setup

Agency Groups

Standing Appointment List

Reporting Requirements

Questionnaire

Questionnaire Setup

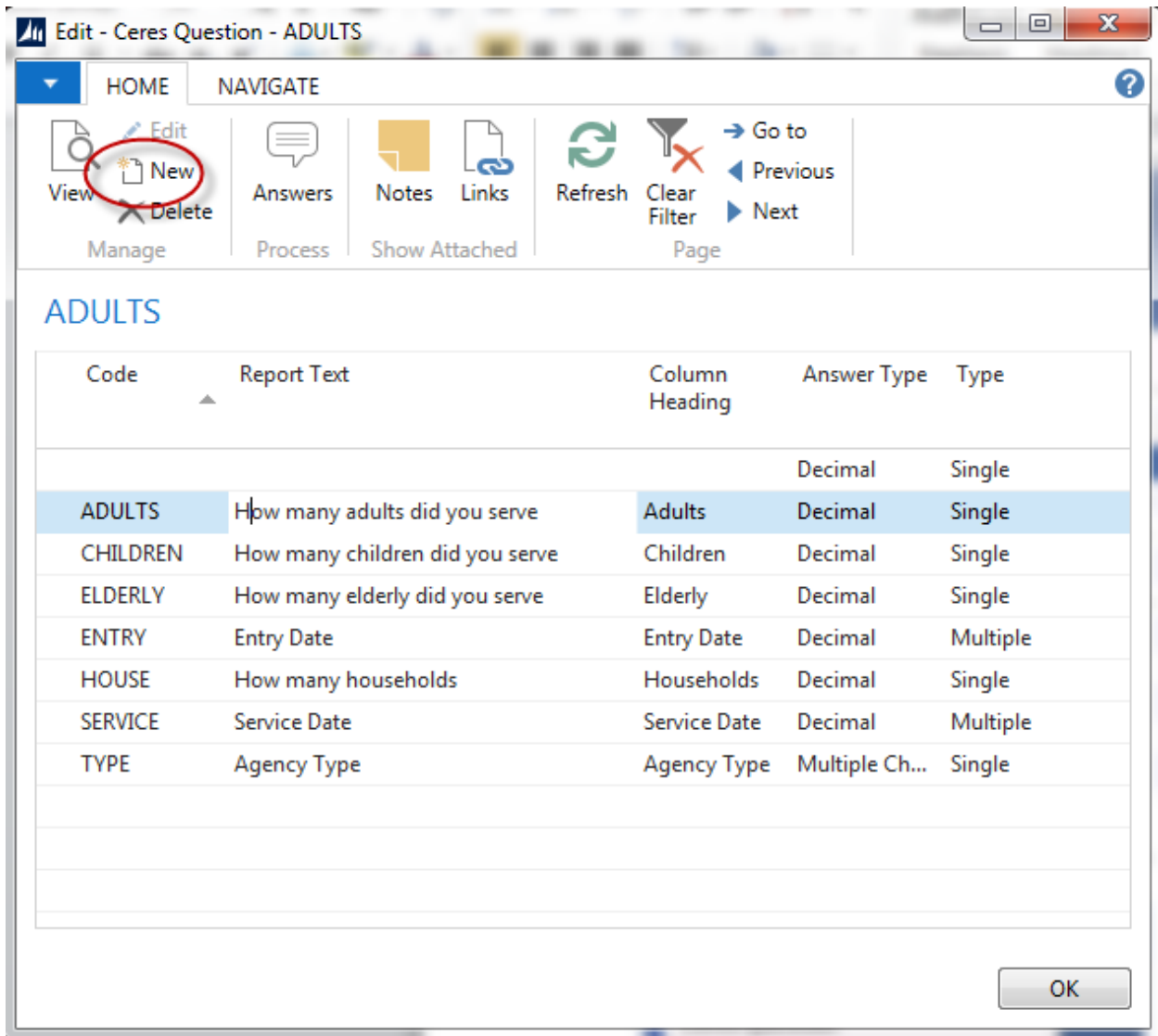
Ceres Questions

Agency Data Review

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Last Reviewed 3/28/2018

2. A list of all questions currently defined will be displayed.



The screenshot shows a web application window titled "Edit - Ceres Question - ADULTS". The interface includes a top navigation bar with "HOME" and "NAVIGATE" tabs. Below this is a toolbar with icons for "View", "Edit", "New" (circled in red), and "Delete". The "New" button is highlighted. The main content area is titled "ADULTS" and contains a table with the following columns: Code, Report Text, Column Heading, Answer Type, and Type. The table lists several questions, with the first row highlighted in blue.

Code	Report Text	Column Heading	Answer Type	Type
ADULTS	How many adults did you serve	Adults	Decimal	Single
CHILDREN	How many children did you serve	Children	Decimal	Single
ELDERLY	How many elderly did you serve	Elderly	Decimal	Single
ENTRY	Entry Date	Entry Date	Decimal	Multiple
HOUSE	How many households	Households	Decimal	Single
SERVICE	Service Date	Service Date	Decimal	Multiple
TYPE	Agency Type	Agency Type	Multiple Ch...	Single

An "OK" button is located at the bottom right of the window.

3. Click Actions → New to create a new question.

4. Fill in the information as necessary:

Code: Enter a unique code to identify the question. Use something short by descriptive such as Adults, Children, etc.

Report Text: Enter the question that is to be asked of the agency in the form of a question to aid the user when performing the review.

Column Heading: This is a short description that will identify the information being requested when recording answers during the review.

Answer Type: Choose from Decimal or Multiple Choice. Decimal will allow for the entry of a number such as a quantity or dollar amount. Multiple choices will allow you to setup multiple answers for the user to select from when answering the question.

Type: Choose from single or multiple. If only one answer is allowed for the question choose single, otherwise choose multiple to allow for more than one answer to be selected for the question. This can also be used to record a date into multiple segments for reporting purposes such as the Submission Date for HPNAP reporting.

5. Repeat steps 3 and 4 as necessary to define as many questions as needed.

Note – A Ceres Questions cannot be changed or deleted if it is on an Active survey.

Setup of Questionnaire

1. Questionnaire setup may be accessed by selecting Departments → Agency & Receivables → Agency Relations → Setup → Questionnaire → Questionnaire Setup.

The screenshot displays a software interface with a breadcrumb trail at the top: Finance Company > Departments > Agencies & Receivables > Agency Relations > Agency Relations. On the left is a sidebar menu with categories: Departments, Agencies & Receivables (expanded), Purchase, Donation, Warehouse, Human Resources, Roadnet, Appian, and Administration. Under 'Agencies & Receivables', 'Agency Relations' is selected. The main content area is titled 'Agency Relations' and contains several sections: 'Questionnaire - Test' (with a sub-section 'Agencies' listing various reports like Agency List, Parent Agency Listing, Agency Register, etc.), 'Salespeople/Teams' (listing reports like Agency/Item Stat. by Salespers.), 'Documents' (listing 'Contact - Cover Sheet'), 'Administration' (listing 'Setup' with sub-items like Salespeople, Create Appointments, Agency Templates, etc.), and 'Questionnaire' (with 'Questionnaire Setup' circled in red). At the bottom left, there are 'Home' and 'Departments' buttons.

To create a new Questionnaire, choose Actions → New

Code	Description	Bloc...	Deny AE ...	AE Survey Frequency	AE Survey Title	AE Survey Start Date	AE Survey Expiration...	AE Survey Grace Period	AE Survey Status
HPNAP	HPNAP Grant Review	<input type="checkbox"/>	<input type="checkbox"/>	1M	HPNAP Grant Review	9/1/2017	12/31/2017	2W	In Planning

2. Fill in the information as necessary:

Code: Enter a unique code to identify the questionnaire. Use something descriptive like HPNAP, TEFAP, etc. to easily identify the questionnaire.

Description: Enter a longer description that fully identifies the questionnaire.

Blocked: Check this box to prevent entry of reviews against this questionnaire. This is useful, if the questionnaire was to be used to collect information for a period of time and you no longer wish to have users enter additional data into this particular questionnaire.

Deny AE Ordering: Check this box if failure to complete the Survey should deny the Agency's ability to place online orders.

AE Survey Frequency: Specify here the frequency with which the Survey must be completed. For example 1M = Monthly, 1Q = Quarterly.

AE Survey Status: Provide the status of the Survey. The valid options are: In Planning, Active, and Closed.

AE Survey Title: Provide a descriptive title for the Survey

AE Survey Start Date: Specify the date the Survey becomes effective.

AE Survey Expiration Date: Specify the date the Survey is no longer effective.

Created By: A system controlled field that records User ID for the user that created the questionnaire.

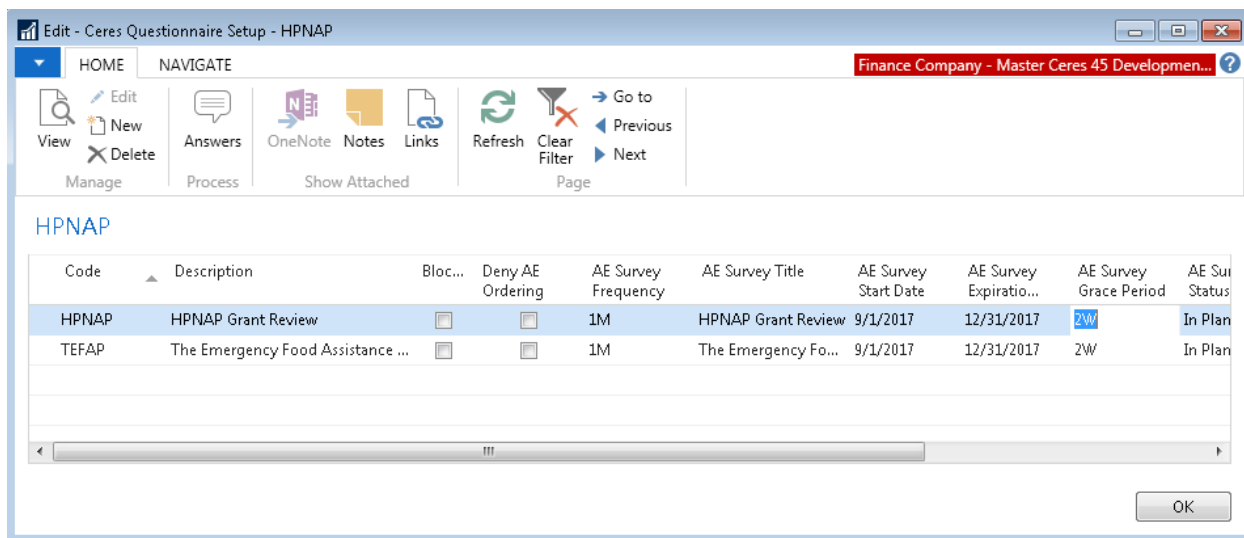
Last Modified By: A system controlled field that records User ID for the user that last modified the questionnaire.

Last Modified Date: A system controlled field that records date the questionnaire was last modified.

AE Survey Grace Period: Specify the allowable Survey submission deviation from the expected submission date. For example, if the Survey's frequency dictates submission on 09/01/17, specifying 1W here will provide for a grace period ending on 09/08/17.

AE Survey Next Send Date: Used in conjunction with the AE Survey Frequency to determine the next submission date.

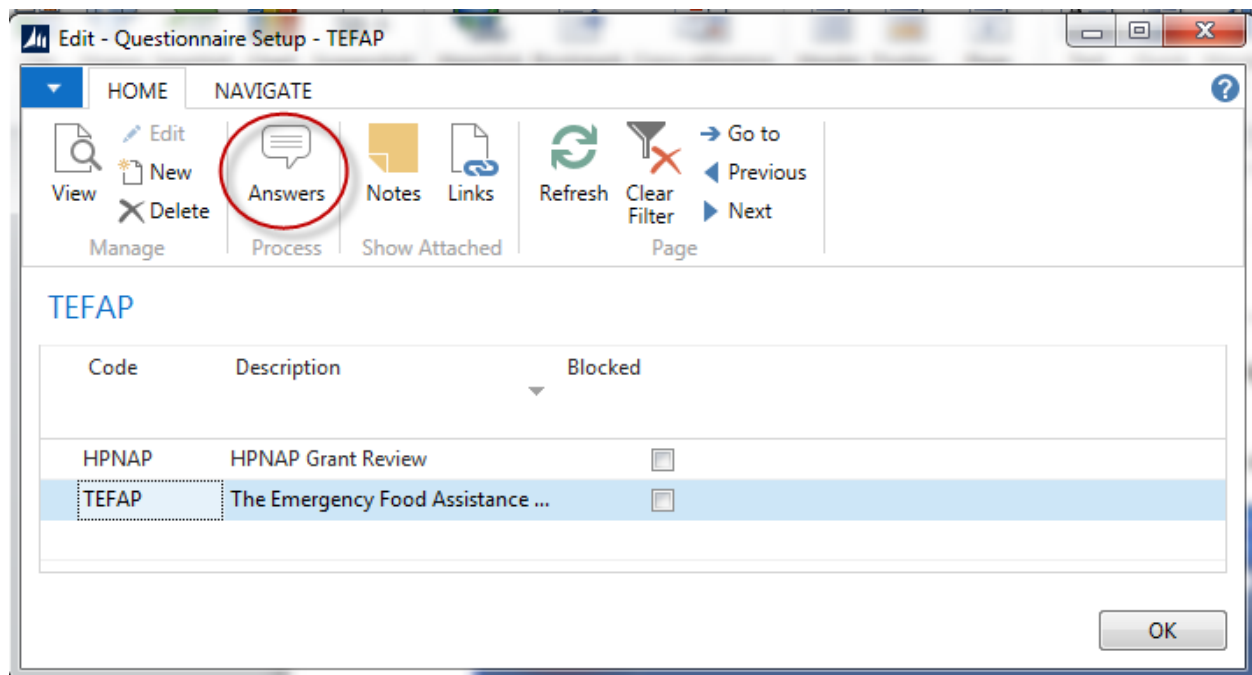
3. Here we have created a new Questionnaire called TEFAP.



Code	Description	Bloc...	Deny AE Ordering	AE Survey Frequency	AE Survey Title	AE Survey Start Date	AE Survey Expiration	AE Survey Grace Period	AE Survey Status
HPNAP	HPNAP Grant Review	<input type="checkbox"/>	<input type="checkbox"/>	1M	HPNAP Grant Review	9/1/2017	12/31/2017	2W	In Plan
TEFAP	The Emergency Food Assistance ...	<input type="checkbox"/>	<input type="checkbox"/>	1M	The Emergency Fo...	9/1/2017	12/31/2017	2W	In Plan

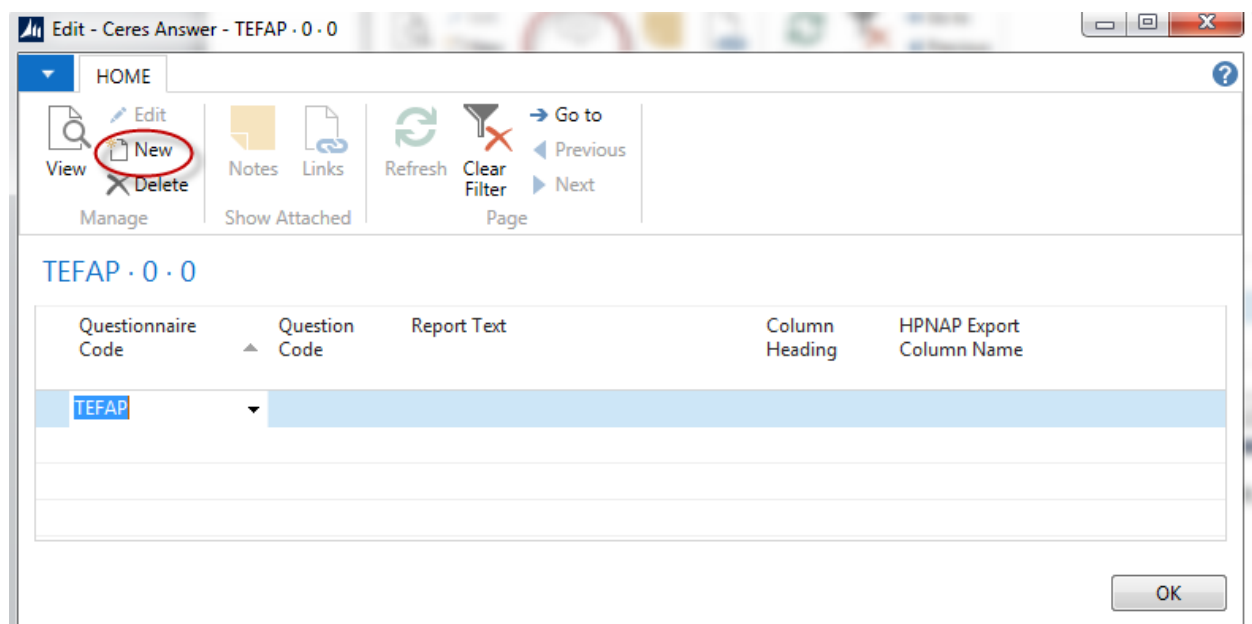
4. This completes the setup of the Questionnaire Header. Next we will assign the questions required for this Questionnaire and define the allowed answers.

5. First click on the Questionnaire you wish to work with and then click on Answers...

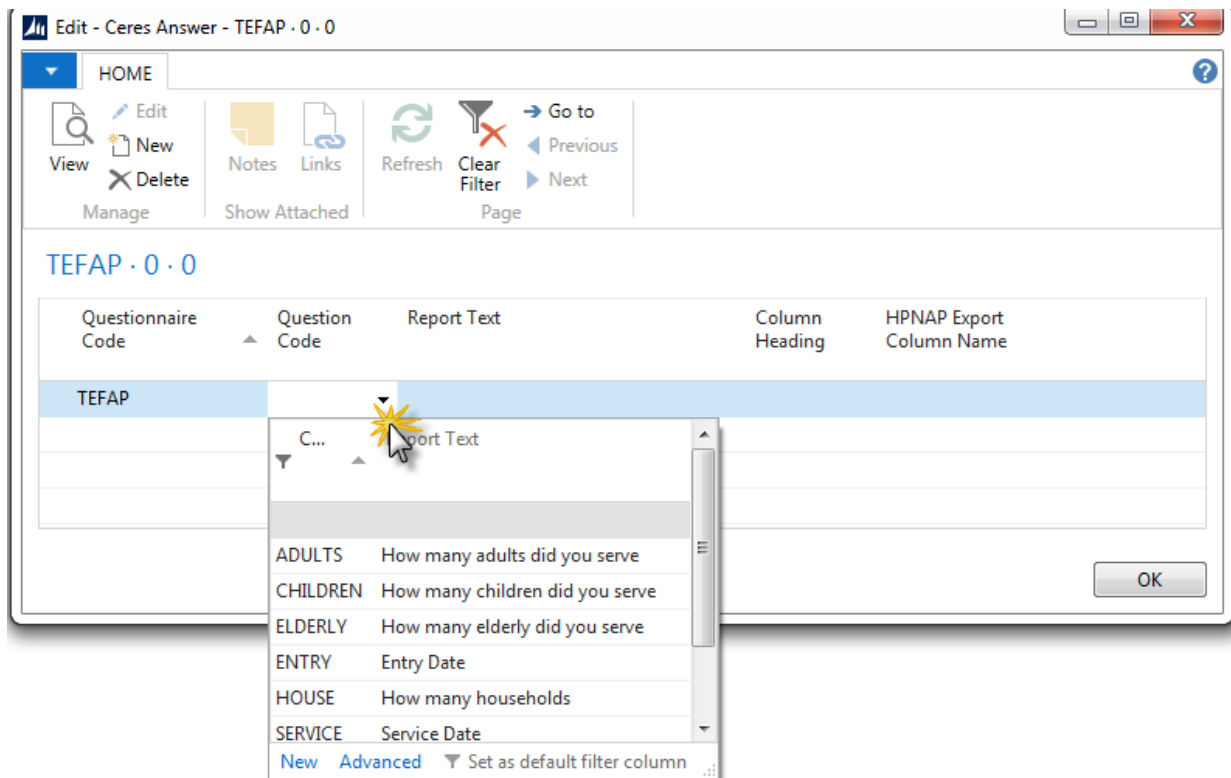


6. If Answers have already been defined for this Questionnaire, they will be displayed for edit purpose.

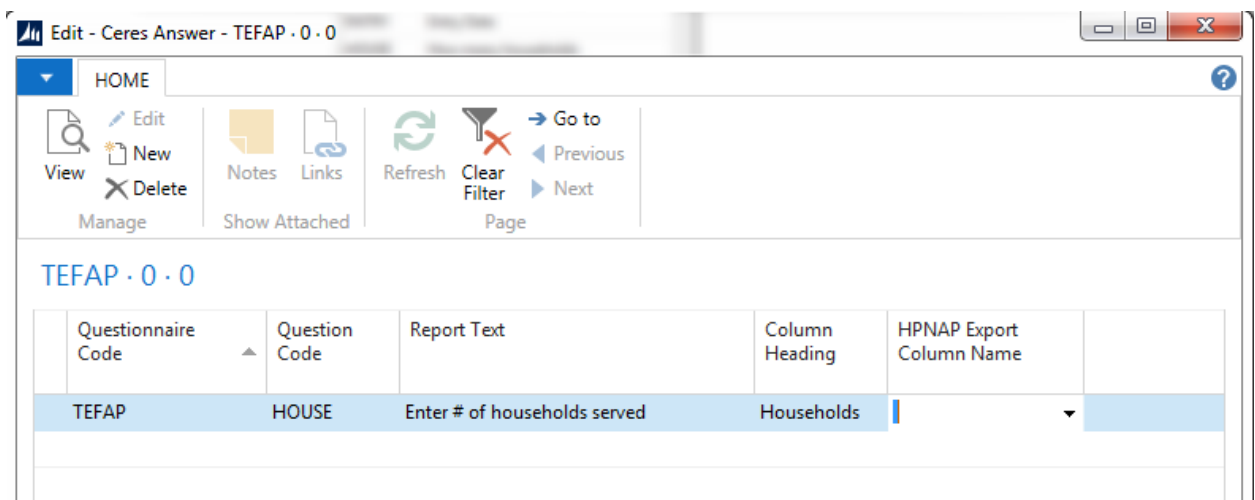
7. To add a new answer click New



8. Then use the Assist Button to select a question from the defined Question List first.



9. Select the Question that is to be asked of the Agency. Here we've selected the HOUSE question. And then filled in the report text and Column Heading. For HPNAP reporting, select from the available choices for the HPNAP Export Column. If this is not for HPNAP reporting, leave this column blank.



10. Repeat steps 9 through 11 to add more answers to the Questionnaire. Once you have completed the answer portion of the Questionnaire click OK.

Edit - Ceres Answer - TEFAP · 6 · 10000

HOME

View

Edit

New

Delete

Manage

Notes

Links

Show Attached

Refresh

Clear Filter

Page

Go to

Previous

Next

TEFAP · 6 · 10000

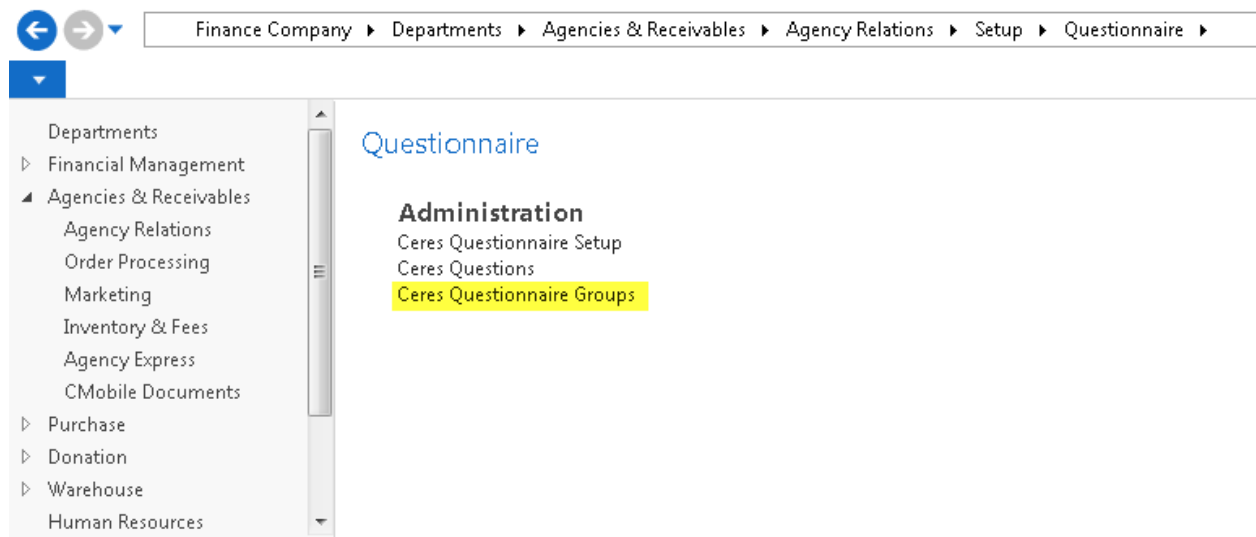
Questionnaire Code	Question Code	Report Text	Column Heading	HPNAP Export Column Name
TEFAP	HOUSE	Enter # of households served	Households	
TEFAP	ELDERLY	Enter Elderly Served	Enter Elderly S	
TEFAP	CHILDREN	Enter Childern Served	Enter Childer...	
TEFAP	TYPE	CSFP	CSFP	
TEFAP	TYPE	Child and Adult Care Food Prg	CACFP	

OK

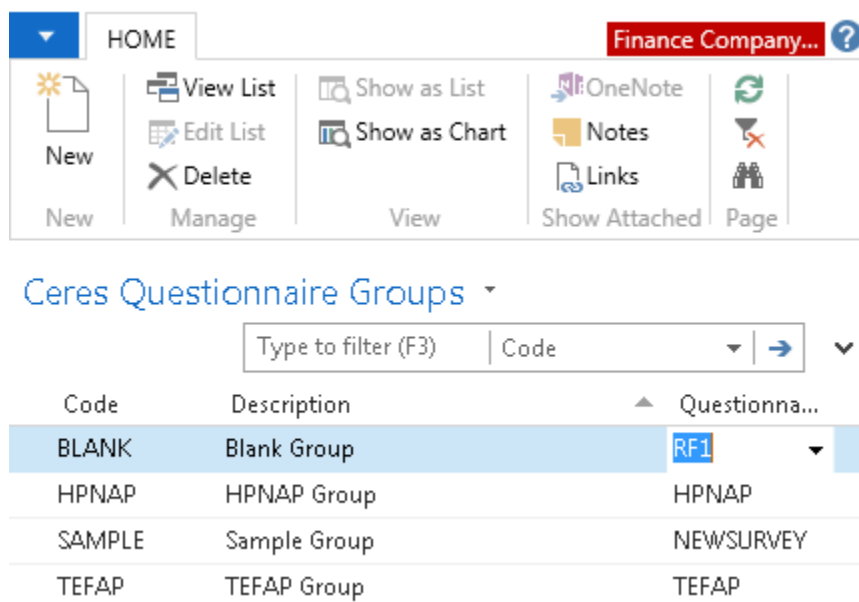
Setup of Questionnaire Groups

Questionnaire Group Codes provide the ability to associate a Questionnaire with one or more Agencies. Any Questionnaire not represented by a Questionnaire Group is said to be applicable to any Agency.

1. Questionnaire Groups may be accessed by selecting Departments → Agencies & Receivables → Agency Relations → Setup → Questionnaire → Ceres Questionnaire Groups.



2. Any existing Questionnaire Groups will be displayed.



3. Click the "New" icon to create a new Questionnaire Group.
4. Fill in the information as necessary.

Code: Enter a unique code to identify the Questionnaire Group.

Description: Enter a description of you choosing.

Questionnaire Code: Select an existing Ceres Questionnaire.

Note: Inserting, modifying, deleting, or renaming a Ceres Questionnaire Group will queue a web update for the related Ceres Questionnaire so that Agency Express is updated to reflect the appropriate Survey's for the Programs.

5. Lastly, for each Agency to which the Ceres Questionnaire applies, specify the Ceres Questionnaire Group Code and AE Quest. Applicable Date on the Information FastTab of the Agency Card.

Note – The “AE Quest. Applicable Date” is used during Survey Compliance reporting. Only Agencies having an “AE Quest. Applicable Date” of less than the current date will be evaluated for Survey Compliance.

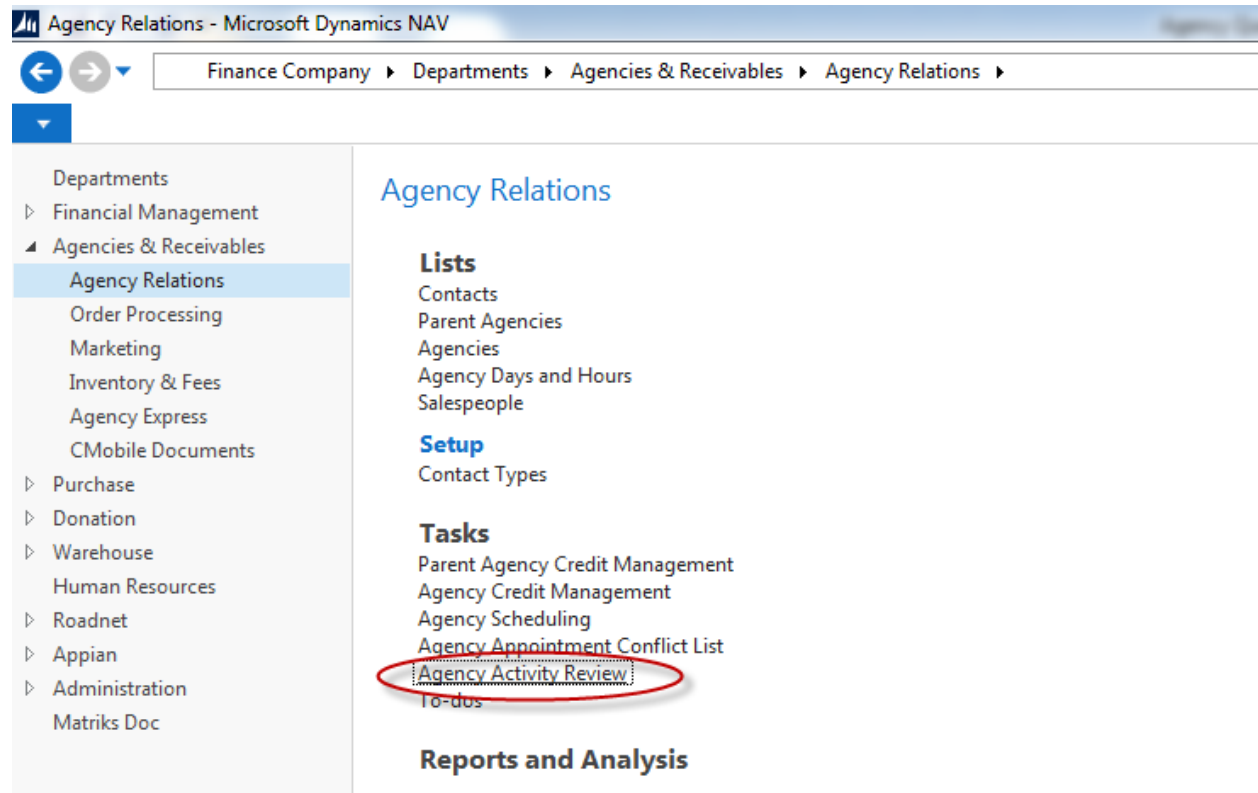
Information	
Permit Web Orders:	<input checked="" type="checkbox"/>
AE Survey Online Order Status:	Enabled
AE Quest. Applicable Date:	
Agency Group Code:	0
Ceres Questionnaire Grp. Code:	
Survey Group Code:	
Service Areas:	
Product Sources:	
Funding Sources:	
Client Records Maintained:	<input type="checkbox"/>
UNC Food Bank ID No.:	
SDO:	<input type="checkbox"/>
Food Bank Program:	<input type="checkbox"/>
Statement URL:	
Geographical Location Code:	
Metropolitan Area Code:	
FBC Program Type:	ON-SITE FD
FBC Size Code:	
Mobile Pantry:	<input checked="" type="checkbox"/>
CMobile Related:	<input type="checkbox"/>
Exclude from Compliance:	<input type="checkbox"/>
Federal Congr. Dist. Code:	
State Congr. Dist. Code:	
Senate District:	
City Council District:	
Ward:	
School District:	
Attribute Count:	1
Affiliation Count:	0
Tier Count:	0

Entry of Agency Responses

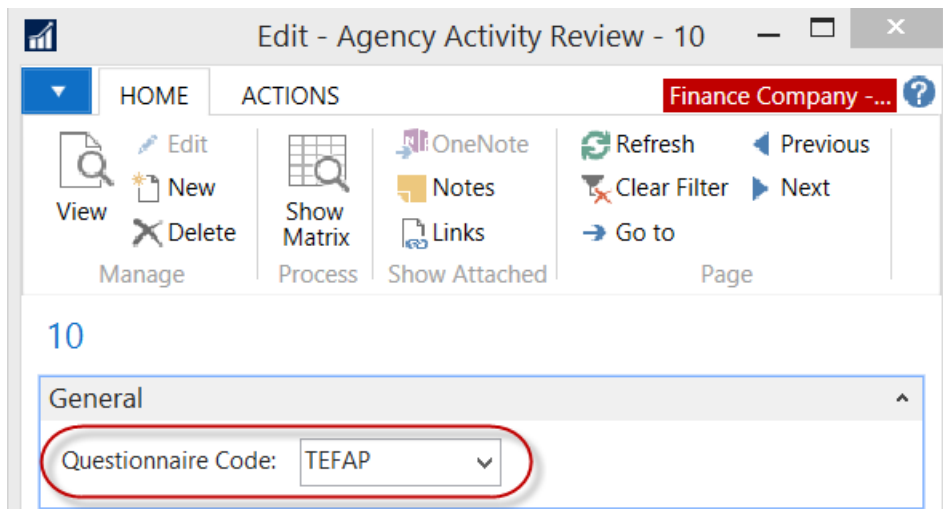
Entry from the Task Menu

Entry from the Task Menu allows the entry of responses from multiple Agencies at once.

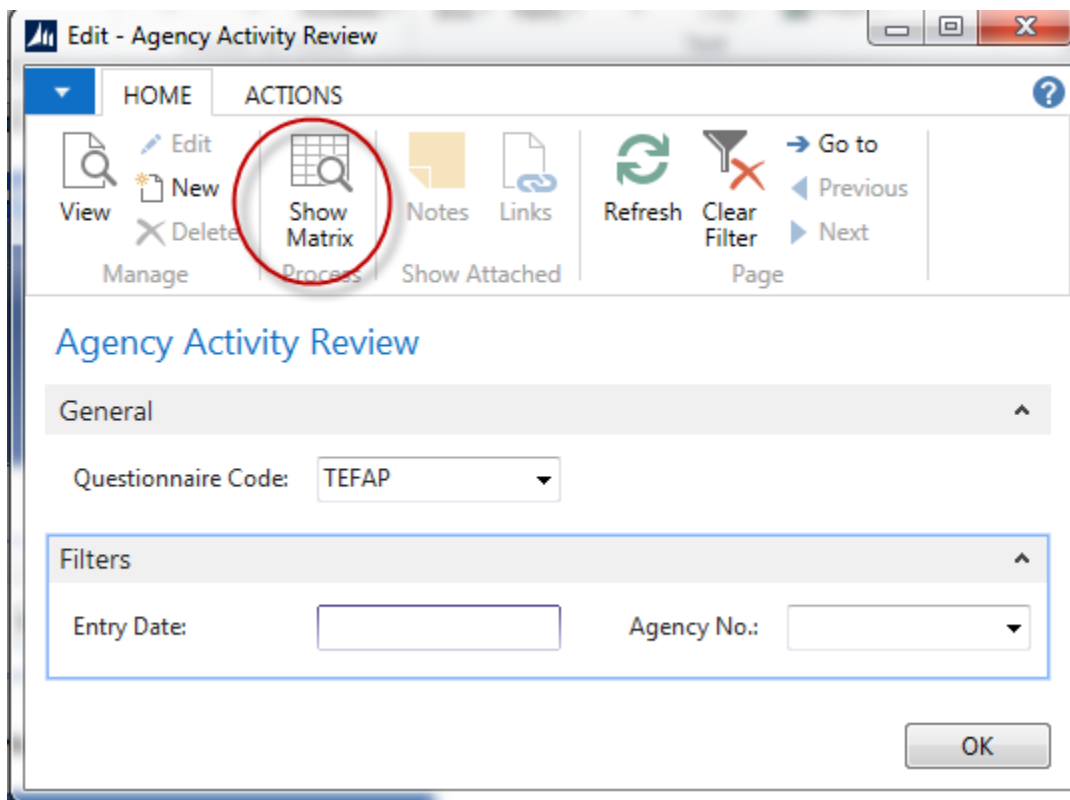
1. The actual data entry of the Agency Review can be accomplished from either the Agency Card or from the menu. To access from the menu go to Departments → Agency & Receivables → Agency Relations → Tasks → Agency Activity Review.



2. Select the Questionnaire you wish to record activity for. You can enter Code if you know it or use the Assist Button to view a list of the defined Questionnaires in Ceres.



3. Click on Show Matrix.



4. Select Home → New to add a new review.

Edit - _Agency Activity Review Matrix - TEFAP

HOME

View

New

Delete

Notes

Links

Refresh

Clear Filter

Go to

Previous

Next

Manage

Show Attached

Page

TEFAP

Agency No.	Service Date	Submis... Date	Entry Date	Agency Name	FBC Count Code

- Enter the information as required by the Questionnaire. The information required here is dependent upon the setup of the Questionnaire however all Questionnaires will require at least the Agency No., Service Date and Entry Date. Decimal answers will allow the entry of a number while multiple choice answers will be presented as a check box that the user can select the appropriate answer.

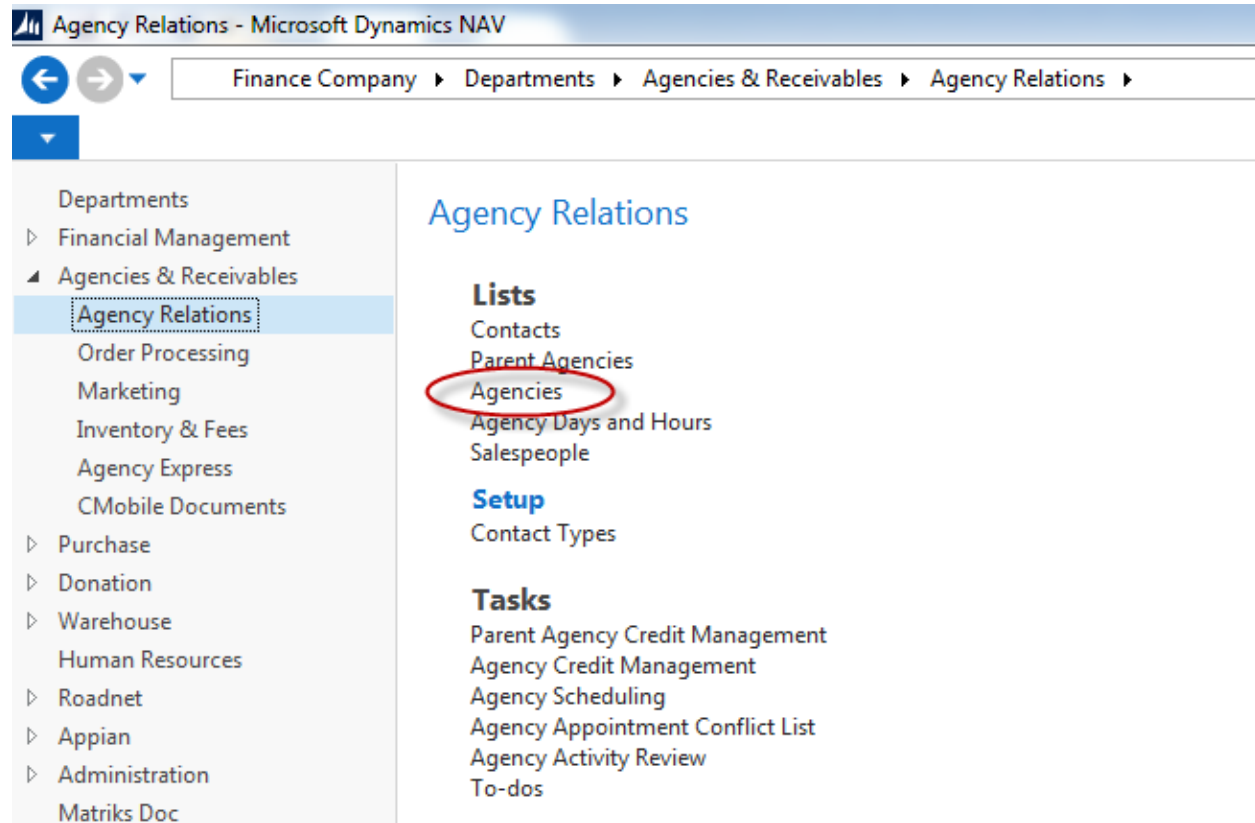
TEFAP

Agency Name	FBC County Code	FBC Agency Category Code	Parent Agency No.	Households Households	Elderly Enter Elderly S	Children Enter Childern	Agency Type CSFP	Agency Type CACFP
The Salvation Army	MO-JACKSON	SUBSTANCE	1884	6	2	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Access from the Agency Card

Entry from the Task Menu allows the entry of responses for one specific Agency.

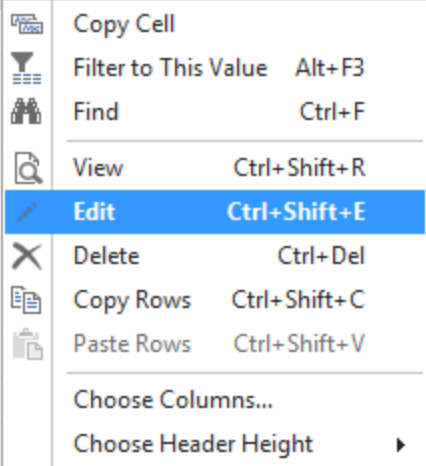
1. To access from the agency card, go to Departments → Agencies & Receivables → Agency Relations → Agencies



2. Select the Agency you wish to review by right-clicking on it and choosing edit (or by double clicking on the Agency Number).


Agencies ▾

No.	Name	Address
C1722	The Salvation Army	6723 Stat
C1724		
C1822		
C1936		
C1937		
C3001		
C3002		
CL0001		
CL0002		
CL0003		
CL0004		



- Copy Cell
- Filter to This Value Alt+F3
- Find Ctrl+F
- View Ctrl+Shift+R
- Edit Ctrl+Shift+E**
- Delete Ctrl+Del
- Copy Rows Ctrl+Shift+C
- Paste Rows Ctrl+Shift+V
- Choose Columns...
- Choose Header Height ▶

3. Select Navigate → Agency → Agency Activity Review



HOME

ACTIONS

NAVIGATE

REPORT

Comments

Dimensions

Contact

Agency Training

Agency Certifications

Shoppers

Matrix Documents

Agency Activity Review

Agency Attributes

Ledger Entries

Leased Storage Entries

Statistics

Entry Statistics

Fees & Pounds

Agency

History

C1722 · The Salvation Army

- Fill in the Questionnaire you wish to enter or view. Then click on Show Matrix.

Edit - Agency Activity Review - TEFAP

HOME ACTIONS

View Edit New Delete Show Matrix Notes Links Refresh Clear Filter Go to Previous Next

Manage Process Show Attached Page

TEFAP

General

Questionnaire Code: TEFAP

Filters

Entry Date: 08/19/14 Agency No.: C1722

OK

- All previous reviews for this Questionnaire will be displayed for review.

TEFAP · C1722 · 8/19/2014 · 8/19/2014

Agency No.	Service Date	Submis... Date	Entry Date	Agency Name	FBC County Code	FBC Agency Category Code	Parent Agency No.	Households Households	Elderly Enter Elderly S
C1722	8/19/2014	8/19/2014	8/19/2014	The Salvation Army	MO-JACKSON	SUBSTANCE	1884	6	2

- To enter a new review, select Home → New.

Edit - Agency Activity Review - TEFAP

HOME ACTIONS

View Edit New Delete Show Matrix Notes Links Refresh Clear Filter Go to Previous Next

Manage Process Show Attached Page

TEFAP · C1722 · 8/19/2014 · 8/19/2014

- Enter the information required by Questionnaire. The information required here is dependent upon the setup of the Questionnaire however all Questionnaires will require at least the Agency No.,

Service Date and Entry Date. Decimal answers will allow the entry of a number while multiple choice answers will be presented as a check box that the user can select the appropriate answer.

[TEFAP · C1722 · 7/31/2014 · 7/31/2014](#)

Agency No.	Service Date	Submis... Date	Entry Date	Agency Name	FBC County Code	FBC Agency Category Code	Parent Agency No.	Households Households	Elderly Enter Elderly S
C1722	7/31/2014	7/31/2014	8/19/2014	The Salvation Army	MO-JACKSON	SUBSTANCE	1884	12	4

Related Topics:

1. Agency Overview
2. Agency Profiles
3. Agency Groups and Qualifiers
4. Agencies UNC Activity Status by Group
5. Agency Questionnaires and Agency Express 3