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.

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▷ Warehouse
    Human Resources
▷ Roadnet
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▷ Administration
    Matriks Doc

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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
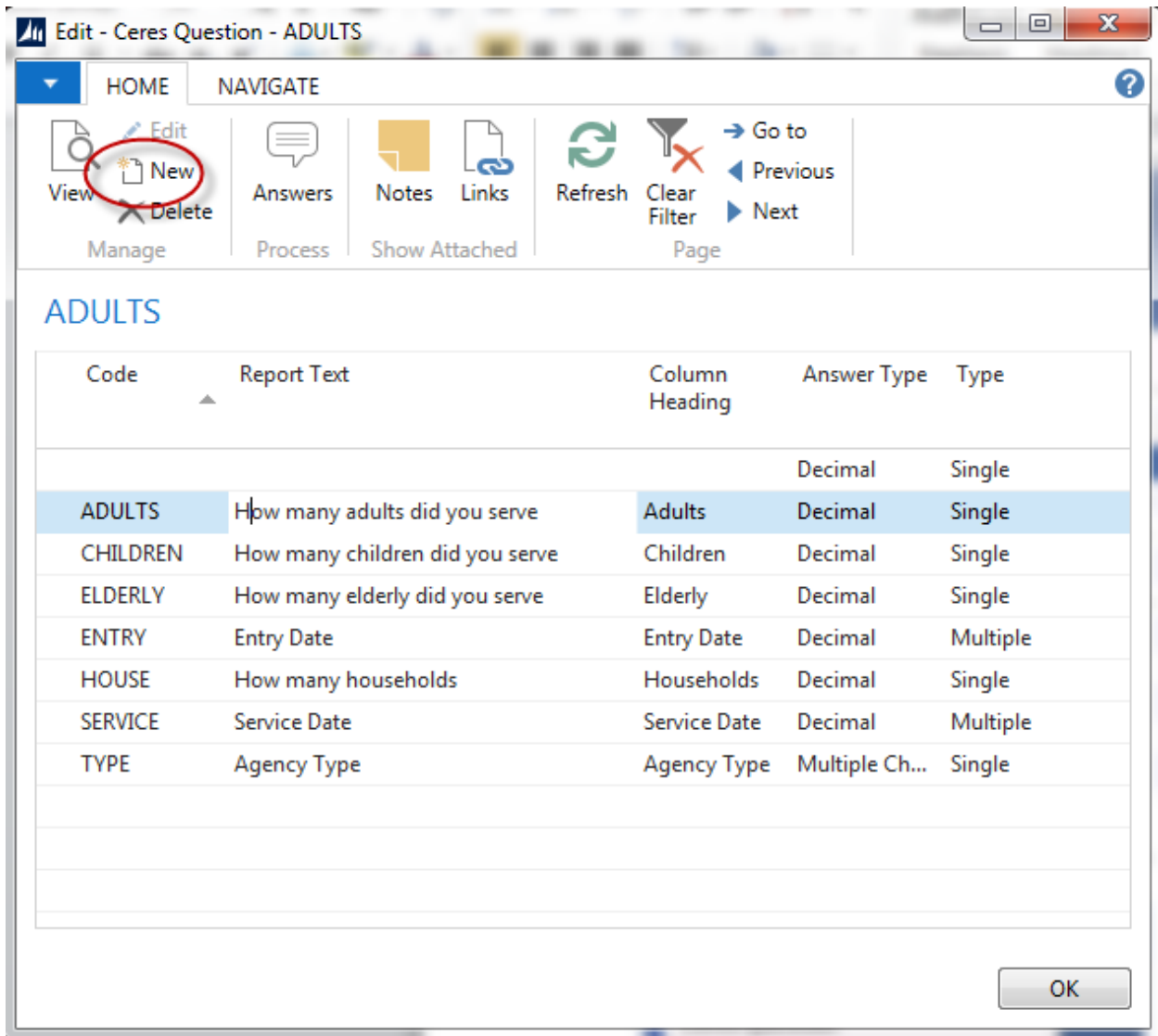
Questionnaire
Questionnaire Setup
Ceres Questions

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

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.

To create a new Questionnaire, choose Actions → New

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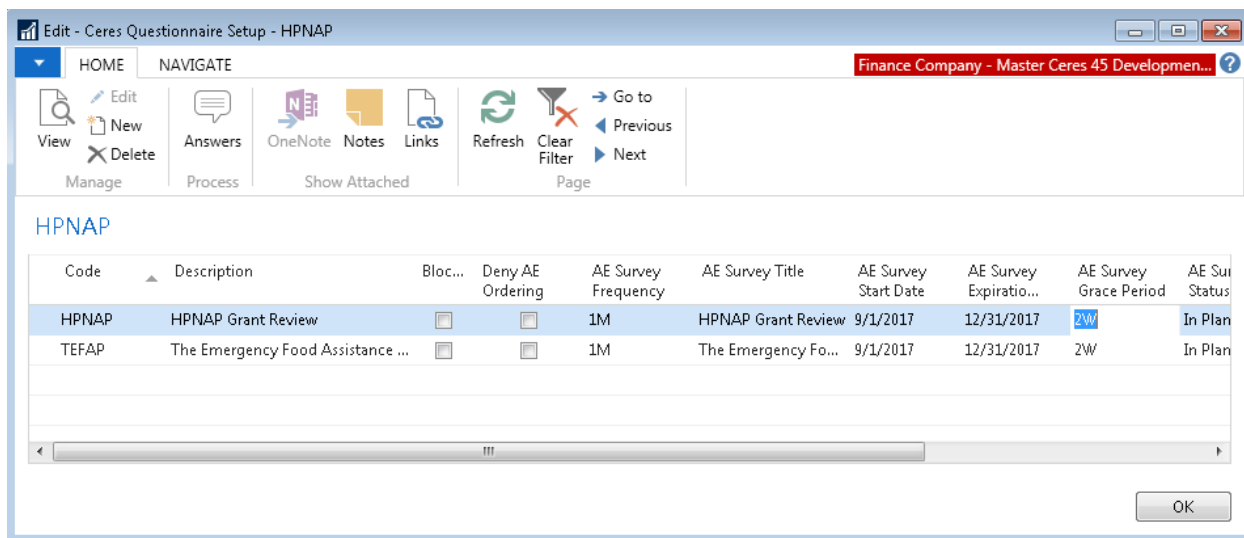
Last Modified By: A system controlled field that records User ID for the user that last modified the questionnaire.

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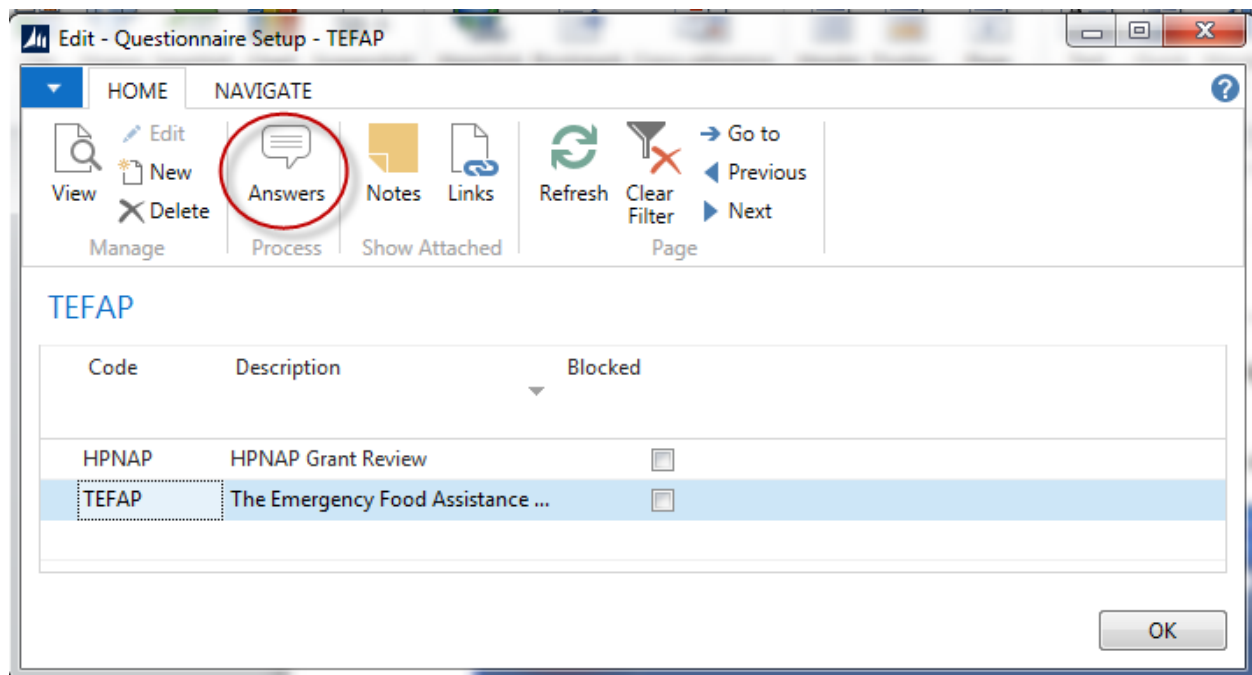
3. Here we have created a new Questionnaire called TEFAP.

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...
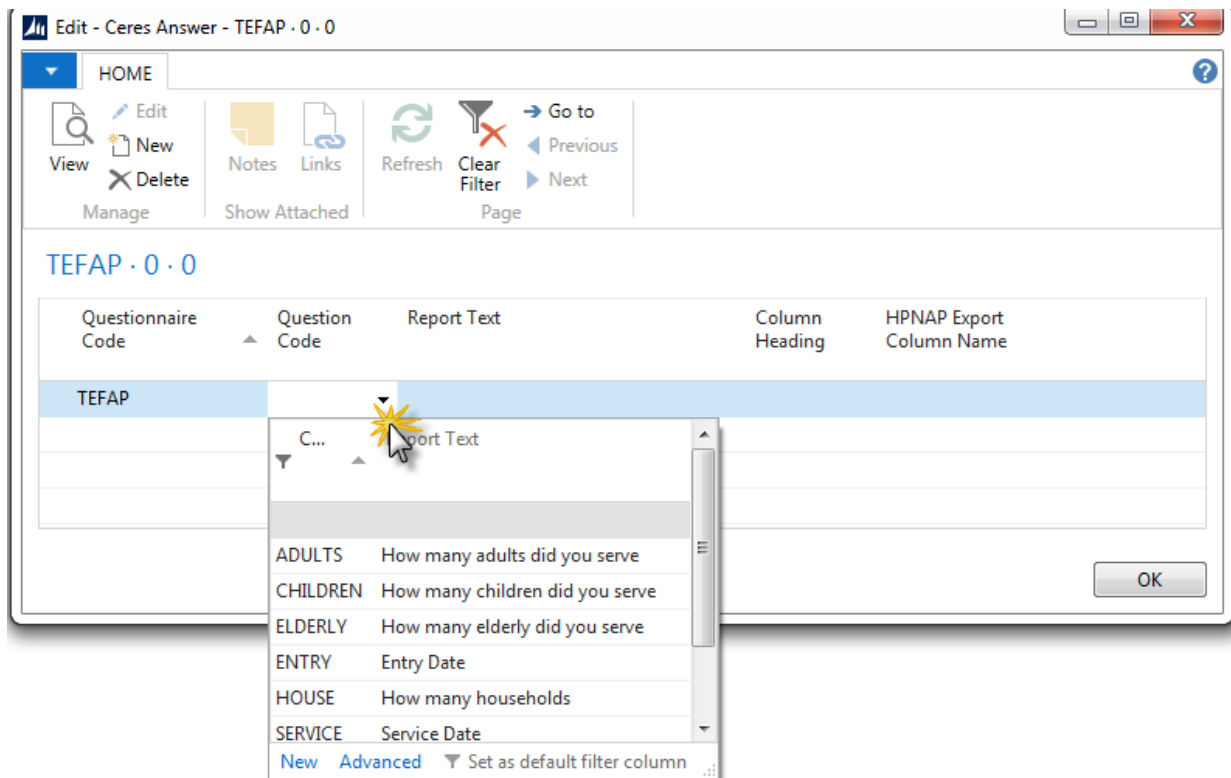

6. If Answers have already been defined for this Questionnaire, they will be displayed for edit purpose.

7. To add a new answer click New
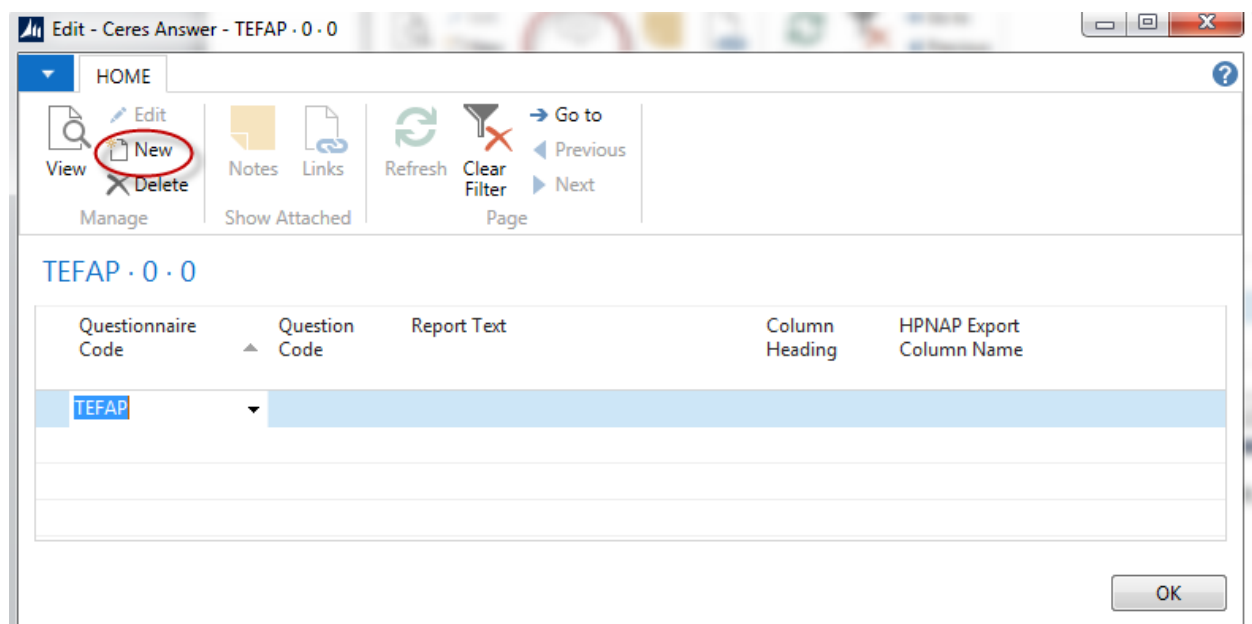
8. Then use the Assist Button to select a question from the defined Question List first.

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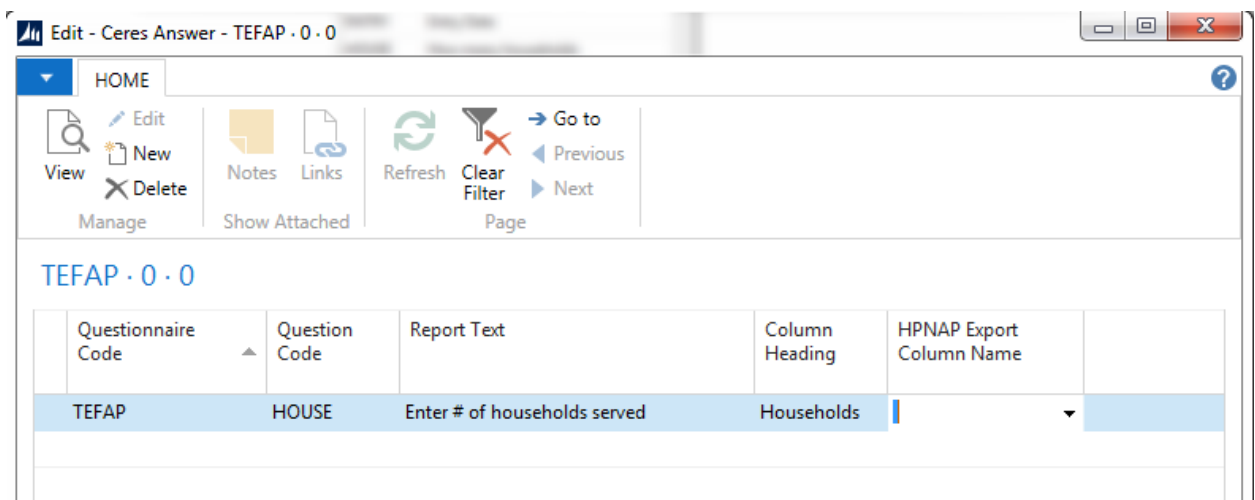
10. Repeat steps 9 through 11 to add more answers to the Questionnaire. Once you have completed the answer portion of the Questionnaire click OK.

Edit - Ceres Answer - TEFAP · 6 · 10000

HOME

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

Manage | Show Attached | Page

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.
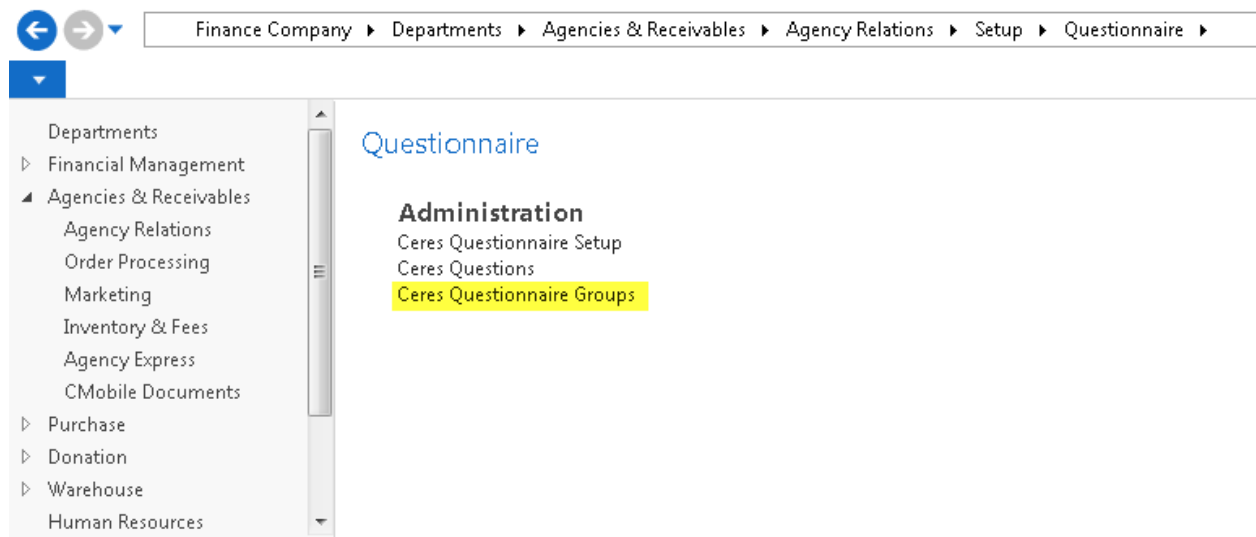
2. Any existing Questionnaire Groups will be displayed.
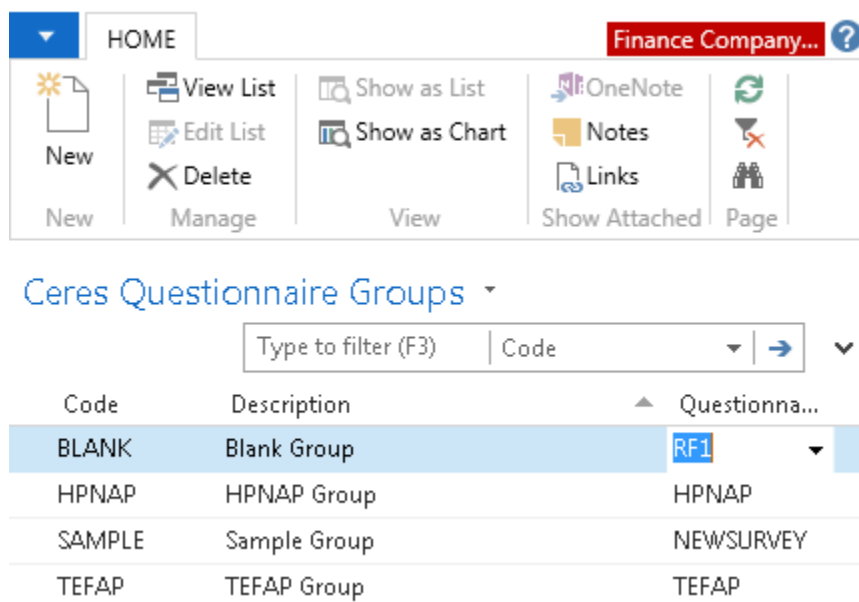
3. Click the "New" icon to create a new Questionnaire Group.

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 AI 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.
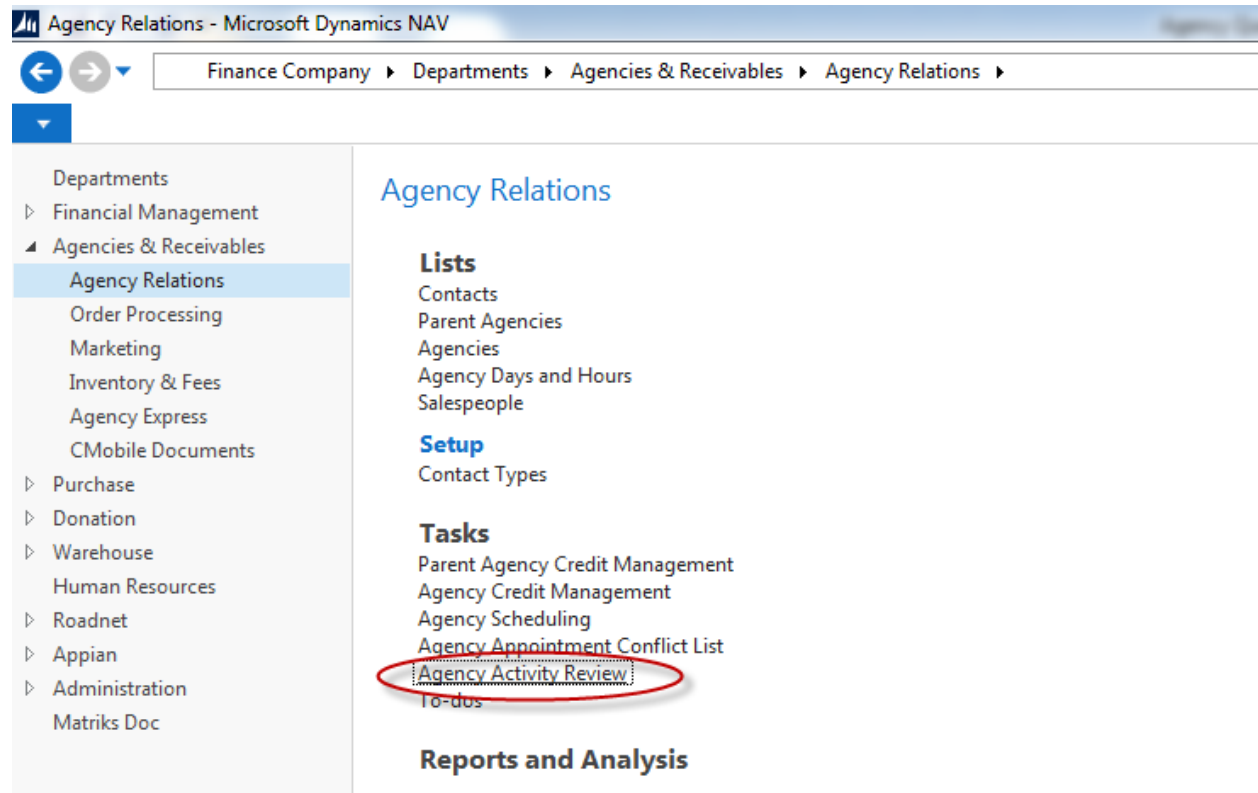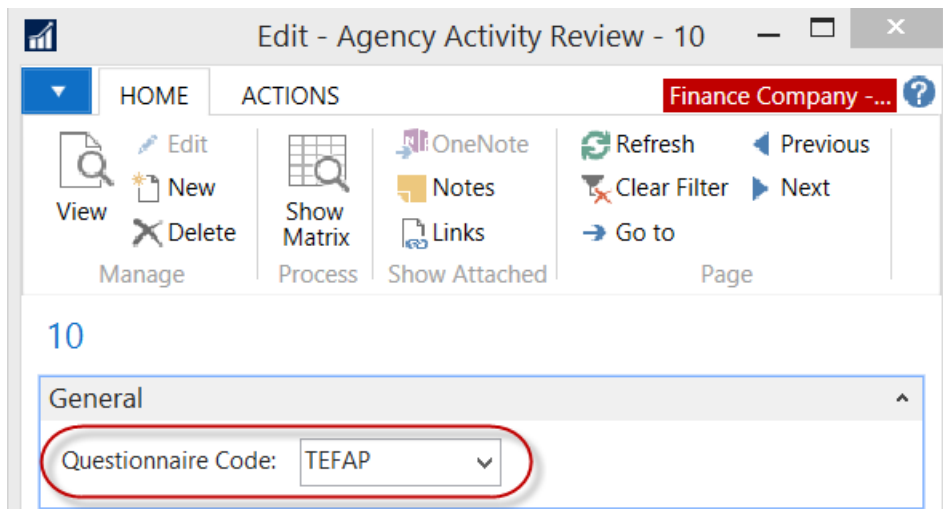
Entry of Agency Responses

Entry from the Task Menu

Entry from the Task Menu allows the entry of responses from multiple Agencies at once.
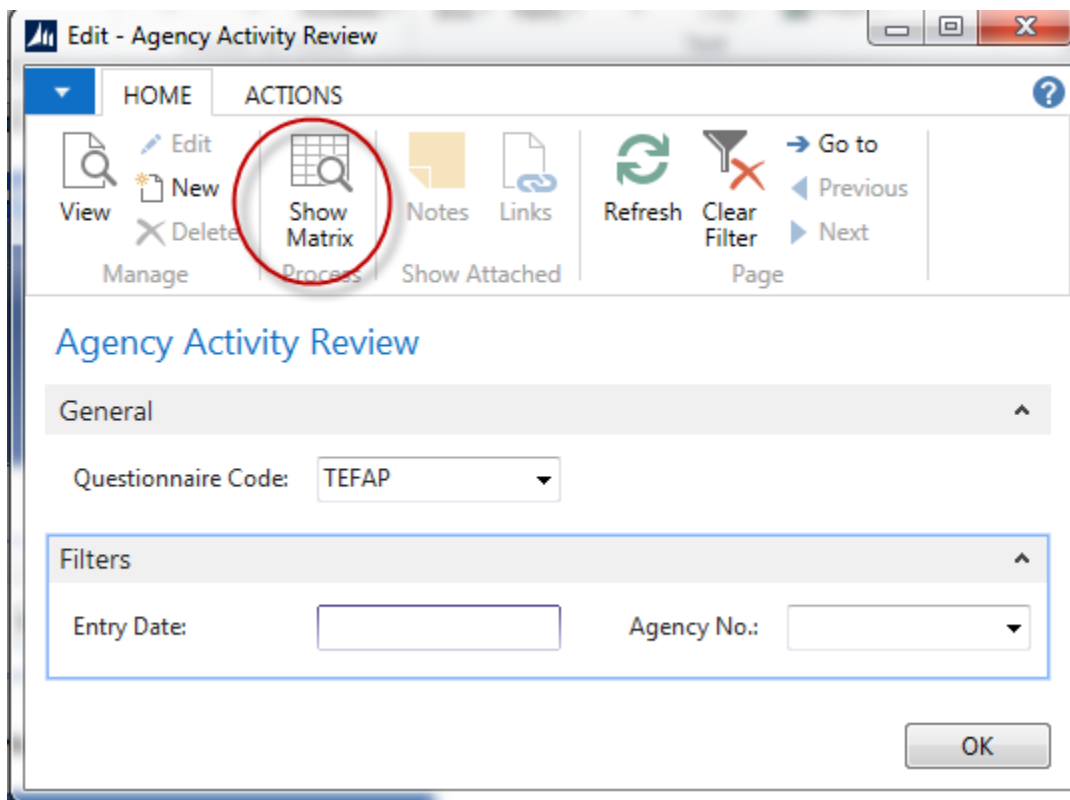
1. The actual data entry of the Agency Review can be accomplished from either the Agency Card or from the menu. To access from the menu go to Departments → Agency & Receivables →Agency Relations → Tasks → Agency Activity Review.

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.

5. 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	☑	☐

Access from the Agency Card

Entry from the Task Menu allows the entry of responses for one specific Agency.
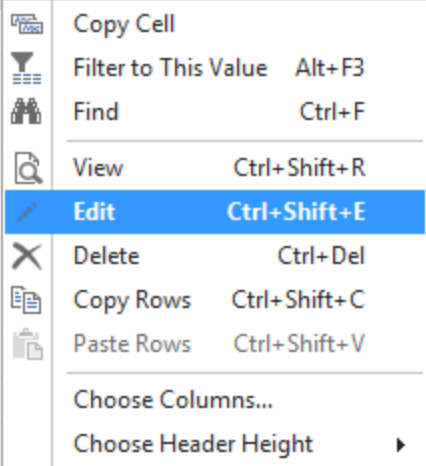
1. To access from the agency card, go to Departments → Agencies & Receivables → Agency Relations → Agencies
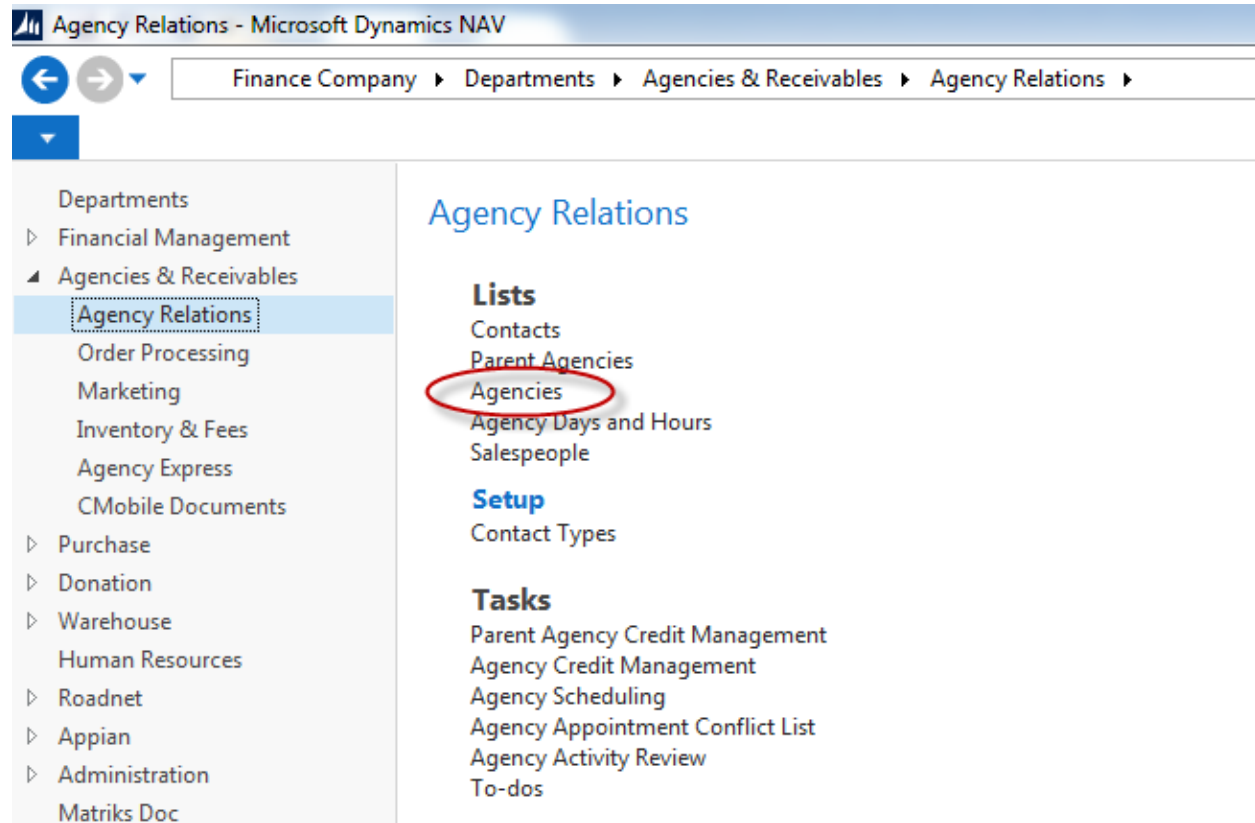
2. Select the Agency you wish to review by right-clicking on it and choosing edit (or by double clicking on the Agency Number).

3. Select Navigate → Agency → Agency Activity Review

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

5. 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

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

TEFAP · C1722 · 8/19/2014 · 8/19/2014

7. 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