Questionnaire Builder

Using **Course Builder** you will be able to easily create, edit and deliver questionnaires. Using this resource, administrators can manage their program's Annual Compliance Questionnaires and Needs Analysis Surveys. Questionnaire Builder also features a Public Survey section where administrators can create and launch anonymous customer surveys to their employees.

In Questionnaires > [Pick the appropriate questionnaire from the left hand menu]

Create a Questionnaire Shell:

- Click ⊕ to create a new questionnaire
- Complete the form with questionnaire details.
    - o Standard Forms will only be available for those disclosure services already turned on.
    - o PY is the program year of the questionnaire.
    - o Fields with * are required
- Best Practice: Before you begin, create a question and answer 'road-map.' Make sure it includes all of the logic and flagged items you'd like to include in your questionnaire.
- Click Add when form is complete.

Questionnaire Dashboard:

- Click ≡ at the top of the screen to view more options:
    - o Update
        - ▪ Title
        - ▪ Standard Form Inclusion
        - ▪ Active
        - ▪ Program Year
    - o Duplicate
        - ▪ Makes another copy of the questionnaire
    - o Notification Emails
        - ▪ Turn notification emails on and off
        - ▪ Specify administrators and supervisors who should receive emails

Adding Questions:

- Click ≡ in the General heading and select Add Question to create a new question
- Complete the form
    - o Multiple question types are available; Click here to view your options.
    - o Fields with * are required
- Click add when question is complete

Adding Answers:

- Complete the form with the desired answer
  - This option will not be available if the Question Type chosen is Date Picker, Percentage, Text Box, Text Area, Address, or Electronic Signature
- Choose if the Notification Flag will be on or off
  - If the flag is on the administrator will receive an email alerting them of the user's answer.
- Continue adding answer options as needed.
  - Jump logic can only be turned on after the question is built through the Edit menu
- Click ⊕ to add another question or [TOC] to return to the questionnaire dashboard
- Click ⊘ to edit the question

Jump Logic:

- Click ✖ to view question details
- Click [OFF] to turn jump logic on for the question
- Choose the answer that triggers the jump and then the question number it should jump to when that answer is chosen.
- Click 'Update" when finished

Editing Content:

- Click ✖ to view question details
- Click ⊘ at the top of the screen to edit the question
  - You can delete a question in the edit screen if the questionnaire has not been completed by any users
- Click ⊘ next to each answer to edit the answer
- Click the arrow ⌃ or ⌄ icons to move a question up or down in the list
- Click ⊕ to add another answer

Repeat 'Adding Questions' and 'Adding Answers' as needed to complete creating the questionnaire.

Assigning Students:

- Click ▤ to access Questionnaires
- Pick the appropriate questionnaire from the left hand menu
- Click ▤ to view more options:
    - TOC
        - View questions within the questionnaire
    - Responses
        - View user responses to the questionnaire
    - Assign
        - Assign the questionnaire to users
        - Select the check-box next to the user(s) you wish to assign
        - Click Assign at the bottom of the user list.

❓ Additional Help

At anytime throughout your program you can contact your Account Executive or utilize our support center. For more information about Quest CE or our products visit www.questce.com.

Support:

- Call (877) 593-3366
- Available Monday through Friday 8am – 5pm (CST)
- Email support@questce.com