CSSEA
Community Social Services
Employers' Association of BC

A Guide for Agency Users

SOCIAL SERVICES
WORKFORCE INFORMATION SYSTEM
(WFIS)

How to Fill-in a Survey

May 2014

Contents

Document Control

Date	Version	Changes Made By	Details
May 21, 2014	Draft	Ibex Consulting Inc.	Initial draft
	V1.0	Ibex Consulting Inc.	Initial Release
			1.

About this guide

This document is a supplemental guide to the *CSSEA Agency User's Guide for Social Services Workforce Information System (WFIS))* for Agency Users to use as a reference for filling in a survey. This how-to guide is not survey specific.

You should be familiar with the Social Services Workforce Information System program before using this guide.

Surveys

Surveys are created by CSSEA in consultation with Government Agencies. Surveys are attached to an Agency. Surveys may be repeated for different reporting periods.

Survey Workflow
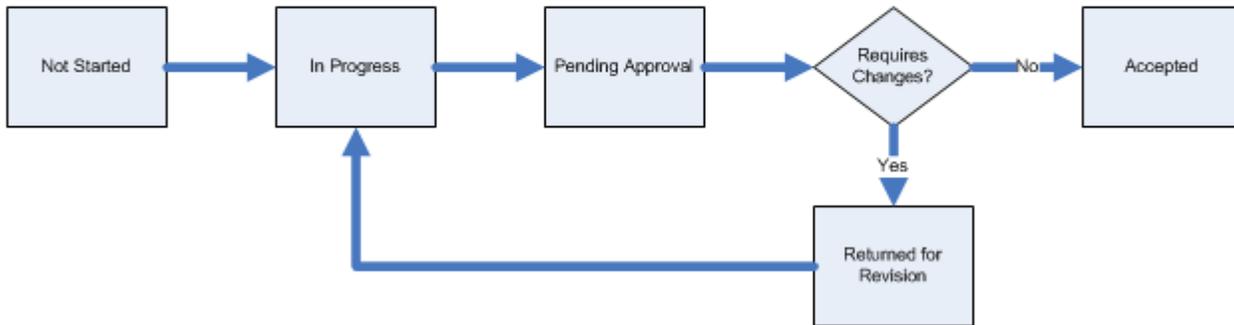
Surveys have a well-defined workflow. You can see what stage a survey is at in the workflow by looking at the survey's status. The **Survey Status** filter option allows users to access surveys that are completed, waiting for approval, partially completed or not yet started.

To access the surveys, from the menu click **Surveys**.
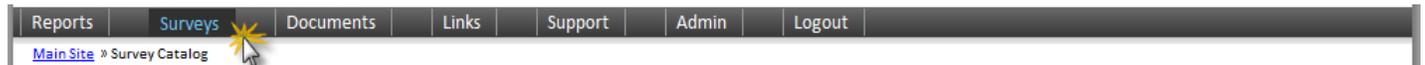
Filling-in a Survey

To fill in a survey, find the survey, find the survey section(s) and then answer the survey questions.

Finding the Survey

By default, the user will see a list of all of the available surveys for their Agency. A list of available surveys is shown on the Survey Catalog screen. You may filter the list of surveys that you see by identifying any of the parameters.   See the *Survey Parameter* section for detailed parameter information.

Filter parameters

Filter Surveys	
Employer Class: ⓘ	CSSEA Member ▾
Contact: ⓘ	Sample Agency ▾
Survey Name: ⓘ	-- All -- ▾
Date: ⓘ	[14] -to- [14] (yyyy-mm-dd)
Survey Status: ⓘ	-- All -- ▾
	↻ Refresh

List of available surveys

Surveys   Excel   1

Actions	Class	Employer	Survey Name	Date	Status
📄 Fill	CSSEA Member	Sample Agency	2012-2013 Compensation and Employee Turnover	2013-12-31	Not Started
📄 Fill CSSEA Member		Sample Agency	2012-2013 Compensation and Employee Turnover	2012-12-31	Returned for Revision
📄 Fill CSSEA Member		Sample Agency	Wages and Benefits - Bargaining Unit Employee	2010-12-31	Returned for Revision

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From the list of available surveys, click the **Fill** button to display the Survey Edit screen.

Survey Parameters

Parameter	Parameter Details
Employer Class	This defaults to *CSSEA Member*.
Contact	For Agency users, this defaults to your agency.
Survey Name	To select a survey, click the **Survey Name** arrow to see more surveys.
Date	Enter a date range to filter the surveys by survey date. Note that if you enter an invalid date an error message will show (***) and require that you correct the date before continuing.

The dates can be entered in two ways. You can:
1. In the *from-date* **Dat**e box or in the *to-date* **Dat**e box, type a date. The date must be in the yyyy-mm-dd format.
or |

Parameter	Parameter Details
	2. Use the date button feature. To use this feature, click [14], select the year, select the month and then select the day of the month.

For example, to access 2010 surveys:
- Click the *from-date* **Date** button, select 2010, select **Jan**, and then select **01**.
- Click the *to-date* **Date** button, select 2010, select **Dec**, and then select **31**.

Date Tips:
If you enter a *from-date* and leave the *to-date* blank – the *to-date* will default to today's date. Any survey with a date greater than or equal to the *from-date,* up to and including today's date will be listed.

If you enter a *to-date* and leave the *from-date* blank – any survey with a date up to and including the *to-date* will be listed.

If you change the dates, remember to click **Refresh** to apply the date filter to the list of available surveys. |
| Survey Status | To filter surveys by their status, click the **Survey Status** arrow to see more statues.

The **Survey Status** option allows users to view surveys that are completed, waiting for approval, partially completed or not yet started. Definitions for the dropdown menu options include:

All - Will include all survey status types in the search.
Accepted - The Agency has reviewed and verified the information that was entered into the survey. This means the survey is complete.
In Progress – Answering survey questions has begun but not finished. The survey has not been sent to the Agency for review.
Not Started - No information has been entered into the survey.
Pending Approval - The survey is nearly complete. It requires the Agency to review, provide any missing data and verify the survey.
Returned for Revisions - Changes are required. The survey will need to be re-accepted by the Agency once the changes have been made. |

Starting a New Survey

By default, the Survey General Information section is shown. When you start a new survey, you will see the red message *Survey cannot be filled until the status is changed to "In Progress"*.

A new survey with the Survey Status of **Not Started** does not have any survey sections. Before you are able to fill-in survey section information, you must set New Survey Status to **In Progress.**

Once **In Progress** is selected, the Survey Status will change to reflect this and the *New Survey Status* will have two new options to choose from: **Not Started** and **Pending Approval**

You are now ready to start filling-in survey sections.

Finding the Survey Section

To display a list of the survey sections, point to the **Section Menu** button.
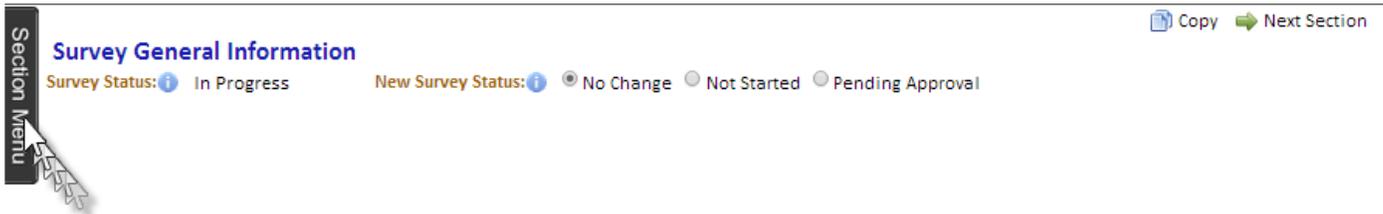
A list of the survey's sections is shown – this is called the section menu. A survey section that has been completed will display a green arrow symbol ꜱ✔ following the section title, while incomplete sections will display an incomplete symbol 🛈 at the end of the section title.
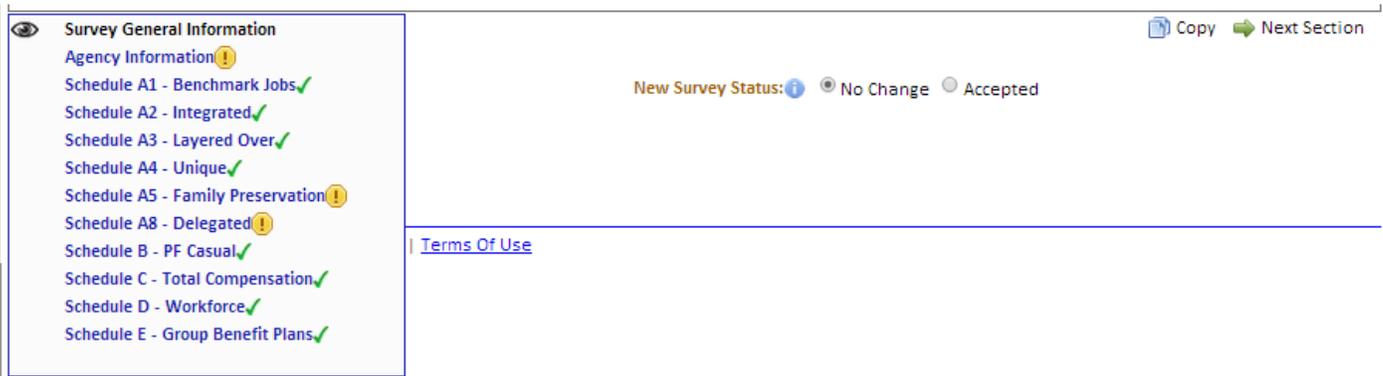
Navigating Through a Survey

A standard set of navigation options are available to help you move through the sections of a survey.

To…	Do this…
Display one section of the survey	On the section menu, click the title of the survey section
Return to the beginning of the survey sections	Click **Survey General Information**
See the previous section	Click **Previous Section**
See the next section	Click **Next Section**

A black eye symbol will appear at the beginning of the current section title that you are viewing.

To return to the list of available surveys, click the **Back** button.

Answering Survey Questions

Once you have navigated to the appropriate section, you can begin answering the survey questions.
By default, the Survey Applicability is set to **Applicable** for each of the section topics and the questions within that topic are available for answering.

You can choose not to answer some or all of the questions within a section topic if you determine that the questions are not relevant to your agency. Or, you may not have the necessary information at this time to answer a question.

Select the appropriate Survey Applicability and move on to the next question. You must fill-in all questions and sections of a survey **or** choose the appropriate Survey Applicability. Choosing anything other than **Applicable** will make the question unavailable for answering.

Choose…	When…
Applicable	The questions listed below are applicable to this agency and date.
Not Applicable	The questions listed below do not have relevance for this agency and date.
Not Available	The questions listed below apply to this organization and date; however, the answers are not available. Use this response if the answers will not be available in the short term and you still want to mark the survey as complete.
Other	The questions listed below cannot be answered for the reasons specified in the comment box that will appear when this option is selected.

If you see a red asterisk (*) next to a label, that question is mandatory and an answer must be provided. The answer box will remain pink until filled-in.

To position questions in the section window use the Windows vertical or horizontal scroll bars, or rotate the mouse wheel button.

Information Bubbles

Quick access help or information may be available for the section, for a question and for a grid.

To access the help or information click the info icon ⓘ . A popup window called an information bubble will appear.

The answers to some survey questions may need to meet certain value criteria in order to pass validation. To access the question's answer criteria click the criteria icon⚙. A popup window called an information bubble will appear.

An information bubble will remain on the screen until you click the close button ✖ in the top right corner or until you click outside of the popup window.

Copying Survey Answers

A **Copy** function is provided to help you fill-in survey questions from the answers of another reporting period for the same survey. You can choose to copy all answers from a survey or answers from a single section. Typically, you would copy from an **Accepted** survey.
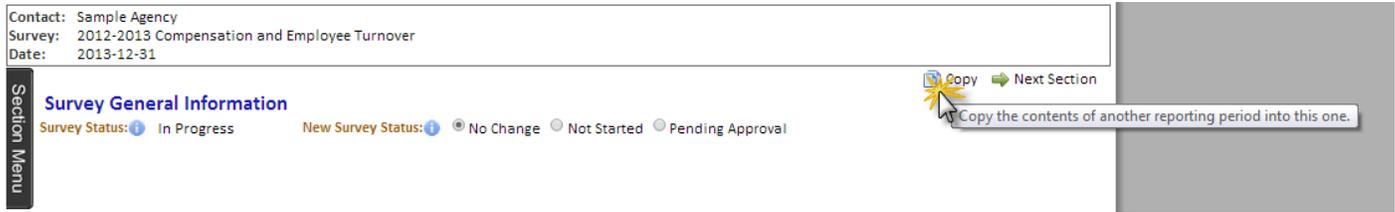
Copying All Answers from a Survey

This copy function is useful when most answers have not changed from the previous year's survey and only a few survey sections require updating.

To copy all answers from a survey, complete the following steps:

1. Find the survey that you want to copy answers into. The copy function is not available for **Accepted** surveys.

2. Navigate to that survey's Survey General Information section.

3. Select the copy options. To display the Select Copy Options screen, click **Copy**.

   o In the Scope field, choose **Entire Survey.**

   o Answered questions can be overwritten during the copy. To override answered questions, check **Overwrite Answers.**

4. Choose the survey that you want to copy answers from**.** To display the Copy From screen, click **Next.**

   o Use the filter parameters to find the survey that you want to copy answers from.

   o Choose the survey you want to copy answers from and click **Copy**. The Confirm Copy Options screen is displayed.

5. Confirm your copy options. To confirm the copy options you have selected, click **Finish.**

   o All answers are now copied into your survey

   o To return to the previous step in the copy function, click **Previous**.

Copying Answers from a Single Section

This copy function is useful when you want to copy answers from a single section of previous year's survey.

To copy answers from a single section, complete the following steps:

1. Find the survey that you want to copy answers into. The copy function is not available for **Accepted** surveys.

2. Navigate to the survey's section that you want to copy answers into.

3. Select the copy options. To display the Select Copy Options screen, click **Copy**.
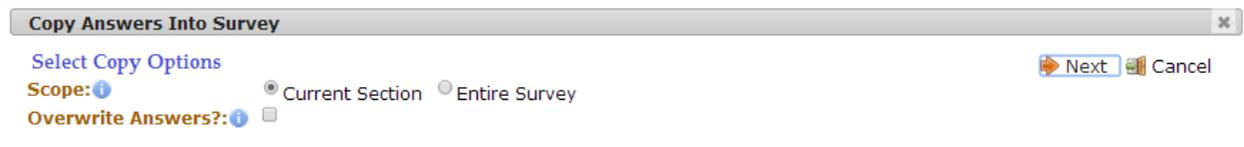
   o In the Scope field, choose **Current Section.**

   o Answered questions can be overwritten during the copy. To override answered questions, check **Overwrite Answers.**

4. Choose the survey that you want to copy answers from. To display the Copy From screen, click **Next.**

     o   Use the filter parameters to find the survey that you want to copy answers from.

     o   Choose the survey you want to copy answers from and click **Copy**. The Confirm Copy Options screen is displayed.

5.   Confirm your copy options. To confirm the copy options you have selected, click **Finish.**

     o   All answers are now copied into your survey

     o   To return to the previous step in the copy function, click **Previous**.

Warning: There is no "undo" action when copying answers. Manually deleting or adjusting answers is required if necessary to fix any mistakes or you can overwrite values within a reporting period by making another Copy.

Completing a Survey

Once all applicable questions within a survey have been answered, the survey is available for approval. The system will check to see if all applicable questions have been answered.

To move your survey to the next stage in the survey workflow, change the *New Survey Status* to **Pending Approval**. The **Pending Approval** status indicates to other users that all applicable survey questions have been answered and needs to be verified by the Agency.

An Agency user can send a survey for approval but have it sent back to them for revision. The Agency would change the Survey Status to **Returned for Revision**. The Agency user would make the necessary changes and then re-send the survey for approval.

Once the answers have been reviewed and verified, the survey is complete and you can then select **Accepted** and close the survey.

Saving Survey Answers

Answer information is automatically saved. If you navigate to a different page or close your browser you will not lose your answers.

Deleting a Survey

To delete a survey and all of its sections, change the survey Status from **In Progress** to **Not Started**.

⚠️   Warning: Take care using this feature! – There is no Undo capability.

A warning window will appear asking if you want to continue with the delete. To keep your survey answers, click "cancel" or the close button, or to erase all answers within this survey click "OK".

Sample Warning Window

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