Qualtrics Survey Tool Tip Sheet

Records Management Self-Assessment (RMSA)

Do I need to complete the entire survey in one sitting?

No. You can exit the tool at any time. Your answers up to that point will save automatically when you exit the tool; there is no need to hit any SAVE button. When you are ready to finish the survey, click on the web link that was emailed to you when the survey first opened and finish entering your answers. Once you are satisfied with your answers, follow the directions to submit your response.

Am I able to change my answers before I submit my agency's response?

Yes. Click on the back button located at the bottom of your screen (within the tool). You are able to return to any page within the survey and change your answer. All answer changes must be made on the page containing that particular answer. Changes will be saved automatically. PLEASE NOTE: For the RMSA, the tool allows you to make changes all the way up to the screen previewing your response (before submission). Please read the instructions provided in the survey carefully when completing your agency's response.

Am I able to review my agency's answers before I submit our response?

Yes. After you have entered all your answers in the survey tool, Qualtrics will display your entire response so that you can review your answers before submitting. All changes/corrections must be made by hitting the back arrow button; you must return to the particular question/answer within the survey to make any changes.

Am I able to print my agency's RMSA response before submitting?

Yes. After you have entered all your answers in the survey tool, Qualtrics will display your entire response so that you can review your answers before submitting. Click on the "Download PDF" hyperlink in the upper right hand corner of the screen to download and print a PDF of your response.

Am I able to print my agency's response after submitting?

Yes. Once you have submitted your agency's response, Qualtrics will direct you to your response report (*score report*). Right click anywhere on your screen and select Print to print a copy of your agency's response/score report. In addition, you will also receive an email containing a URL that directs you to your completed survey (*without your agency scores listed*) where you will be able to download and print a PDF by clicking on the Adobe Acrobat icon in the upper right hand corner.

Federal Email Management Reporting

Do I need to complete the entire survey in one sitting?

> No. You can exit the tool at any time. Your answers up to that point will save automatically when you exit the tool; there is no need to hit any SAVE button. When you are ready to finish the survey, click on the web link that was emailed to you when the survey first opened and finish entering your answers. Once you are satisfied with your answers, follow the directions to submit your response.

Am I able to change my answers before I submit my agency's response?

> Yes. Click on the back button located at the bottom of your screen. All answer changes must be made on the page containing that particular answer. Changes will be saved automatically. PLEASE NOTE: Unlike the RMSA, in the Federal Email Management Reporting survey, you will only be able to change your answers up to the screen displaying the instructions for reviewing, submitting, and scoring. You will NOT be able to change your answers once you hit the next button on the instructional screen. Please read the instructions provided in the survey carefully.

Am I able to review my agency's answers before I submit our response?

> Yes. PLEASE NOTE: Unlike the RMSA, for the Federal Email Management Reporting survey, you must review your answers by hitting the back button at any point up to the review/submit/scoring instructions page. Qualtrics will NOT display a preview of your response before you submit. All changes/corrections must be made by hitting the back arrow button; you must return to the particular question/answer within the survey to make any changes.

Am I able to print my agency's response <u>before</u> submitting?

> No. PLEASE NOTE: Unlike the RMSA, there is no opportunity to print your agency's entire response before submitting. You will only be able to print your agency's response after you have submitted.

Am I able to print my agency's response <u>after</u> submitting?

> Yes. You will be able to download a PDF of your agency's response after you have submitted. Select "Download PDF" at the top of the screen or right click anywhere on the screen and select Print to print a copy of your agency's response. You will also receive an email containing a URL that directs you to your completed survey where you will be able to download and print a PDF by clicking on the Adobe Acrobat icon in the upper right hand corner.

Please contact rmselfassessment@nara.gov with any further questions.