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. Hit the NEXT button at the bottom of the page to ensure that your answers up to that point are saved 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 up through the DEMOGRAPHICS section (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. Unlike in previous years, you must hit the back button located at the bottom of your screen (within the tool) to review your current answers. There is no final preview screen. If you wish to make any changes, you must return to the particular question/ answer within the survey to make those corrections.

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

No. 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 reached the DOWNLOAD/SUBMIT screen at which point you can no longer go back to make changes.

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. If you forget to print a copy of your score report and need a copy of your response with the score included, please contact rmselfassessment@nara.gov.

Federal Electronic Records and Email Management Report

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

No. You can exit the tool at any time. Hit the NEXT button at the bottom of the page to ensure that your answers up to that point are saved 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: For the Federal Electronic Records and Email Management Report survey, you will only be able to change your answers up to the REVIEW screen (after the scoring section). You will NOT be able to change your answers once you hit the next button on the REVIEW 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: You must review your answers by hitting the back button at any point up to or on the REVIEW screen. Qualtrics will NOT display a preview of your response before you submit. All changes/corrections must be made by hitting the back button on or before the REVIEW screen.

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

No. There is no opportunity to print your agency's entire response before submitting. However, you will be able to print your agency's response after you have reached the DOWNLOAD/SUBMIT screen at which point you can no longer go back to make changes.

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

No. However, you will be able to download a PDF of your agency's response on the DOWNLOAD/SUBMIT screen located directly after the REVIEW page. Select the blue "Download PDF" hyperlink at the top of the summary page or right click anywhere on the screen and select Print to print a copy of your agency's response. If you need to request a copy of your response, please email rmselfassessment@nara.gov.

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