



TMS  
2.0

VA

# Admin Job Aid

Create a Draft Follow-up Survey

## Admin Job Aid: Create a Draft Follow-up Survey

(Revision date: September 12, 2020)

### Purpose

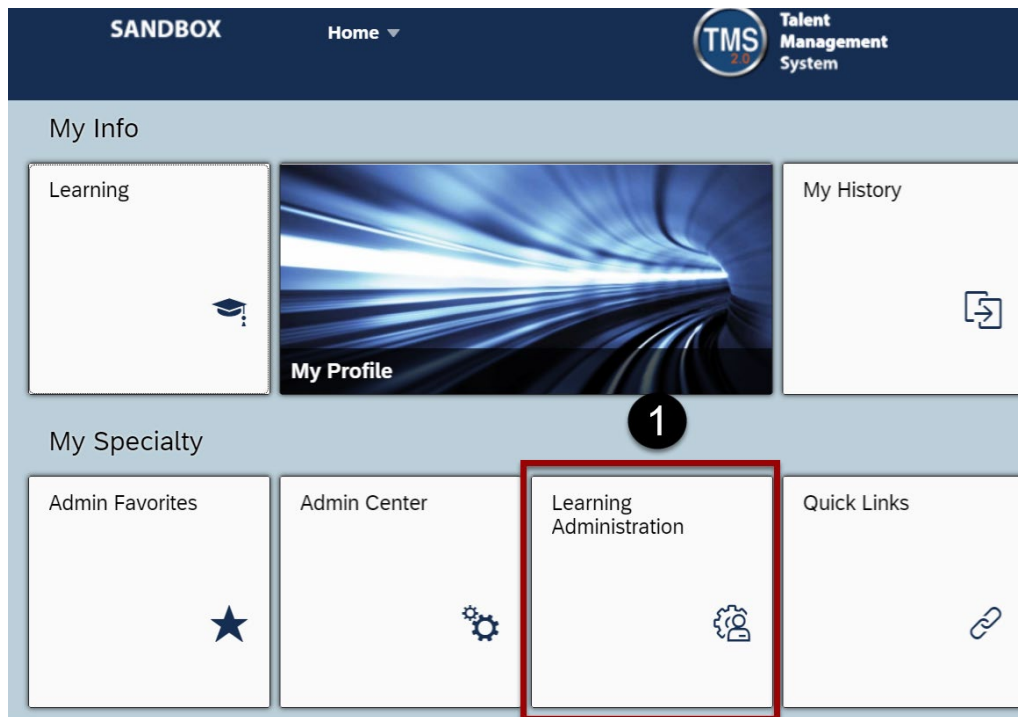
The purpose of this job aid is to guide you through the step-by-step process of creating a follow-up survey. The goal of a Follow-up Survey is to gauge the behavioral change in those who have taken a course. It is typically assigned 3-6 months after the completion of a course.

In this job aid, you will learn how to:

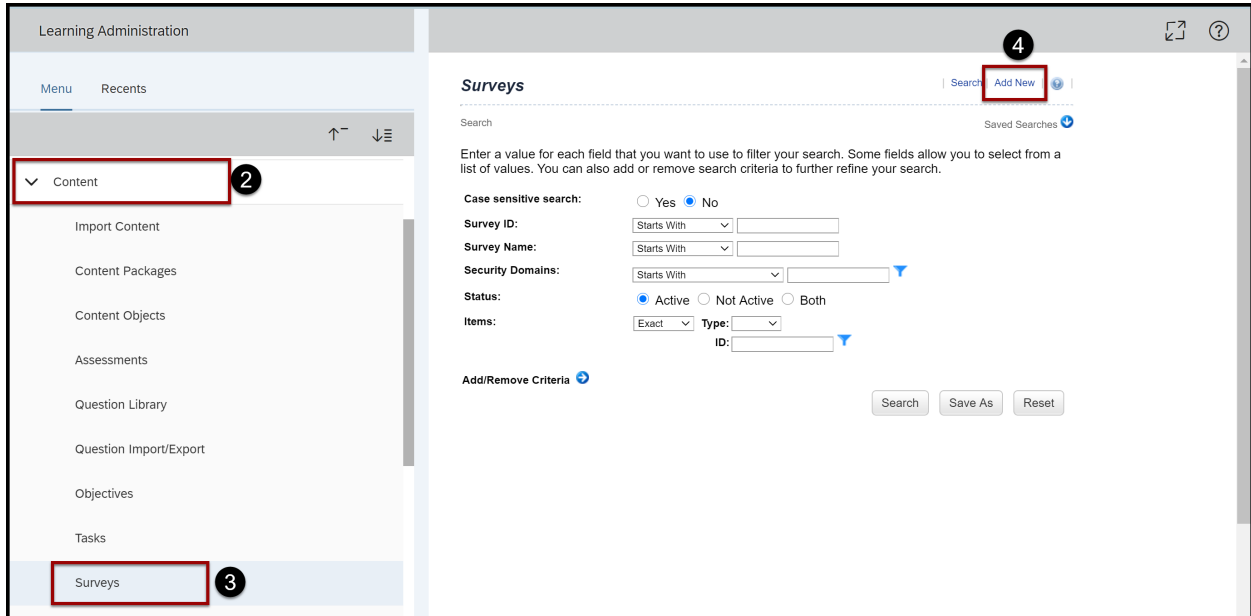
- Task A. Create a Draft Follow-up Survey

 **Task A. Access Learning Administration**

1. Select the **Learning Administration** link.

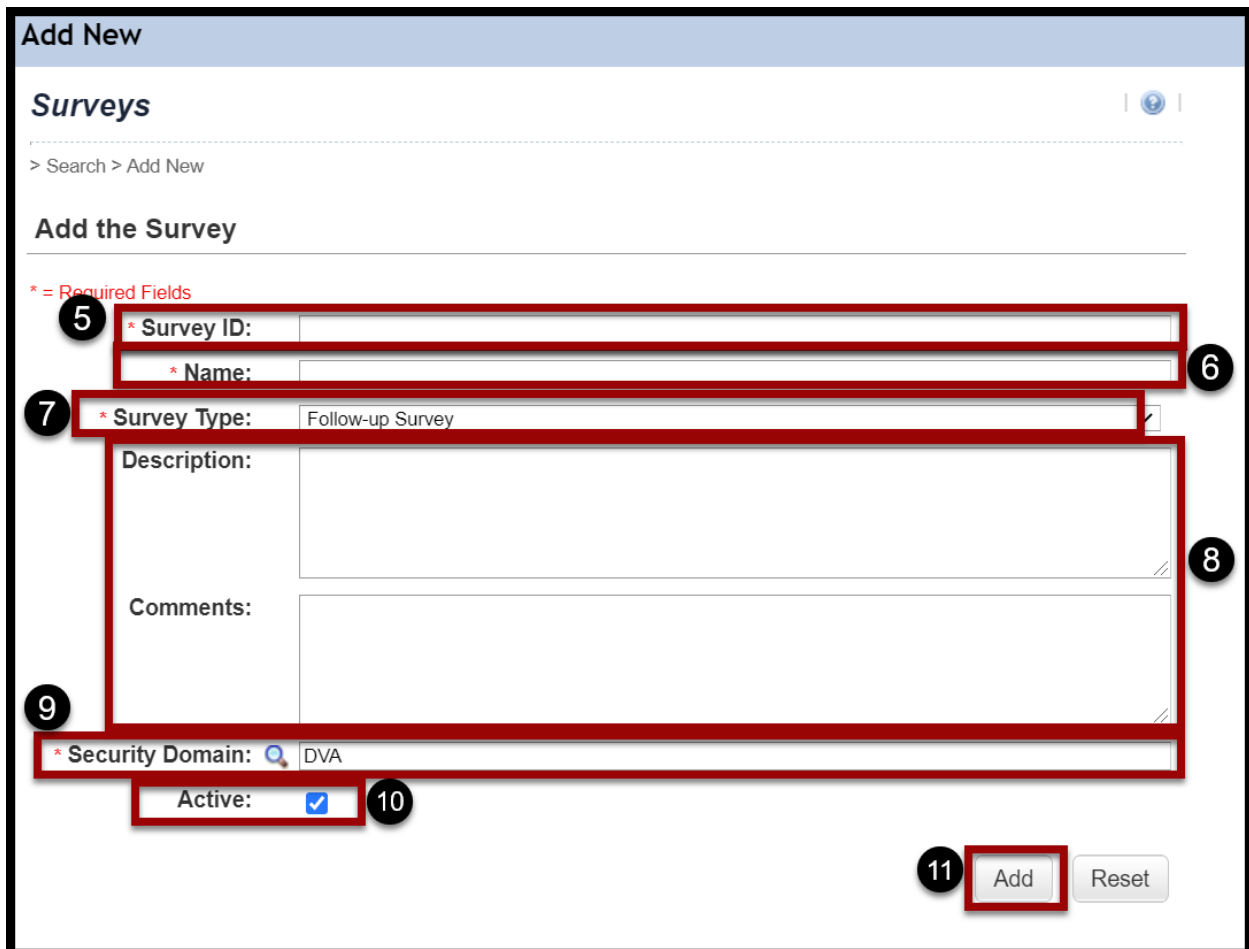


2. Select the **Content** menu.
3. Select **Surveys**.
4. Select the **Add New** link.



The screenshot displays the Learning Administration interface. On the left, a navigation menu is shown with 'Content' selected (indicated by a red box and a '2'). Below 'Content', 'Surveys' is also highlighted (indicated by a red box and a '3'). The main content area is titled 'Surveys' and features a search bar with an 'Add New' link highlighted by a red box and a '4'. Below the search bar, there are several search criteria fields: 'Case sensitive search' (radio buttons for Yes/No), 'Survey ID' (Starts With dropdown), 'Survey Name' (Starts With dropdown), 'Security Domains' (Starts With dropdown), 'Status' (radio buttons for Active/Not Active/Both), and 'Items' (Exact dropdown, Type dropdown, ID field). At the bottom of the search section are 'Search', 'Save As', and 'Reset' buttons.

5. Enter a **Survey ID**.
6. Enter a survey **Name**.
7. Select **Follow-up Survey** from the **Survey Type** drop-down menu.
8. (Optional) Enter information in the **Description** and **Comments** fields. These fields are helpful for future searches conducted by you and others.
9. Enter a **Security Domain**. Select the **Search** icon to search for and select a security domain if you do not know the security domain.
10. Select the **Active** checkbox.
11. Select **Add**.

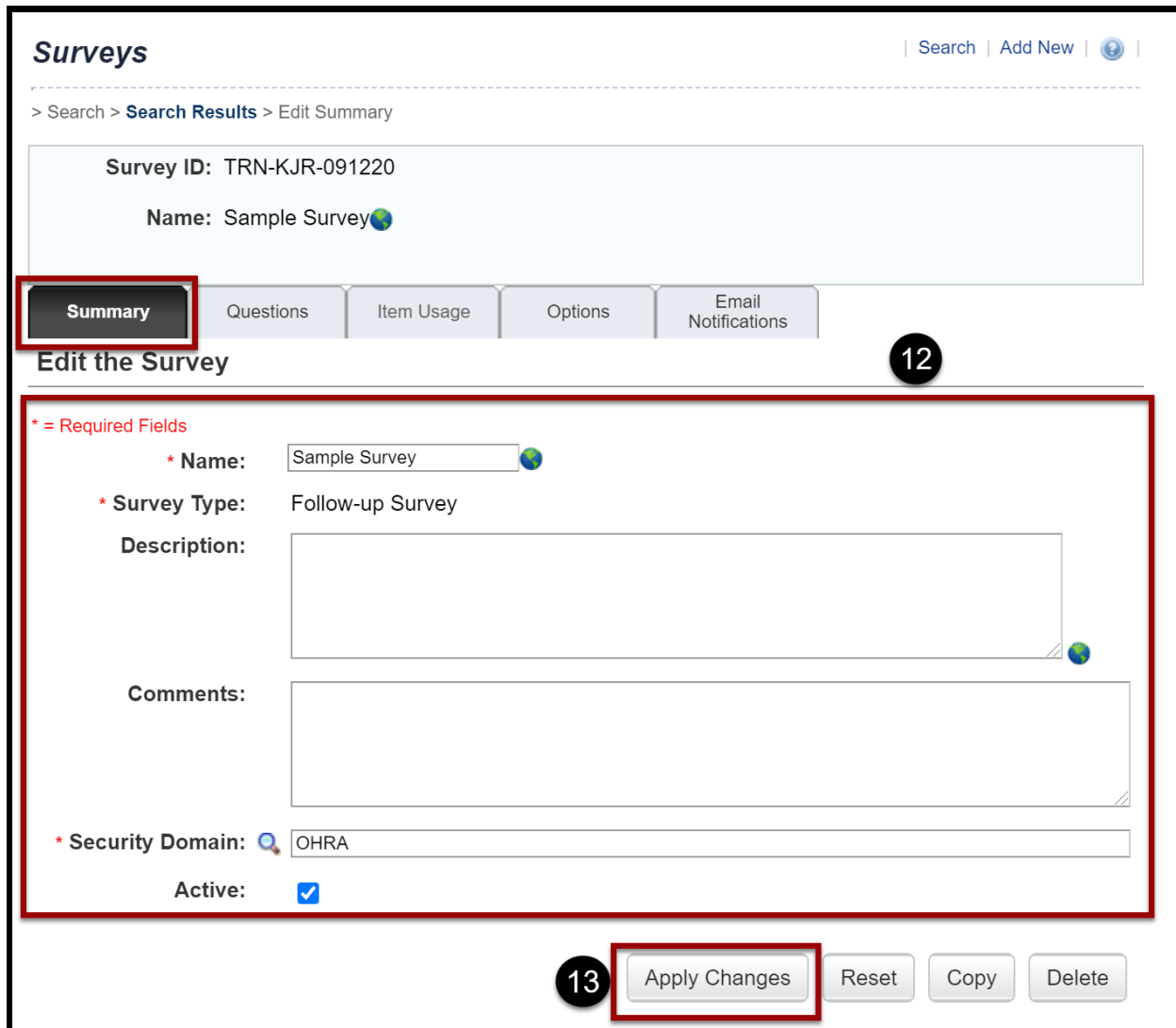



The screenshot shows the 'Add New Surveys' form with the following elements highlighted by numbered callouts:

- 5**: Survey ID field
- 6**: Name field
- 7**: Survey Type dropdown menu (set to 'Follow-up Survey')
- 8**: Description and Comments text areas
- 9**: Security Domain field (containing 'DVA')
- 10**: Active checkbox (checked)
- 11**: Add button

\* = Required Fields


- The TMS will open the **Follow-Up Evaluation** profile. If you would like to make any changes, make sure the **Summary** tab is selected and make any changes you desire.
- Select **Apply Changes**. You have successfully created a draft Follow-Up Evaluation Survey.



**Surveys** | Search | Add New | 

> Search > Search Results > Edit Summary


Survey ID: TRN-KJR-091220

Name: Sample Survey 

**Summary** | Questions | Item Usage | Options | Email Notifications

**Edit the Survey** 12


\* = Required Fields

\* Name:  

\* Survey Type: Follow-up Survey

Description:

Comments:

\* Security Domain: 

Active:

13 Apply Changes Reset Copy Delete