

# Accessing the National Workforce Benchmarking Survey

## Table of Contents

Before You Begin.....	1
Icons.....	1
Definitions .....	1
Getting Started.....	2
Changing Your Temporary Password .....	2
Adding Other Users or Administrators.....	3
Disabling or Removing Users.....	4
Signing Out .....	4
Taking the Survey.....	5
Accessing the Survey .....	5
Printing a Preview.....	5
Filling Out the Survey .....	5
Atypical Fields or Areas Worth Noting in the Survey .....	8
Saving/Submitting/Cancelling a Survey.....	8

## Before You Begin

### Icons

There are icons used throughout the site to help make taking the survey and other actions easier to understand.



The information icon is used throughout the site to indicate additional, important information is provided to help you best respond to the question.



The required icon lets you know that this field is required and needs to be filled in before the survey is “complete.”



The edit button lets you know that you can click on something to edit it.



The trash icon lets you know that you can delete something.

### Definitions

#### Organization Administrator

Administrators can submit data into surveys and access reports, but they also can determine who else at their organization can access the data by adding or disabling users.

#### Organization User

Users can submit data into surveys and access reports.

## Getting Started

To log in to the site for the first time, you will go to our new reporting and survey site, which can be accessed [here](#). **The system is not compatible with Internet Explorer, so please use another browser when logging in and accessing the survey.**

At the top right you will see, “SIGN IN.” Click “SIGN IN” and enter your email address as well as the temporary password that you were assigned.

## Changing Your Temporary Password

### Organization Administrators

If you are assigned the role of Organization Administrator, to change your password, you will click on “MY USERS,” on the top right. Here you will be taken to this screen:

Last Name ^	First Name	Organization	Role
Williams	Megan	Corporation for a Skilled Workforce (Test)	Organization Administrator

In the list of users, you should see your name. To change your password, click on the blue edit button on the right, next to your name. You will then be taken to this screen:

First Name: Megan

Last Name: Williams

Organization: Corporation for a Skilled Workforce (Test)

Email: mwilliams@skilledwork.org

Reset Password: .....

Confirm New Password: .....

User Role: Organization Administrator

Disable User:  No  Yes

Save Cancel

To change your password, you can enter a new password in the “Reset Password” box and then re-enter it in the “Confirm New Password” box. By clicking the information icon to the right, you can see what the password requirements are. Once you have entered and confirmed your new password, click “Save” to make the change. You can only save once the save button has changed to the color blue, which indicates all of the necessary fields have been filled out correctly.

Your password change is now complete, and you will sign in with your new password going forward.

### Organization Staff


If you are assigned the role, Organization Staff, to change your password, you will click on “MY PROFILE,” on the top right. Here you will be taken to this screen:

First Name

Last Name

Organization

Email

Reset Password  

Confirm New Password

User Role

To change your password, you can enter a new password in the “Reset Password” box and then re-enter it in the “Confirm New Password” box. By clicking the information icon to the right, you can see what the password requirements are. Once you have entered and confirmed your new password, click “Save” to make the change.

Your password change is now complete, and you will sign in with your new password going forward.



### Adding Other Users or Administrators

If you are the administrator for your organization, then you can give other staff at your organization user logins so that they can access the reports. *Please note that any user from a given organization can see all the reports for that organization.* For example, if there are two separate programs at an organization that have submitted data, then users from either program can see the other program’s data and reports. Security is set at the organizational level, not the program level.

To add a user at your organization, click “MY USERS” on the top righthand side of the screen again, which will take you back to this screen:

CSW WBN OVERVIEW REPORTS MY SURVEYS **MY USERS** MY ORGANIZATION SIGN OUT

Filter... X Filter... X Filter... X Filter... X

Last Name ^	First Name	Organization	Role		
Williams	Megan	Corporation for a Skilled Workforce (Test)	Organization Administrator		


To add a new user, click “New User” on the top left-hand side of the page. You will then be taken to this screen:


First Name  \*

Last Name  \*

Organization

Email  \*

Password  

Confirm Password  \* 

User Role  \*

Disable User  No  Yes

Please fill out all the required information (the fields with an asterisk). The asterisk will disappear once the information is entered.

*You will need to assign new users a temporary password, so please make sure you remember and give it to the new user.*

Please note that when filling out the information, you will be asked to select a User Role. As a reminder, Users can submit data and access reports. Administrators can submit data and access reports, but they also can determine who else at their organization can access the data by adding or disabling users.

Once you have filled everything out, then you can select “Save” at the bottom, to complete the process. As a reminder, when all of the information is filled out correctly, the Save button will turn blue.

## Disabling or Removing Users

Administrators can disable or remove users at their organization. This is helpful if staff leave or are no longer affiliated with the organization, and you no longer want them accessing the data.

### Disabling Users

If you think you might want to give a user access again, then you can disable them, which will keep their information in the system, it will just no longer be active.

To do this, click on “MY USERS” at the top of the screen. Once there, you will select the user you are disabling by clicking the blue edit button to the right of their name. You will then be taken to their profile:

The screenshot shows a user profile form with the following fields and controls:

- First Name: Text input field with an asterisk (\*) on the right.
- Last Name: Text input field with an asterisk (\*) on the right.
- Organization: Dropdown menu with "Corporation for a Skilled Workforce (Test)" selected.
- Email: Text input field with an asterisk (\*) on the right.
- Password: Text input field with an asterisk (\*) and an information icon (i) on the right.
- Confirm Password: Text input field with an asterisk (\*) and an information icon (i) on the right.
- User Role: Dropdown menu with "Please Make a Selection" and an asterisk (\*) on the right.
- Disable User: Radio buttons for "No" (selected) and "Yes". A blue arrow points to the "Yes" radio button.
- Save: Grey button.
- Cancel: Red button.

You can disable this user by selecting “Yes” after Disable User at the bottom of the page. Once done, select “Save” to complete the change.

### Deleting Users

To do this, click on “MY USERS” at the top of the screen. Once there, you will select the user you are deleting by clicking the red trash button to the right of their name. After selecting delete, you will be prompted to respond that you are sure you want to delete this user.

This option is best only if you are certain that you want to delete this user. Deleted users are not recoverable. However, you can re-add them at a later time if necessary.

## Signing Out

To sign out of the system, you can select SIGN OUT on the top right side of the screen next to the other tabs.

## Taking the Survey



### Accessing the Survey

#### Creating a New Survey

To take a new survey, you go to the “MY SURVEYS” tab on the top right. Once there, you can click “Create Survey” on the top left to start a new survey.

#### Accessing an Existing Survey



If you have a survey already started that you would like to access or edit, then go back to the “MY SURVEYS” tab. Once there, you will see a list of existing surveys:

Survey Title	Status	Program Name	Program Start	Program End	Created On ^	Last Modified On	Last Modified By		
Survey 2019 (A)	draft				7/22/2019 (9:56 AM)	7/22/2019 (9:56 AM)	Megan Williams		

Next to the survey you want to take, you can click the blue edit button to open the survey and continue completing it, or you can select the red trash button to delete.

### Printing a Preview



If you would like to print a preview of the survey or save it as a PDF, then you can click the blue “Preview Survey” button on the top left of the “MY SURVEYS” tab.


Survey Title	Status	Program Name	Program Start	Program End	Created On ^	Last Modified On	Last Modified By		
Survey 2019 (A)	draft	Test Program	01/01/2017	12/31/2017	07/22/2019 (9:56 AM)	07/24/2019 (3:03 PM)	Megan Williams		

Some like to have a hard copy to work with to collect information in advance of taking the survey rather than collecting information as they go through the online version. Clicking the preview will generate a blank version of the survey.

A word of caution: the survey is over 50 pages to print and the PDF size is quite large (over 30 KB). If you would like to print or save in sections, when you go to print, you can select the appropriate pages to make the file/print size more manageable.

### Filling Out the Survey

When filling out the survey, you will notice that required fields have an asterisk in a pink box  next to them. Once you have filled out a required field correctly, the box will turn white and the asterisk will shrink in size .

In some fields through the survey, there is an  info icon that you can select to see more information. We strongly suggest you click each info button because they contain helpful information about how to best respond to the question and what answers are and are not appropriate, including definitions. If you still need more information, please email [benchmarking@skilledwork.org](mailto:benchmarking@skilledwork.org). Once you are done reading the additional information, you can select the info button again for the window to close.

### Screen Size

The screen size is set for a monitor. However, if you are taking the survey on a laptop, you might want to zoom out to allow more of the survey on the page. To do this, go to the zoom function in your browser’s tools and adjust the zoom downwards to allow more on the page.

## Errors

The survey is set up to help you fill out it out correctly and to prevent possible errors. There are two kinds of errors that the survey is set up to flag (in most cases). These include field errors and business rule errors. While the survey does have some built in validation, there are areas where no validation is possible and so it still requires participants to be thorough in double checking their responses.

Field errors result from entering incorrect information into a field, e.g., if you put more than 100% in a field asking for a percentage. When a field error emerges, a red box will appear under the field indicating what the error is.

34. Percent Receiving Childcare Services

\* 120

This value cannot be more than 100%

Along with the red box appearing, on the left-hand side in the “Survey Completion Status” box, you will see a 1 appear after “Field Errors” (if it is your first error).

**SURVEY COMPLETION STATUS**

✗ Required: 35 / 114      Optional: 0 / 31

Field Errors: 1      ✓ Business Rule Errors: 0

View

You can use the arrows below the Field Error status to easily move through and correct any field errors. The single arrows will move you back or forward one error and the double arrows will take you to the first or last error on the survey.

In addition to field errors, there are business rule errors. There are rules set up throughout the survey to ensure that the right data is being entered. In the example below, the different values for employment status for enrollees summed up to be greater than total enrollments. Because of this, the Business Rule section of the Survey Completion Status box gained a red “X”, there is now a number 1 after Business Rule Errors, and the “View” button is now able to be selected. When you select the “View” button, it will provide details on the error(s) that needs addressing. If you click the error, it will then take you to that error on the survey so that you can address it.

**SURVEY COMPLETION STATUS**

✗ Required: 187 / 223      Optional: 24 / 59

Field Errors: 0      ✗ Business Rule Errors: 1

View

*You cannot change the status of your survey to “Final” until all the field and business errors are addressed. However, you can continue to move through the survey and address them at a time that is convenient for you.*

## Displaying Inactive Fields

Based on your responses, some parts of the survey will not be required for you to complete. If you would like a more condensed view of the survey, then you can select “Hide” after “Inactive Fields Display” on the top left of your screen.

Save    Cancel    Print


Survey Submission Status: Draft    Final


Inactive Fields Display: Show    Hide

Whichever option you choose will be highlighted in blue.

In some cases, you may want to see the inactive fields—for example, to make sure you answered the survey correctly and these fields do not apply or to see what other questions are being asked of different providers. To see them, select “Show.”

### Example of Inactive Fields Hidden

69. Adult Basic Education and/or Literacy Services Offered  
\*  No  Yes 

72. English as a Second Language Services Offered  
\*  No  Yes 

### Example of Inactive Fields Showing

69. Adult Basic Education and/or Literacy Services Offered * <input type="radio"/> No <input type="radio"/> Yes 	70. Percent Receiving Adult Basic Education and/or Literacy Services <input data-bbox="558 606 1008 648" type="text" value="%"/>	71. Who provided Adult Basic Education and/or Literacy Services? <input data-bbox="1045 606 1495 648" type="text" value="Please make a selection"/>
72. English as a Second Language Services Offered * <input type="radio"/> No <input type="radio"/> Yes 	73. Percent Receiving English as a Second Language <input data-bbox="558 728 1008 770" type="text" value="%"/>	74. Who provided English as a Second Language? <input data-bbox="1045 728 1495 770" type="text" value="Please make a selection"/>

### Navigating the Survey



The survey is divided into sections. To easily jump between sections, you can click the section header on the left-hand side and it will take you to that part of the survey. You need to select the title of the section to advance. Clicking anywhere in the box will not cause the survey to advance.



### Required Fields/Field Completion Status

You will notice on the left-hand side of the survey, where the section headers are, that you can see how many fields you have or have not answered within the section and overall.

In each section box, on the right-hand side of “Required” is a number out of another number listed (below: 22/22 in GENERAL INFORMATION AND ORGANIZATIONAL PROFILE). This tells you how many of the required fields you have responded to. This number will change as you take the survey and indicate which services you do and do not offer and which data you do and do not collect. The same is true for Optional fields as well. Optional fields allow you to provide more information but are not required.

<p><b>1. GENERAL INFORMATION AND ORGANIZATIONAL PROFILE</b></p> <p>✓ Required: 22 / 22      Optional: 0 / 2</p> <p>« &lt; &gt; »      « &lt; &gt; »</p>
<p><b>2. PROGRAM PARTICIPANT SERVICES</b></p> <p>✗ Required: 117 / 120      Optional: 7 / 7</p> <p>« &lt; &gt; »      « &lt; &gt; »</p>

If you have filled out all the required information for a section, there will be the green check  mark shown above in “GENERAL INFORMATION AND ORGANIZATIONAL PROFILE.” If you have not filled out all the required fields, there will be a red X  as shown in “PROGRAM PARTICIPANT SERVICES.”

To better understand how much of the survey you have completed overall, you can look at the top light blue box, SURVEY COMPLETION STATUS, to see how many of the required fields overall you have responded to. The  and  mean the same for this box as well.



## Atypical Fields or Areas Worth Noting in the Survey

### Entering a Date

In two places, the survey asks you to fill out a date. These questions are both in the Program Information section. To enter the date, you click on the part of the date you want to edit and then you use the arrows on the right to move up or down, pulling in the right number. Or, you can type in the date.



### Missing Unknowns in the Disaggregated Outcome Data Collection

In the Enrollment and Participant Characteristics section of the survey, we ask you to include characteristics of your cohort by providing the information you know about participants as well as when the information is “unknown” for participants.

To make disaggregation easier in the outcomes section, we do not ask you to provide placement or wage data, etc. for those in your cohort where you do not know their gender, race, or ethnicity. However, the business rules for those sections are tied to the numbers entered in the Enrollment Characteristics section. *Therefore, if there are members of your cohort for whom you do not know their demographics, the tally will not add up correctly in the outcomes section.* For example, if your cohort includes 450 participants, but you do not know the race of 50 participants, then in the outcomes section, it will ask you to provide data out of 450. However, you will only know how to respond for 400 participants in your cohort, so it will show 400/450. There is no error and you can move on, but it will require you to do more of this validation on your own to ensure the numbers are correct.

### Wage Submission Fields

You will be asked to provide aggregated median wage information for your cohort. These fields are set up to allow you to enter decimals. *However, if you quickly type four numbers, it will NOT add the decimal for you.*

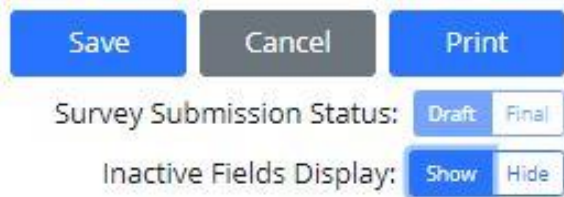
## Saving/Submitting/Canceling a Survey

### Saving the Survey

You can save and return to the survey as often as you would like. When saving a survey, go to the tab on the top left that says “Save” and click. **IMPORTANT: You have to save the survey in order to retain information that you have entered. The survey does not automatically save your work.**

Your survey will always be in Draft form until you have completed all the required fields and addressed any errors. You will not be able to switch the survey status to Final until this is done. The option to do so will be faded out and not selectable.





### Changing the Survey Submission Status to Final/Submitting

When you have completed all required fields and addressed any form errors, then you can switch the Survey Submission Status to “Final” on the top left. You will not be able to switch the toggle to Final until all the necessary fields are filled in and any errors have been addressed. You will see that you are able to do so because the fields are now selectable (appear in darker blue) and a message appears that states the following.

#### Survey ready to be submitted as FINAL



**Once you select Final, you must hit Save to submit the survey as your final version.** Once you select save, the survey will be in final status and your data will now be in the dataset supporting the reports and you can access reports for this survey.

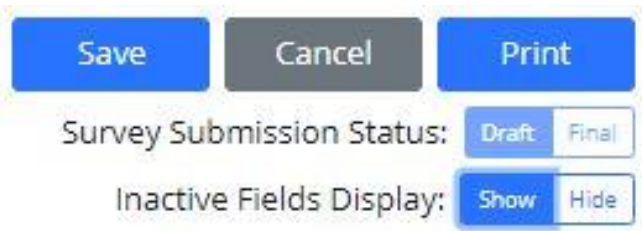
### Changing the Status Back to Draft

At any time after you have submitted your final survey, you can pull it back into draft form. You may want to do this if you realize an answer was filled in incorrectly or if you have more complete retention data for the cohort, and you would like to include it so that your reports reflect the right outcome data.

To change your survey status back to a draft, reopen your survey by selecting the blue edit button next to the appropriate survey in “MY SURVEYS.” Once there, switch the toggle back to Draft and select Save. Please remember that once you make any necessary edits, you will need to resave the survey as “final.”

### Canceling Your Survey

If you have started a survey in error or need to cancel, you can select “Cancel” on the top left-hand side of the survey page.



If you cancel a survey that has already been saved, then it will not delete the survey but instead, not save anything since the last time you saved the survey. You will be prompted to reply that yes you are certain you want to cancel.



### Deleting Your Survey

You can delete a survey that is no longer needed on the “MY SURVEYS” tab by clicking the red trash button next to the survey you want to delete. A prompt will ask you if you are sure you want to delete the survey. Deleted surveys are not recoverable so make sure that you are certain you want to delete before doing so. You can always start another survey while keeping other past versions in place.

### Printing Your Survey

If you would like a version of the survey for your records, then you can select the Print button on the top left-hand side of the survey to print a version or save it as a PDF.

**Thank you again for taking the time to participate in the survey! We greatly appreciate your time and effort and for contributing such important information to the field!**