## Questionnaire Management Guidelines

Goals:

- One consolidated document to track all model and CQ changes throughout the life of the project
- Questionnaire always matches the live survey
- Easy and error-free way to submit CQ changes
- All changes tracked and reflected in one document (DOT will help)

Basic rules:
1 This questionnaire has to match the live survey
2 All changes to the live measure need to be tracked and archived in one document
3 All CQ change requests have to be submitted using this document
SRA: 1) marks up changes and submits the entire document to DOT
DOT: 1) archives change request on separate tab
2) implements change(s)
3) updates the document to reflect all implemented changes in the "clean" questionnaire - SRA can send to the client and use for future CQ changes

4 DOT safeguards correct formats - your next CQ changes have to be submitted using one survey document with appropriate color-coding

## Questionnaire Skip Set Up Guidelines

Goals:

- Ensure all skip setup included in the questionnaire is consistent with skip logic rules
- Decrease down time due to skip corrections within submitted surveys

Basic Skip Rules:

## "Other Please Specify" (OPS) Skip Rules:

Type 1 "Other Please Specify" Rules (Text box to the right of the answer choice "Other, please specify:"):
1 OPS questions must be set up as a radio-button or checkbox to have the text box appear next to the answer choice "Other, please specify:"
2 The open ended text box for "Other Please Specify" has it's own question ID and needs full question text included in questionnaire
(This will be used by clients, SRAs, etc, in the portal and comment cluster to differentiate between OPS questions within a measure)
3 The open ended text box has a character limit of 100. No exceptions! if more characters are needed, please request a Type 5 group.
4 In the special instructions column, indicate that this is a "OPS Group" for the PARENT and CHILD questions.

Type 5 "Other Please Specify" Rules (More than two questions within question group):
1 Open-ended boxes will not show up next to the answer choice "Other" in this type of skip logic. They will pop as separate questions that require additional question text. Please include full question text.
2
Radio-button, checkbox or drop-down CQs can have an "other please specify" in this type of skip set up but the text box will pop as a separate question.
3 In the special instructions column, indicate that this is a "Skip Logic Group" for the PARENT and CHILD questions.

Please refer to the Current Custom Qsts tab for examples (OPS Type 1 and OPS Type 5 are marked in the comment boxes)

## General Skip Rules:

1 The parent question must come first, and child questions must immediately follow. Skip logic groups cannot be broken up by other questions that are not included within the skip.
2 A CQ can only have one parent question; a single question CANNOT be triggered by different questions.
3 Answers within one question can be set up so that different answer combinations trigger different questions, through the use of "answer groups".
4 A question can only be a part of ONE group type i.e. skip logic, matrix, or multiple lists
5 Horizontal scale questions CANNOT be parent CQs, but they can be child CQs. NOTE: By changing a horizontal scale question to a dropdown they can become parent questions.
6 Open End text questions cannot be a parent questions, but they can be child CQs.
7 Multi-select questions can be used in skip logic.

As a general tip for SRAs: The more complex the skip logic, the more difficult it is to keep the tabs and labels concise in SPRs. It is important to know when to just use filters versus creating skip logic.

Caution: Measures without enhanced/segmented reports might require intricate skip to gather necessary data for standard reports.










| \#REF! <br> \#REF! <br> \#REF! |  |  | red \& strike through: DELETE <br> underlined \& italicized: RE-ORDER <br> pink: ADDITION <br> blue + -->: REWORDING |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| \#REF! |  |  |  |  |  |  |
| QID | Skip Logic Label | Question Text | Answer Choices (limited to 50 characters) | Skip to | Type (select from list) | Single or Multi |
| CQ0004444 |  | How frequently do you visit this site? | Daily |  | Dropdown (Select-one) | Single |
|  |  |  | Two to three times per week |  |  |  |
|  |  |  | About once a month |  |  |  |
|  |  |  | Every few months |  |  |  |
|  |  |  | Every 6 months or less often |  |  |  |
|  |  |  | This is my first time visiting this site |  |  |  |
| CQ0004445 |  | Are you a registered user on this site? | 1 am registered | A | Radio button, one-up vertical | Single |
|  |  |  | 1 am not registered, and do not intend to |  |  |  |
|  |  |  | tam not registered, but intend to register during my visit today |  |  |  |
| CQ0004446 | A | Please explain why you do not intend to register? |  |  | Text area, no char limit | Single |
| CQ0004447 |  | What best describes your primary reason for visiting the site today? | Researching products for possible inclusion in a design | $\begin{aligned} & \mathrm{B} \\ & \mathrm{C} \\ & \mathrm{~A} \\ & \hline \end{aligned}$ | Radio button, one-up vertical | Single |
|  |  |  | Gathering information on a product or manufacturer specified in a design |  |  |  |
|  |  |  | Other (please specify) |  |  |  |
| CQ0004448 | A | Other primary reason |  |  | Text area, no char limit | Single |
| CQ0004449 | B | What type of information were you looking for when researching products for the possible inclusion in a design? | Spec |  | Checkbox, one-up vertical | Multi |
|  |  |  | 3D models |  |  |  |
|  |  |  | Product application |  |  |  |
|  |  |  | Green information |  |  |  |
|  |  |  | Cost |  |  |  |
|  |  |  | Other |  |  |  |
| CQ0004450 | C | What type of information were you looking for when researching products for the possible inclusion in a design? | CAD |  | Checkbox, one-up vertical | Multi |
|  |  |  | Spec |  |  |  |
|  |  |  | 3D models |  |  |  |
|  |  |  | Green information |  |  |  |
|  |  |  | Product application |  |  |  |
|  |  |  | Manufacturer's contacts |  |  |  |
|  |  |  | Cost |  |  |  |

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| Required <br> YIN | Special <br> Instructions |
| :---: | :--- |
| Y |  |
| Y | Randomize |
| N | OPS Group |
| Y | Skip Logic Group |
| N | Skip Logic Group |
| Y | Skip Logic Group |
| Y |  |
|  | Skip Logic Group |
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| $\begin{aligned} & \text { Required } \\ & \text { Y/N } \end{aligned}$ | Special Instructions |
| :---: | :---: |
| Y | OPS Group |
| N | OPS Group |
| Y | Skip Logic Group |
| Y | Skip Logic Group |
| Y | Skip Logic Group |
| N | Skip Logic Group |
| Y | Skip Logic Group |
| Y | Skip Logic Group |
| N | Skip Logic Group |
| Y |  |

