



Divisions of Family Practice

A GPSC initiative

Web Manual: Checkbox Surveys

March 2014

Table of Contents

Getting Started.....	3
Survey Checklist.....	4
Group & User Management.....	6
Question Libraries	Error! Bookmark not defined.
Styles & Templates.....	8
Folder & Survey Permissions.....	9
Launch the Survey.....	11
Sending Your Survey	12
Sending Out A Survey Through Email.....	12
Sending Out A Survey Through Checkbox	12
How to Print Paper Copies of the Survey for Distribution.....	13
Sending Reminders	14
Results & Reporting	16
How To Manage Incomplete Responses	16
How To Create And Format Reports	16
How To Share Or Download A report.....	16
How To Export Response Data To A Spreadsheet.....	17
How To Include Data From Paper Responses	17
Appendix A: Sample Report	19

Getting Started

What is Checkbox Surveys?

Checkbox Surveys is a survey and data collection tool. In addition to full-length surveys, the tool can be helpful for smaller polls including date polling for meetings. The data collected is hosted by the Divisions provincial office on servers located in Canada.

Account Set-Up

Division accounts are managed by the Divisions of Family Practice provincial office. To have an account set up, please contact [Robin Hussen](#). Once the Division account has been set up, Division administrators are able to set up additional administrators and users in Checkbox. For instructions, please refer to the Group and User Management section of this manual.

Logging In

Once an account is set up and administrators have been sent their username and password, they can log in at <https://surveys.divisionsbc.ca>.

Learning Tools & Support

Checkbox offers extensive support documentation and video found on their site: <http://www.checkbox.com/support/overview>

Some resources which are particularly helpful for getting started include:

- [Checkbox 6 Quick-Start Guide](#)
- [Checkbox 6 Question Items Guide](#)
- [Checkbox 6 Report Wizard Guide](#)
- [Checkbox 6 User Import Guide](#)

Survey Checklist

This is not a comprehensive list, but is meant to touch on some important pieces to consider.

Before launching

- If you do not already have a Checkbox account set up for the Division, contact [Robin Hussen](#) at the Provincial Office to have one set up.
- If needed, go through Checkbox training session provided by the Provincial Office.
- If you will be sending survey invitations through Checkbox, confirm which email the survey will be sent from. This must be an @divisionsbc.ca email address. If you do not have one, please speak to [Robin Hussen](#) at the Provincial office to set one up.
- Generate a distribution list, or lists, and if you're using Checkbox invitations, input your members into Checkbox as users with first name, last name, username, email and password. This can be done manually or by importing a spreadsheet document (this information can be exported from DivIT). Make note of any duplicate email addresses.
- Prepare content for the distribution email(s).
- Add survey information to your website to be made live upon survey launch. (optional)
- Activate the survey(s) and confirm settings, styles, and permissions.
- Create and send a test invitation in Checkbox. Fully complete the survey and all branching options as a final test to catch any errors.
- When determining a launch date for a larger survey, remember that the Checkbox Surveys support team is located on the east coast and closes early. It is better to launch in the morning so that they are available to assist if there are any technical issues to be resolved. Friday launches are also not recommended.

Launch date

- Send out the survey using Checkbox invitations, email, or other method.
- If you are using Checkbox invitations:
 - make sure to split duplicate email addresses (different respondents with the same email address) into separate invitations.
 - Check the recipient list after sending to ensure all the invitations were sent successfully.

Following the launch

- ❑ Follow up with respondents as needed. If using Checkbox invitations, send reminders through Checkbox.
- ❑ Additional people may need to be sent the survey. Add them to Checkbox as users before sending them an invitation.
- ❑ If issues arise that you need assistance with, contact the provincial office. These are some frequently asked questions that survey respondents may ask:

Why can't I proceed to the next page of the survey?

Check whether there are any required questions on the page that you haven't completed. They will be highlighted by an error message in red.

The survey kicked me out before I was done. Why did it do that?

If you hit the "enter" key when you answering a question, you will proceed to the next page of the survey, or complete the survey if you are on the final page. To proceed to the next question using the keyboard, hit the "tab" key instead of the "enter" key.

How do I get back into the survey to edit or add to my responses?

Click on the link in the original survey invitation you were sent. Or, if you clicked on "Save and Exit" the last time you were in the survey and sent an email reminder to yourself, you may click on the link in that email.

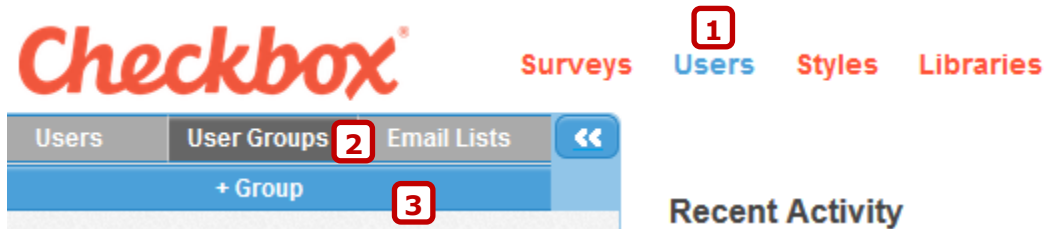
Note: in order for the respondent to go back into the survey and edit an incomplete or complete response, the permissions on the survey must allow them to do so. Confirm they have the correct permissions by going in to edit the survey, clicking on Settings, then Permissions.

Group & User Management

When you send out a survey, you may choose to send it by email or through DivIT or you may choose to send it out through Checkbox email invitations. In order to do this you must first create the users you wish to send the survey to.

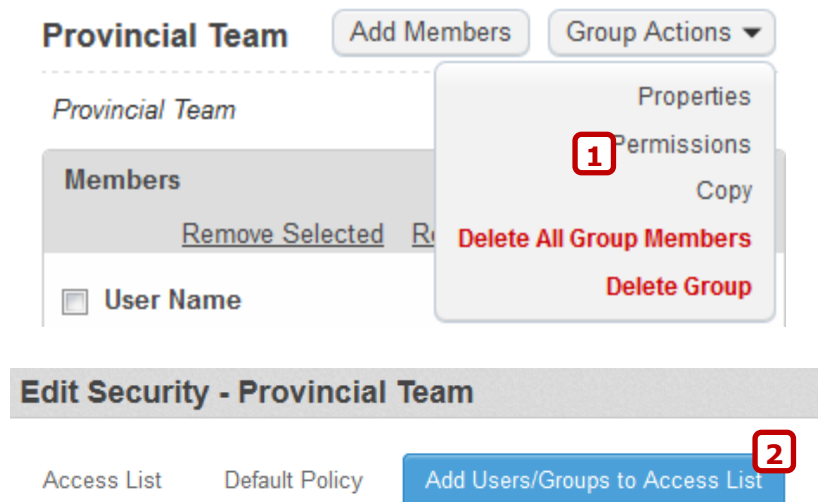
Creating New Groups

1. Sign in to Checkbox using an administrator log-in and select "Users" [1] > "User Groups" [2] > "+ Group" [3].

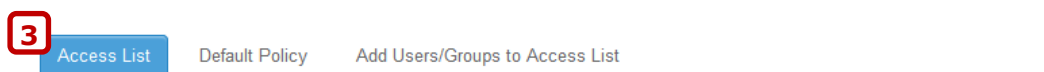


2. Follow the instructions in the window that pops up to add a group name and add members to the group.

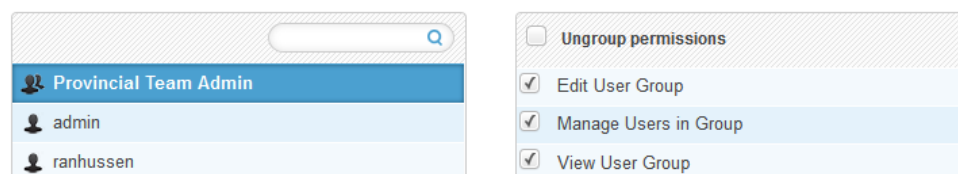
3. To give another administrator permission to view or edit the group:
 - a. Select the group.
 - b. Select "Group Actions" > "Permissions" [1].
 - c. Click on the third tab called "Add Users/Groups to Access List" [2].
 - d. Search for user(s) or group(s) you wish to add in the left-hand list and click on each one to move it to the right-hand list.



- e. Click on the "Access List" tab [3] and select a user or group. In the right-hand box, check off the permissions that user or group should have:

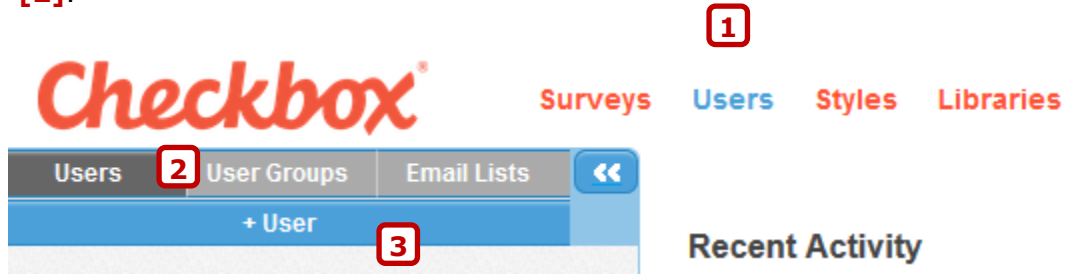


Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.



Creating new users – manual entry

1. Sign in to Checkbox using an administrator log-in and select “Users” [1] > “+ User” [2].



2. Follow the instructions in the windows that pop up:
 - a. Username: add a username, email address and password.
 - b. Profile: add the user’s first name and last name.
 - c. Roles: there are many different combinations of permissions you could use. These are two of the most common:
 - i. Select the following roles for a **survey administrator**:
 - “User Administrator”
 - “Survey Administrator”
 - “Respondent”
 - “Report Viewer”
 - “Report Administrator”
 - “Survey Editor”
 - ii. Select the following role for a **survey respondent**:
 - “Respondent”
3. Groups: Add the user to the appropriate user groups here. It is recommended that you add survey administrators to a Division admin group to give them access to all surveys associated with that group.

Creating new users – importing

For a step-by-step explanation of how to import a group of users, please refer to the Checkbox [User Import Guide](#). You may export your user information from DivIT, then upload it into Checkbox. If you have existing users and upload new information (for example, a new email address), their member records will be updated.

Note: Usernames **must** be unique. If you upload a user with the same username as an existing user, Checkbox will update the existing user instead of creating a second one.

Note: We recommend that you use the following fields when you import users: Username, Password, Email address, FirstName, and LastName.

Styles & Templates

Styles

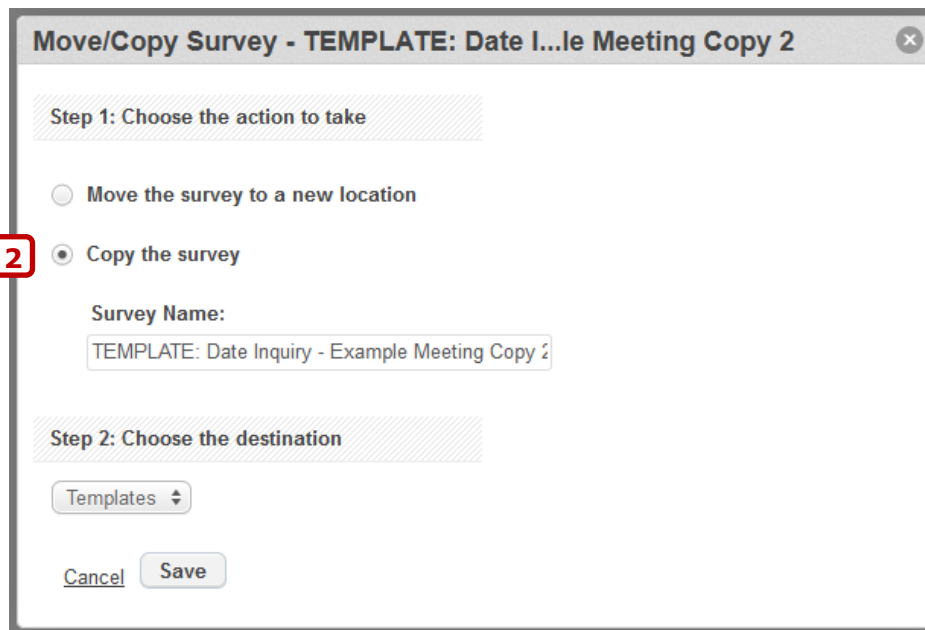
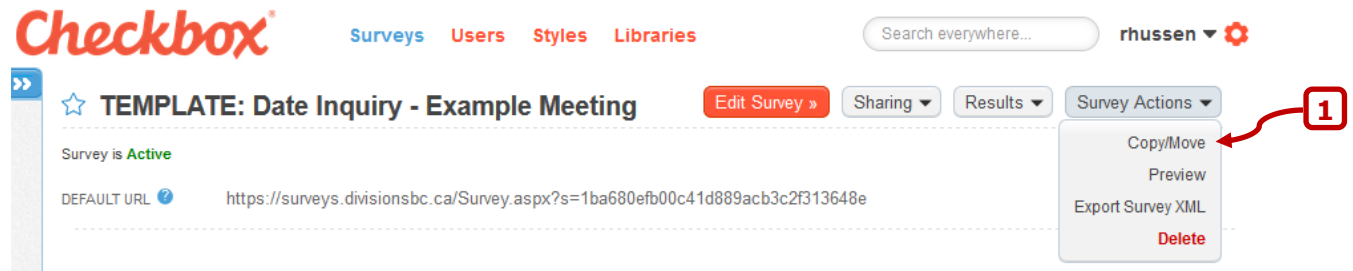
When you create a survey you are able to use a pre-existing style to brand the whole survey including header, footer, font and colours. Just select the style listed under your Division's name. You may also choose to create a new style for a survey. Click on the "Styles" link at the top of the page, then click on "+ Survey Style".

Templates

All Divisions have access to a Templates folder listed under Surveys. You may use these templates as a starting point for surveys. To use a survey template:

1. Click on the desired template survey.
2. Select Copy/Move as shown in [1].
3. Copy the survey to a different folder to work on it as shown in [2].

Note: Be sure to copy the survey template and edit the copy; do not edit the template itself.

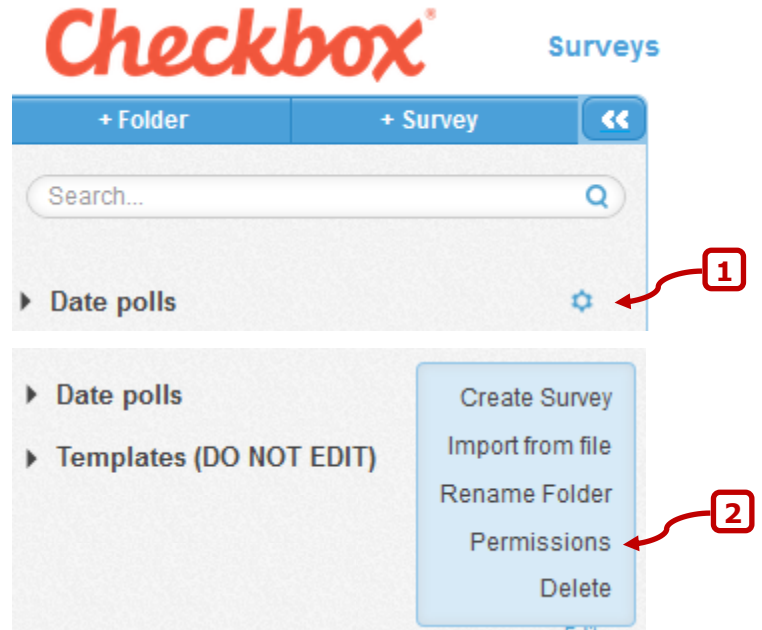


Folder & Survey Permissions

To ensure that survey information is easily accessible to all staff within a Division, it is recommended that you always add folder and survey permissions to the Division Admin User Group that the Provincial Office created when the Division account was set up. When new staff are hired, they can be added to that user group and will automatically have access to the Division's surveys. Sub-groups for specific projects can also be created.

Assign permissions to a folder

1. Select "Surveys" from the top navigation.
2. Click on the folder you wish to assign permissions to and select the symbol as shown in **1**. A drop-down menu will appear.
3. Select "Permissions" as shown in **2**.
4. The first tab in the window that pops up shows the Access List: a list of the users who currently have access to the folder. Select an individual to view / edit the permissions they have to the folder.
5. To add or remove individuals or user groups, select the final tab in the window: "Add Users/Groups to Access List". Select the individuals and / or groups you wish to add or remove.



Note: adding a user or user group will not automatically add any permissions to the folder. The permissions must be added afterwards in the Access List tab.

Assign permissions to a survey

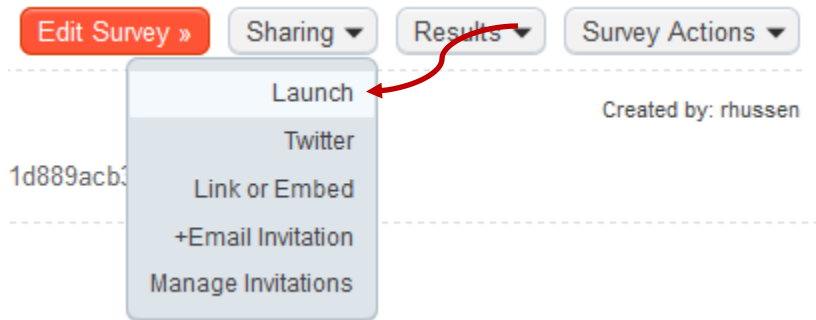
1. Select "Surveys".
2. Click on the survey you wish to assign permissions to and select: [Edit Survey »](#)
3. From the top right-hand menu, select: [Settings](#)
4. From the "Settings" window, select the "Permissions" tab and click on "Show Advanced Settings" to view the permissions for the survey.
5. The first tab in the expanded area shows the Access List: a list of the users who currently have access to the survey. Select an individual to view / edit the permissions they have to the survey.
6. To add or remove individuals or user groups, select the final tab in the "Advanced Permissions" area: "Add Users/Groups to Access List". Select the individuals and / or groups you wish to add or remove.

Note: adding a user or user group will not automatically add any permissions to the folder. The permissions must be added afterwards in the Access List tab.

Launch the Survey

When the survey is ready for distribution:

1. Select the desired survey.
2. From the "Share" drop-down menu, select "Launch".
3. This will open the launch wizard which will walk you through the steps of launching the survey.



Sending Your Survey

Surveys can be sent through Checkbox Surveys, through email or embedded in a website.

Sending Out A Survey Through Email

1. Select the desired survey.
2. From the "Share" drop-down menu, select "Launch".
3. This will open the launch wizard which will walk you through the steps of launching the survey. The last page will provide a link which can be shared with survey participants through email or a link on your website. Make sure the survey is set to "Public" under "Settings" > "Permissions".

Sending Out A Survey Through Checkbox

Confirm which email the survey will be sent from. This must be an @divisionsbc.ca email address. If you do not have one, speak with the provincial office staff to set one up.

Input your members into Checkbox. This can be done manually or by importing a spreadsheet document (this information can be exported from DivIT). Refer to the provincial office [Membership Manual](#) and the Checkbox [User Import Guide](#) for step-by-step instructions. It is ideal to set up a group and add the users who will be sent survey invitations. This way you can use the same group for the main survey and for the MOA survey.

Note: There is a limit of 500 users for each invitation. If your group is larger than that, you will need to split it into two groups.

Note: Checkbox will only send out one invitation to each email address. If you have more than one person using the same email address, the system assumes there has been an error and will only send once. To send an invitation to the second instance of a duplicate email address, create a second invitation and separate the duplicate email addresses into different invitations. Recipients with shared email addresses must be added to the system as users with unique usernames. If they are not, all invitations sent to the shared email will only provide access to a single survey.

Note: If you send an additional invitation after sending the first bulk invitation, make sure to add the recipient to the system as a user with a unique user name. If you do not, they will not appear in the user list and you would not be able to manually edit their username, password or other information should you need to provide assistance to the recipient.

When you're ready to send out the survey invitations, click on the survey, then select "Sharing" and "+Email Invitation".

Name & Options

Under "Other Options", ensure that "Allow embedded survey link to automatically log users in" is checked off.

Message

The "From Email" **must be a Divisions email address.**

Add the message you wish to send out to respondents in the body of the email. You may include images, links, simple merge fields etc. To automatically insert the name of the recipient, click in the email content where you would like to insert the name, then select FirstName and / or LastName from the dropdown at the bottom right-hand side of the email editor and click on Merge. For example:



Recipients

Select the "Users" tab if you would like to add respondents individually, or select the "Groups" tab if you have set up a group of users for the survey. Add them to the invitation. The system cannot send out invitations with more than 500 people attached to them.

Note: If your invitation is addressed to more than 500 people, you must split it into two groups.

Note: If you have recipients with the same email address, they must be split into separate invitations otherwise the system will assume the duplication was an error and remove the duplicate.

Review

Review your settings and preview the message here.

Finish

This window gives you the option to send a test email then send out the invitation to the recipient list. We strongly recommend that you send a test invitation to yourself before sending it to the full group. Then click on "Send Invitation Now" to send it out. The sending process may take some time, especially if you have a large group of recipients. Do not navigate away from the Checkbox window during the sending process or you may disrupt the sending.

After sending, check the recipient list to ensure all invitations have been sent successfully by selecting "Manage Invitations" from the "Sharing" drop-down menu, then clicking on the appropriate invitation then selecting "View All".

Tips:

- Send a test invitation to yourself before sending it to the full group.
- After sending, check the recipient list to ensure all invitations have been sent successfully.

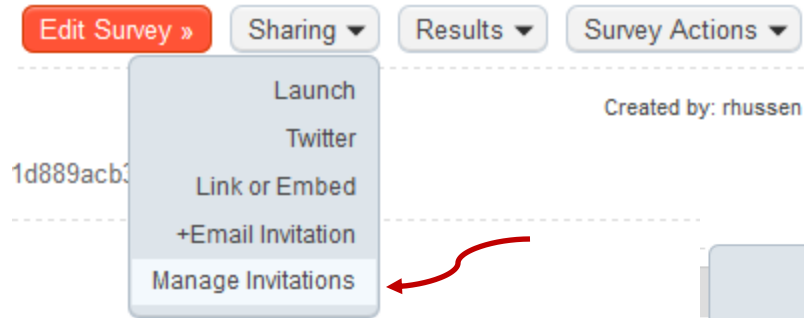
How to Print Paper Copies of the Survey for Distribution

It is recommended that electronic responses are required; however in some cases you may have an individual who requires a paper version of the survey. The best option is to print by selecting "Edit Survey" > "Survey Actions" > "Print" or to save as a PDF if you have access to a PDF writer by selecting "Print" then selecting the PDF writer instead of a printer. Select landscape instead of portrait layout to maximize font size. Other basic formatting such as whether you want the survey title, page numbers and item numbers to appear can be edited under "Edit Survey" > "Settings" > "Appearance".

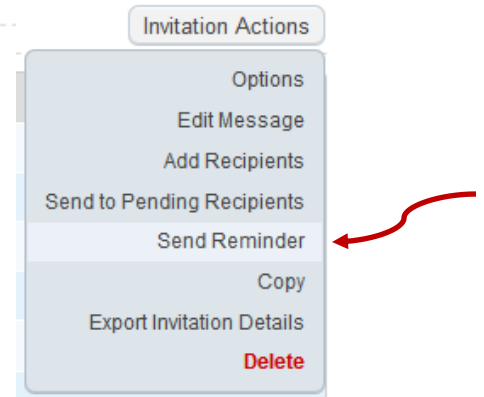
Sending Reminders

Sending a Bulk Reminder

1. Click on "Manage Invitations" under "Sharing" as shown here:



2. Click on the name of the invitation you sent. A window will pop up with details of the invitation, recipients and responses.
3. Click on "Invitation Actions" and select "Send Reminder":
4. Edit the email message and send. This will be sent to all participants who have not completed the survey.



Sending an Individual Reminder

You may run into recipients who have misplaced their survey invitations. Create a new invitation and add only the users who need the survey link re-sent.

As long as you have added users to Checkbox, then added them to the invitation(s), Checkbox is able to match up the information for individual users and apply the same rules and restrictions to them. The original invitation and reminder will provide different URLs to the user, however both will direct them to the same survey, including partially completed responses if the user saves and exits part-way through completing the survey. They will still be limited to answering the survey once if you have applied that limit to the number of responses per respondent. Their response will also be tracked in both the original invitation and the individual reminder.

If you did not add the person as user in Checkbox before sending them the invite, follow this process to generate the unique link that was initially sent out to the recipient and resend in a new invitation or in an email outside of Checkbox:

1. Click on "Manage Invitations" under "Sharing".
2. Click on "Invitation Actions" and select "Export Invitation Details". This will give you an export of each person invited and some details associated with their invitation.
3. Open the export in Excel, identify the user(s) you wish to resend to and copy the text from the "Recipient Guid" column in Excel. Paste this text on the end of this URL:

<https://surveys.divisionsbc.ca/Survey.aspx?i=>

4. Your final URL will look like this (only with the unique GUID for the user):

<https://surveys.divisionsbc.ca/Survey.aspx?i=64adf2d0-3851-422c-a5fa-3fa1d077f2ab>

5. Create a new invitation or email and send the link to the recipient.

Note: If you have a large number of paper surveys to enter in this way, you can automatically generate the web addresses by using the CONCATENATE function in Excel to join the base URL (<https://surveys.divisionsbc.ca/Survey.aspx?i=>) and recipient Guid: For example: =CONCATENATE("<https://surveys.divisionsbc.ca/Survey.aspx?i=>",B2)

Results & Reporting

How To Manage Incomplete Responses

Unless the respondent goes through the entire survey and clicks on *Finish*, the response will show as incomplete. Incomplete responses will not be displayed reports, but can be included in exported data. To mark a survey as complete for a respondent, open the response record, click on *Edit*, then click through the survey and select *Finish* at the end.

If you can't see the *Edit* button, go into the survey, click *Edit > Settings > Permissions > Show Advanced Settings*. Under *Access List*, select your own name and select *Ungroup permissions*. Ensure *Analysis.Response.Edit* is checked off.

How To Create And Format Reports

For information on how to create and format reports, please refer to the training [documents](#) and [videos](#) created by Checkbox. You may either create a quick report using the report wizard or create a formattable report by choosing to create a blank or custom report. After creating a report, you can also edit individual report items.

See Appendix A of this document to see an example report.

How To Share Or Download A report

To share an online report, you must change the permissions on the report or on the user account:

Option #1 - To make the report public, click on the report, then select *Report Actions > Permissions*. Click on the second tab, labelled *Default Policy* and check off *View Report*. Close the permissions editor, then copy the report URL (web address) and share it.



Option #2 - To require that a user log-in they can view the report, go into the *Users* section and select the user. Under the *User Roles* section, click *Edit*. Check off the *Report Viewer* option. Then, click on the report, select *Report Actions > Permissions*. Click on the third tab, labelled *Add Users / Groups to Access List* and select the user(s) and / or user group(s) you wish to add. Click on the first tab, labelled *Access List* and click on the user or user group. Check off *View Report*. Close the permissions editor, then copy the report URL (web address) and share it.

You may also choose to download the report or individual graphs:

Option #1 – Save As PDF: Select Save As and choose PDF as the file type.

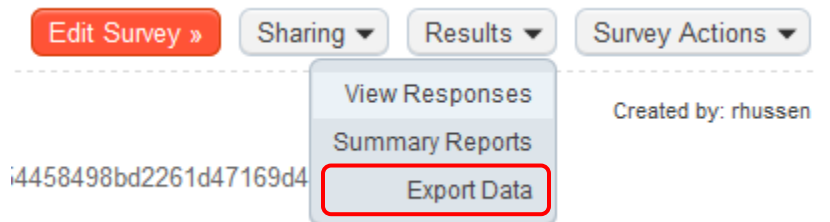
Option #2 – PDF Writer: Select print and use your PDF Writer to save as a PDF.

Option #3 – Copy / Paste: Select All then Copy and Paste the text and images into another application such as Excel or Word.

Option #4 – print or download individual charts from the report by clicking on the download button:  

How To Export Response Data To A Spreadsheet

1. Select the survey.
2. Select "Export Data" from the "Results" drop-down.



3. Select your preferred options from the export window that pops up and select "Export".

How To Include Data From Paper Responses

It is recommended that you require electronic responses as much as possible; however in some cases you may receive a survey response in paper format. If you would like to enter the information but don't need to tie it back to an individual, you can simply enter the responses in manually while logged in as an administrator. Division administrators are able to enter in multiple responses to a survey, even if it is limited to "By Invitation Only":

1. Sign into Checkbox and select the desired survey.
2. Select "Edit Survey" then "Settings" and copy either the "Default URL" or the "Custom URL".
3. Paste the URL into the browser address bar with "&forcenew=true" at the end and click "enter" to go to the page. For example:

Starting URL:

<https://surveys.divisionsbc.ca/Survey.aspx?s=58c807671db5413baecea8e16f363>

End URL:

<https://surveys.divisionsbc.ca/Survey.aspx?s=58c807671db5413baecea8e16f363&forcenew=true>

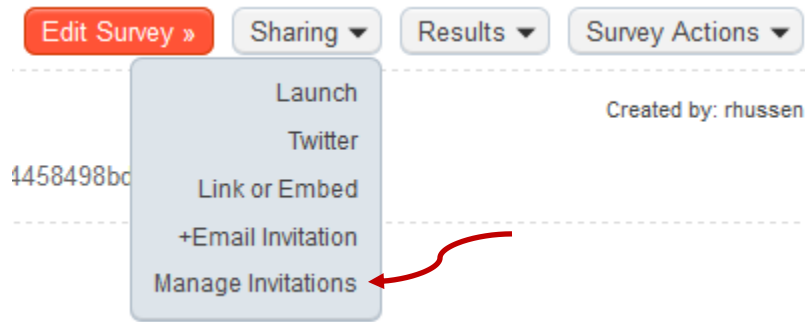
4. Enter the responses and complete the survey.

Note: Administrators are not limited by response limits so ensure that you track which surveys have been entered to avoid duplication.

Note: Responses entered in using the steps outlined above will appear in report summaries and exported data while test responses (Select "Edit Survey" > "Survey Actions" > "Test") will not.

To tie this information back to an individual or user account is more difficult. If the survey doesn't have a required field to identify a participant (name, email etc.), you may add a hidden item with where you can add the respondent's name. For more information on hidden items, refer to the [Checkbox Hidden Items Guide](#). Then you can go into the sent invitation and mark off the individual as having responded:

1. Click on "Manage Invitations" under "Sharing" as shown here:



2. Click on the name of the invitation you sent. A window will pop up with details of the invitation, recipients and responses.
3. Click on "View" All" under "Recipients":



4. Find the user and check the box beside their name.
5. Select "Mark as 'Responded'" and confirm.

Alternatively, you can enter the response from the user's account:

- a. Alphabetize all your paper responses by email address.
- b. Click on "Manage Invitations" under "Sharing".
- c. Click on "Invitation Actions" and select "Export Invitation Details". This will give you an export of each person invited and some details associated with their invitation.
- d. Open the export in Excel, sort the data alphabetically by email address, and remove all rows except for the paper responders.
- e. Identify the user you wish to enter information for and copy the text from the "Recipient Guid" column in Excel. Paste this text on the end of this URL:

<https://surveys.divisionsbc.ca/Survey.aspx?i=>

- f. Your final URL will look like this (only with the unique GUID for the user):

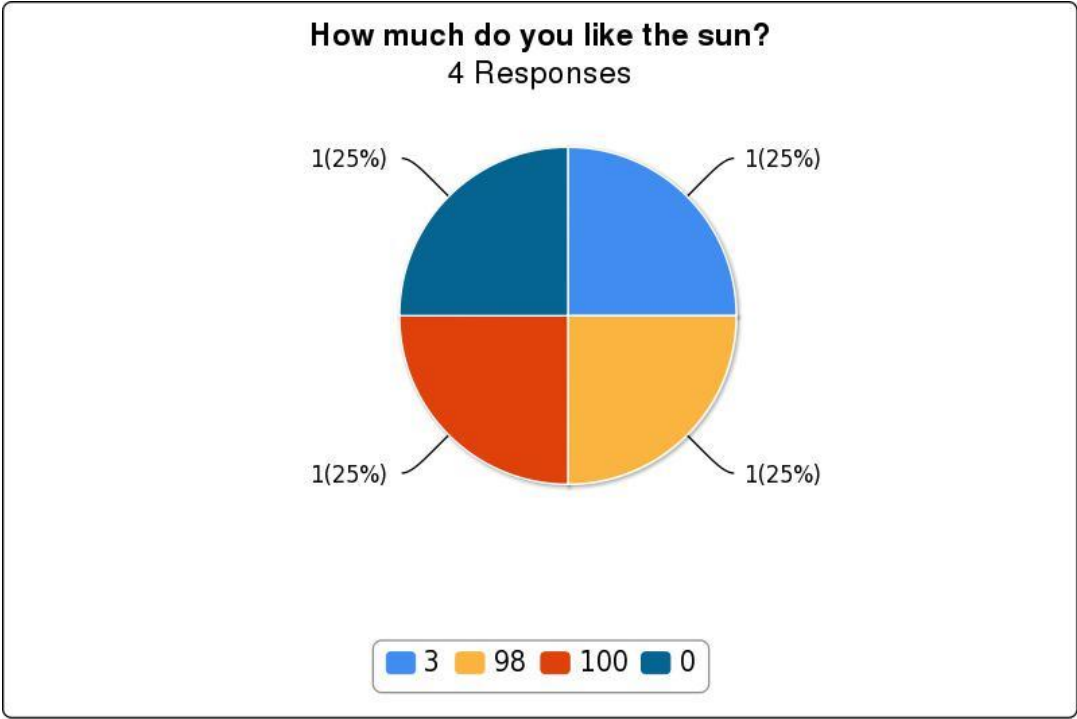
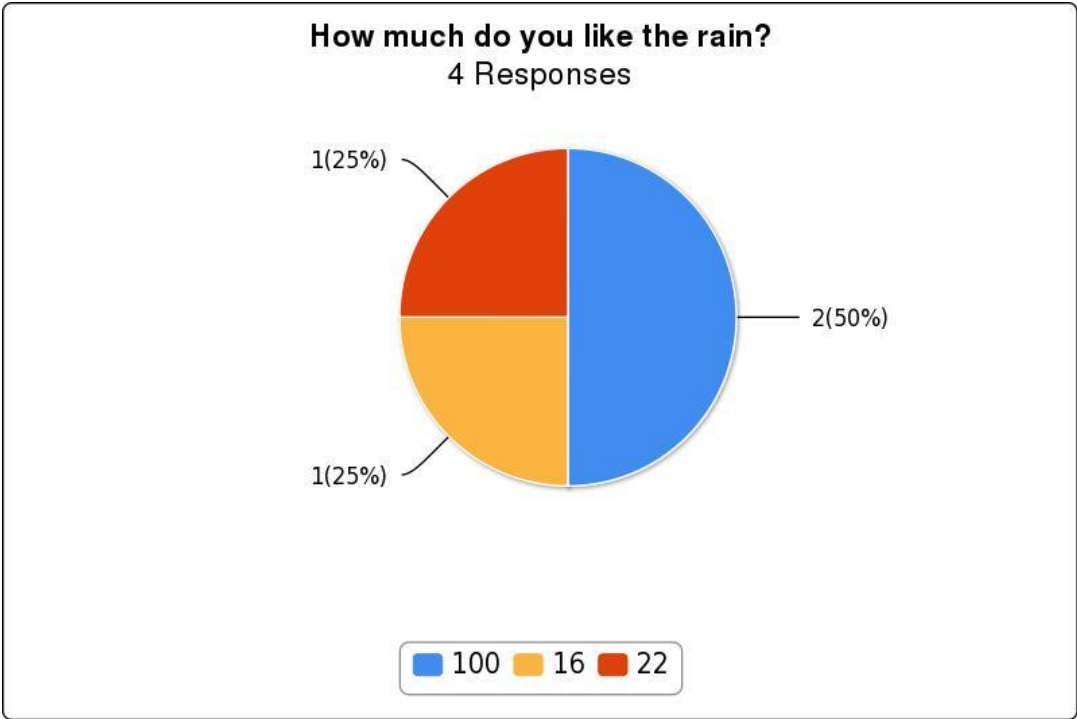
<https://surveys.divisionsbc.ca/Survey.aspx?i=64adf2d0-3851-422c-a5fa-3fa1d077f2ab>

- g. Paste the final URL into the web browser. Click "Enter" and you will be taken to the survey where you can enter the user's responses.

Note: If you have a large number of paper surveys to enter in this way, you can automatically generate the web addresses by using the CONCATENATE function in Excel to join the base URL (<https://surveys.divisionsbc.ca/Survey.aspx?i=>) and recipient Guid: For example: =CONCATENATE("<https://surveys.divisionsbc.ca/Survey.aspx?i=>",B2)

For more information on the CONCATENATE function, refer to [this Microsoft guide](#).

Appendix A: Sample Report





Divisions of Family Practice

A GPSC initiative

Choose 9 of the following options:
4 Responses

Answer	Count	Percent
Option 1	1	5.26%
Option 2	1	5.26%
Option 3	3	15.79%
Option 4	2	10.53%
Option 5	1	5.26%
Option 7	1	5.26%
Option 8	1	5.26%
Option 9	1	5.26%
Option 10	1	5.26%
Option 11	1	5.26%
Option 12	1	5.26%
Option 13	1	5.26%
Option 14	2	10.53%
Option 15	2	10.53%