



## Agency Questionnaires

### **Purpose of this document**

The Agency Activity Review functionality provides users with the ability to create Agency Questionnaires and record data obtained from these Questionnaires. Some examples would be Qualification assessments or Monthly Statistics Surveys. In addition the information can be used to export to external monitoring agencies such as the State of NY HPNAP if necessary.

**Note:** None of the data entered here automatically updates any other Agency fields in Ceres.

*Ceres Object release 5.00.00 is required for the functionality described in this document.*

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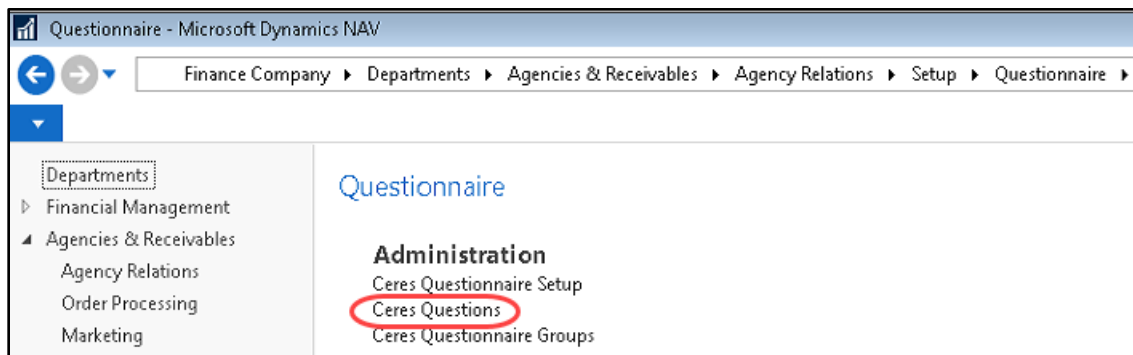
## General Structure

To record the Agency Review data, the Questionnaire(s) must first be setup. Once a Questionnaire has been setup it is then used as the template to guide the food bank through the review process to insure that all required information is gathered and recorded. The setup of Questionnaires involves three steps:

1. Setup of questions.
2. Setup of Questionnaire Header.
3. Linking questions to the Questionnaire Header and defining the Answer Guide.

## Setup of Questions

1. Ceres Questions Setup may be accessed by selecting Departments → Agency & Receivables → Agency Relations → Setup → Questionnaire → Ceres Questions.



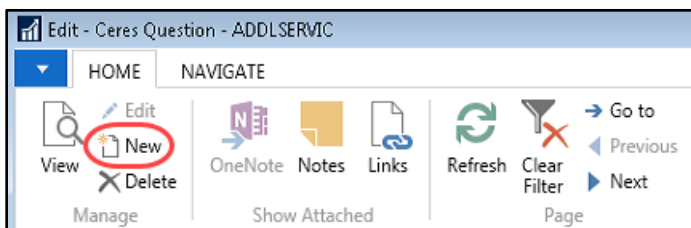
Questions can be used on one or more Questionnaires. If the same question is needed for multiple Questionnaires, it only needs to be setup once in Ceres Questions Setup, regardless if the answers may be different for different Questionnaires.

- The Edit – Ceres Question Page opens. A list of all questions currently defined will be displayed.

**Note:** The line on which your cursor is placed will determine what Code you see at the top left.

Edit - Ceres Question - ADDLSERVIC				
<div> <div>HOME</div> <div>NAVIGATE</div> <div> <div>View</div> <div>New</div> <div>Delete</div> <div>Manage</div> </div> <div> <div>OneNote</div> <div>Notes</div> <div>Links</div> <div>Show Attached</div> </div> <div> <div>Refresh</div> <div>Clear Filter</div> <div>Go to</div> <div>Previous</div> <div>Next</div> <div>Page</div> </div> </div>				
ADDLSERVIC				
Code	Report Text	Column Heading	Answer Type	Type
ADDLSERVIC	Does your agency directly provide or partner with other agencies to provide non-food services?	Non-Food Svcs	Multiple Choice	Multiple
ADULTS	How many adults do you serve	ADULTS	Decimal	Single
CHILDREN	How many children do you server	CHILDREN	Decimal	Single
DECIMAL1	Decimal 1	Decimal 1	Decimal	Single
DECIMAL2	Decimal 2	Decimal 2	Decimal	Single
ELDERLY	How many elderly do you serve	ELDERLY	Decimal	Single
INCREASEFOOD	How much more food could you distribute at your current capacity?	Increase Distr	Multiple Choice	Multiple
MOREFOOD	How would you rate your agency's willingness to distribute more food?	Give More Food	Multiple Choice	Multiple
MULTI1	Multi 1	Multi 1	Multiple Choice	Single
STORAGEEDRY	What is your agency's capacity to store more packaged (dry or shelf-stable) food?	Storage: Dry	Multiple Choice	Multiple
STORAGEFRZ	What is your agency's capacity to store more frozen food?	Storage: Frzn	Multiple Choice	Multiple
STORAGEFRZ	What is your agency's capacity to store more fresh (refrigerated) food?	Storage: Fresh	Multiple Choice	Multiple

- Click Home → Manage → New to create a new question.



- Fill in the information as desired:

Example:

Ceres Question				
Code	Report Text	Column Heading	Answer Type	Type
FOODSOURCE	What is your preferred Food Source?	FOODSOURCE	Multiple Choice	Multiple

**Code:** Enter a unique code to identify the question. Use something short by descriptive such as Adults, Children, etc.

**Report Text:** Enter the question that is to be asked of the agency in the form of a question to aid the user when performing the review.

**Column Heading:** This is a short description that will identify the information being requested when recording answers during the review.

**Answer Type:** Choose from Decimal or Multiple Choice. Decimal will allow for the entry of a number such as a quantity or dollar amount. Multiple choices will allow you to setup multiple answers for the user to select from when answering the question.

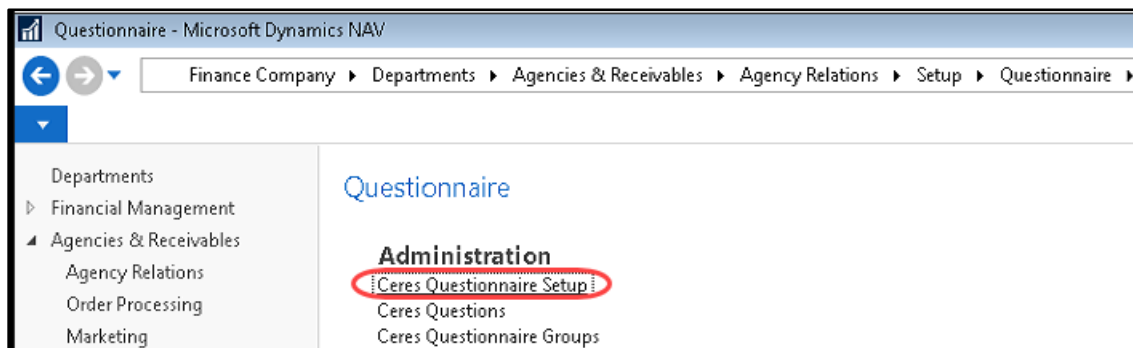
**Type:** Choose from single or multiple. If only one answer is allowed for the question choose single, otherwise choose multiple to allow for more than one answer to be selected for the question. This can also be used to record a date into multiple segments for reporting purposes such as the Submission Date for HPNAP reporting.

5. Repeat steps 3 and 4 as necessary to define as many questions as needed.

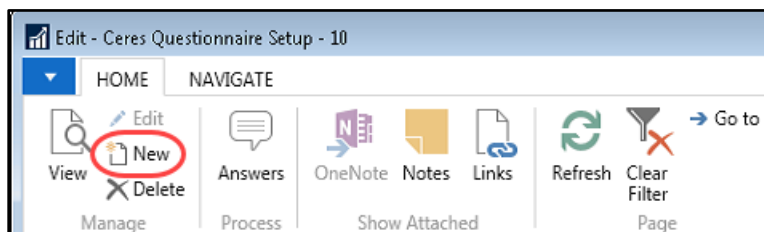
**Note:** Ceres Questions cannot be changed or deleted if on an Active survey.

## Setup of Questionnaire

1. Questionnaire setup may be accessed by selecting Departments → Agency & Receivables → Agency Relations → Setup → Questionnaire → Ceres Questionnaire Setup.



2. The Edit – Ceres Questionnaire Setup window will open. A list of all Questionnaires currently defined will be displayed. To create a new Questionnaire, choose Home → Manage → New:



3. A new line will be created for you to enter the information pertaining to the Questionnaire.

Code	Description	Bloc...	Deny AE Ord...	AE Survey Frequency	AE Survey Status	AE Survey Title	AE Survey Start Date	AE Survey Expiration Date	Created By	Last Modified By	Last Modified Date	AE Survey Grace Period
	In Planning											

**Code:** Enter a unique code to identify the questionnaire. Use something descriptive like HPNAP, TEFAP, etc. to easily identify the questionnaire.

**Description:** Enter a longer description that fully identifies the questionnaire.

**Blocked:** Check this box to prevent entry of reviews against this questionnaire. This is useful, if the questionnaire was to be used to collect information for a period of time and you no longer wish to have users enter additional data into this particular questionnaire.

**Deny AE Ordering:** Check this box if failure to complete the Survey should deny the Agency's ability to place online orders.

**AE Survey Frequency:** How often the survey needs to be completed.

**AE Survey Status:** Whether the Survey is In Planning, Active or Closed.

**AE Survey Title:** An easily recognizable name for the survey.

**AE Survey Start Date:** The Date to be specified as the start of the survey.

**AE Survey Expiration Date:** The Date the survey is to end.

**Created By:** A system controlled field that records User ID for the user that created the questionnaire.

**Last Modified By:** A system controlled field that records User ID for the user that last modified the questionnaire.

**Last Modified Date:** A system controlled field that records date the questionnaire was last modified.

**AE Survey Grace Period:** A defined number of days or weeks that the agency has to complete the survey after the Frequency Date has passed.

Here is an example of a survey we have created a new Questionnaire called HPNAP.

Code	Description	Blocked	Deny AE Ordering	AE Survey Frequency	AE Survey Status	AE Survey Title	AE Survey Start Date	AE Survey Expiration Date	Created By	Last Modified By	Last Modified Date	AE Survey Grace Period
HPNAP	HPNAP Grant Review	<input type="checkbox"/>	<input type="checkbox"/>	1M	In Planning	HPNAP Grant Review	8/1/2019	12/31/2019	ESOPROV/CJW	ESOPROV/CJW	8/7/2019	ZW

This completes the setup of the Questionnaire Header. Next we will assign the questions required for this Questionnaire and define the allowed answers.

- Next we will assign the questions required for this Questionnaire and define the allowed answers. To Define the Answer, click on (highlight) the Questionnaire you wish to work with and then click on Answers:

Code	Description	Bloc...	Deny AE Ord...	AE Survey Frequency	AE Survey Status
CPCTY2019	Agency Capacity Survey	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1W	In Planning
TEFAP	TEFAP Survey 2019	<input type="checkbox"/>	<input type="checkbox"/>	1M	In Planning

- If Answers have already been defined for this Questionnaire, they will be displayed for editing.
- To add a new answer click Home → Manage → New:

Field No.	Questionnaire Code	Question Code	Report Text	Column Heading	HPNAP Export Column...	AE Surv... Req...	AE Survey Decimal Min Value	AE Survey Decimal Max Value
6	TEFAP	DECIMAL2				<input type="checkbox"/>	0.00	0.00
300	TEFAP	TEXT1				<input type="checkbox"/>	0.00	0.00
301	TEFAP	TEXT2				<input type="checkbox"/>	0.00	0.00
302	TEFAP	TEXT3				<input type="checkbox"/>	0.00	0.00

- Then use the Assist Button to select a question from the defined Question List first.

**Note:** The Field No. (if displayed) will not populate until you have saved/moved off the line) and the Questionnaire Code will default to the Code associated with the Questionnaire you selected on the previous window.

The screenshot shows the 'TEFAP · 0 · 0' window. The 'Question List' dropdown menu is open, showing a list of questions with their codes and report texts. The 'CHILDREN' question is highlighted. The dropdown menu includes options like 'Code', 'Report Text', 'ADDLSERVICE', 'ADULTS', 'CHILDREN', 'DECIMAL1', 'DECIMAL2', 'ELDERLY', and 'FOODSOURCE'. The 'CHILDREN' question has the report text 'How many children do you...'. The dropdown menu also includes 'New' and 'Advanced' buttons at the bottom.

- Select the Question that is to be asked of the Agency. Here we've selected the CHILDREN question.
- You will then need to fill in the report text and Column Heading.

**Note:** For HPNAP reporting, select from the available choices for the HPNAP Export Column. If this is not for HPNAP reporting, leave this column blank. Fill in an AE Survey Decimal Min Value and Max Value where applicable.

The screenshot shows the 'TEFAP · 7 · 30000' window. The table below shows the completed question entry for 'CHILDREN'.

Field No.	Questionnaire Code	Question Code	Report Text	Column Heading	HPNAP Export Column...	AE Surv... Req...	AE Survey Decimal Min Value	AE Survey Decimal Max Value
7	TEFAP	CHILDREN	Enter # of children served	Children		<input type="checkbox"/>	0.00	5,000.00

- Repeat steps 9 and 10 to add more answers to the Questionnaire. Once you have completed the answer portion of the Questionnaire click OK.

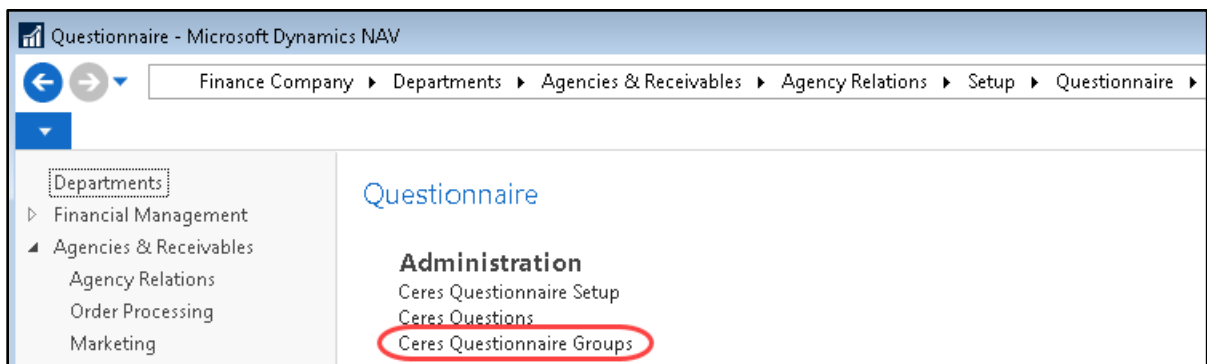


Field No.	Questionnaire Code	Question Code	Report Text	Column Heading	HPNAP Export Column...	AE Surv... Req...	AE Survey Decimal Min Value	AE Survey Decimal Max Value
7	TEFAP	CHILDREN	Enter # of children served	Children		<input type="checkbox"/>	0.00	5,000.00
7	TEFAP	ADULTS	Enter # of adults served	Adults		<input type="checkbox"/>	0.00	5,000.00
6	TEFAP	ELDERLY	Enter # of elderly served	Elderly		<input type="checkbox"/>	0.00	5,000.00

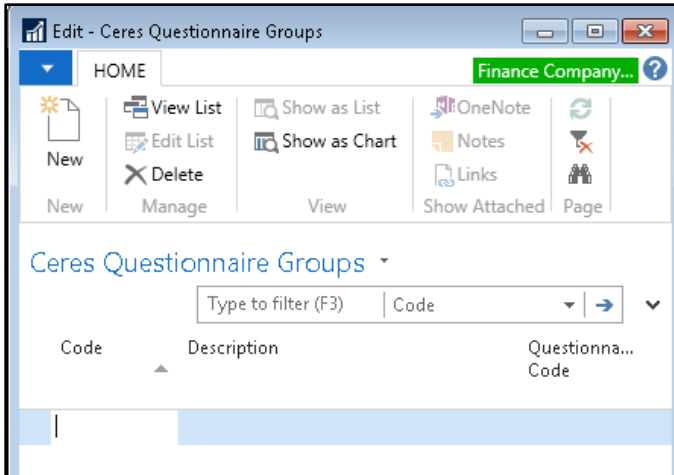
## Setup of Questionnaire Groups

Questionnaire Group Codes provide the ability to associate a Questionnaire with one or more Agencies. Any Questionnaire not represented by a Questionnaire Group is said to be applicable to any Agency.

1. Questionnaire Groups may be accessed by selecting Departments → Agencies & Receivables → Agency Relations → Setup → Questionnaire → Ceres Questionnaire Groups



2. Any existing Questionnaire Groups will be displayed. If none, the window will be empty:
3. Click the “New” icon to create a new Questionnaire Group.
4. Fill in the information as necessary.



**Code:** Enter a unique code to identify the Questionnaire Group.

**Description:** Enter a description of you choosing.

**Questionnaire Code:** Select an existing Ceres Questionnaire.

5. Lastly, for each Agency to which the Ceres Questionnaire applies, specify the Ceres Questionnaire Group Code on the Information FastTab of the Agency Card.

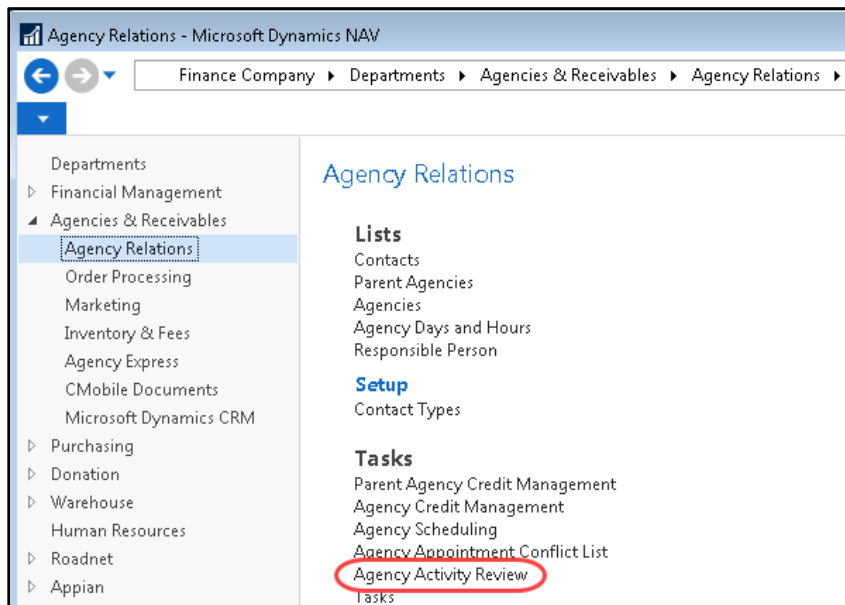
Information	
<b>Agency Express</b>	<b>Other</b>
Agency Group Code:	180
Permit Web Orders:	<input checked="" type="checkbox"/>
AE Survey Online Order Status:	Enabled
AE Quest. Applicable Date:	8/27/2019
<b>Ceres Questionnaire Grp. Code:</b>	CAPACITY
Survey Group Code:	Co... Description
<b>Agency Type &amp; Information</b>	
Service Areas:	CAPACITY Capacity Surveys
Product Sources:	TEFAP TEFAP Group
Funding Sources:	

## Entry of Agency Responses

### Entry from the Task Menu

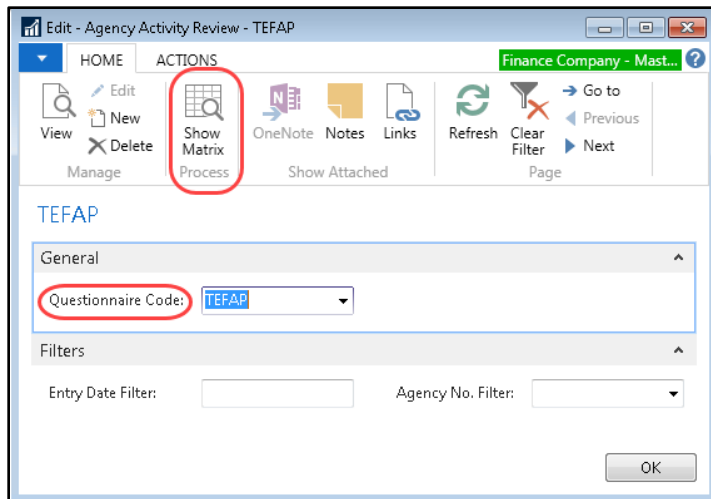
Entry from the Task Menu allows the entry of responses from multiple Agencies at once.

1. The actual data entry of the Agency Review can be accomplished from either the Agency Card or from the menu. To access from the menu go to Departments → Agency & Receivables → Agency Relations → Tasks → Agency Activity Review.

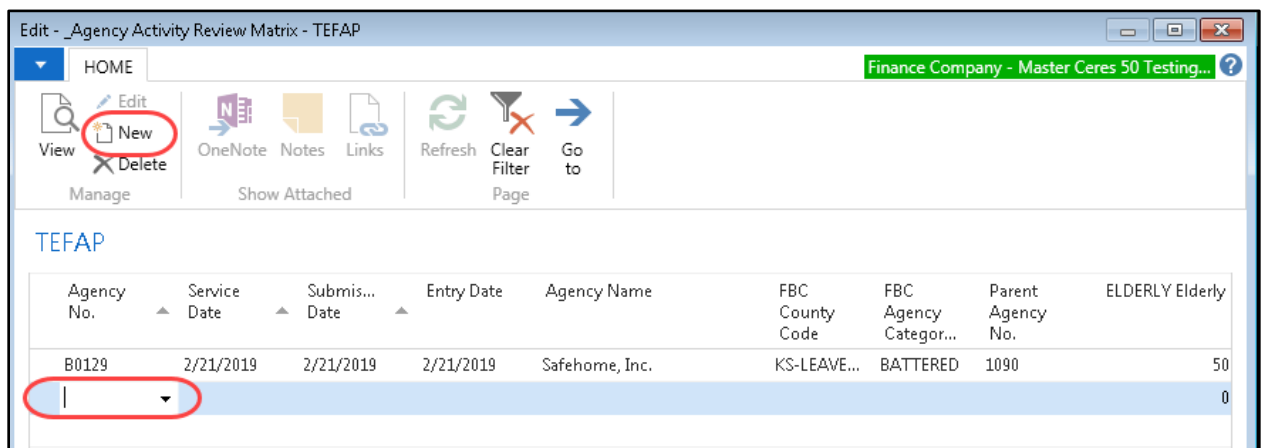


2. Select the Questionnaire you wish to record activity for. You can enter Code if you know it or use the Assist Button to view a list of the defined Questionnaires in Ceres.

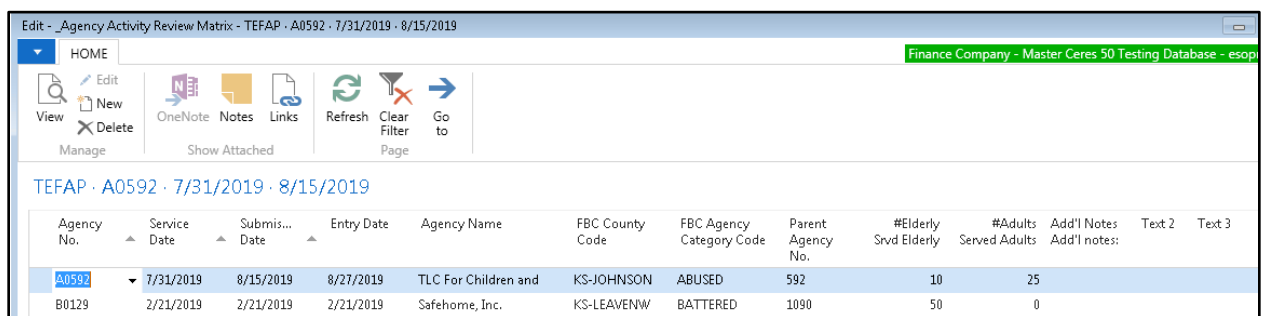
**Note:** If you wish to display previously entered results, you can set an Entry Date Filter and/or Agency No./No's filter before viewing the Matrix:



3. Click on Show Matrix.
4. Select Manage → New to add a new review or just begin entering information on the first blank line in the window:



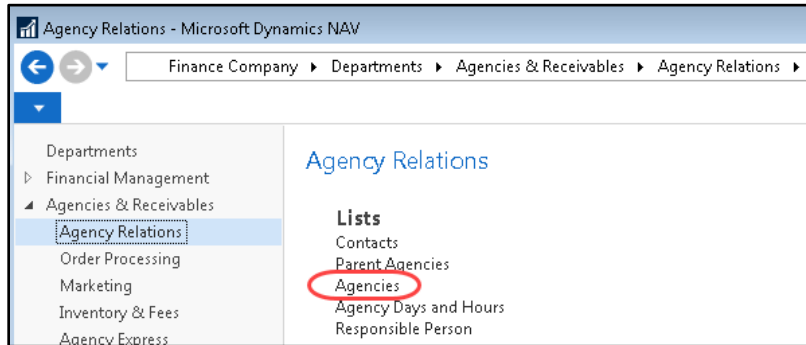
5. Enter the information as required by the Questionnaire. The information required here is dependent upon the setup of the Questionnaire; however, all Questionnaires will require at least the Agency No., Service Date and Entry Date. Decimal answers will allow the entry of a number while multiple choice answers will be presented as a check box that the user can select the appropriate answer.



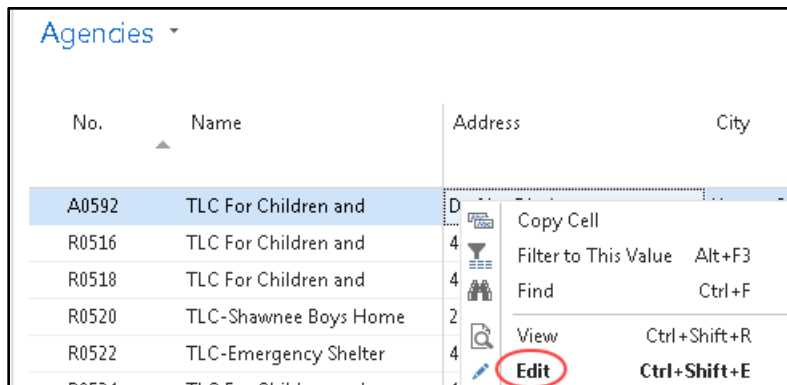
## Access from the Agency Card

Entry from the Task Menu allows the entry of responses for one specific Agency.

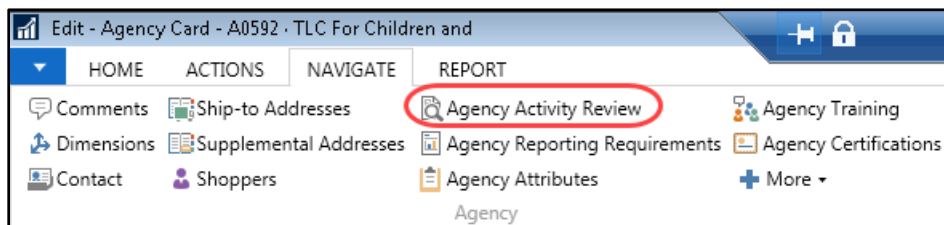
1. To access from the agency card, go to Departments → Agencies & Receivables → Agency Relations → Agencies



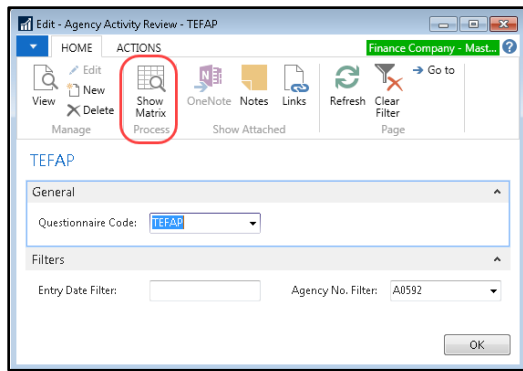
2. Select the Agency you wish to review by right-clicking on it and choosing edit (or by double clicking on the Agency Number).



3. Select Navigate → Agency → Agency Activity Review



4. Fill in the Questionnaire you wish to enter or view. Then click on Process → Show Matrix.



5. All previous responses for this Questionnaire will be displayed for review based on date range for the show Matrix option.

**Note:** If there are no responses within the current time frame, you may need to set an Entry Date Filter for a prior date range to see responses.

TEFAP · A0592 · 7/31/2019 · 8/15/2019												
Agency No.	Service Date	Submis... Date	Entry Date	Agency Name	FBC County Code	FBC Agency Category Code	Parent Agency No.	#Elderly Srvd Elderly	#Adults Served Adults	Add'l Notes Add'l notes:	Text 2	Text 3
A0592	7/31/2019	8/15/2019	8/27/2019	TLC For Children and	KS-JOHNSON	ABUSED	592	10	25			

6. To enter a new review, select Manage → New.
7. Enter the information required by Questionnaire. The information required here is dependent upon the setup of the Questionnaire however all Questionnaires will require at least the Agency No., Service Date and Entry Date. Decimal answers will allow the entry of a number while multiple choice answers will be presented as a check box that the user can select the appropriate answer.

## Related Topics

1. Agency Overview
2. Agency Profiles
3. Agency Groups and Qualifiers
4. Agencies UNC Activity Status by Group
5. Agency Questionnaires and Agency Express 3