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RMS Admin Survey Setup Checklist
Contact StudentSuccessTech@RuffaloNL.com for assistance.

	Tab in RDC	Task
☐	Preparing (not in RDC)	Prepare by reviewing the Online Admin Resource page. Here you will find our templates, video tutorials, and guides. Specifically review and save: • **Key timeline** – reference to make sure you are staying on target with milestones. • **Coordinators Guide** – guide that includes implementation guidelines, general overview of the products and what you should be tracking for outcomes. • **Users Guide** - comprehensive guide on using the Retention Data Center. For a refresher on using the Retention Data Center, watch our video tutorial.
☐	Planning (not in RDC) *Remember to reach out to our team if you need assistance!	The majority of your time will be in the planning phase. Determine how you will: • achieve your desired completion rates • train advisors/success coaches • access reports (will you have them pulled into your campus system or pull them yourself from the Retention Data Center (RDC) • review results with students • use your summary data (outreach list, data pulls for strategic planning, etc) • track your retention goals and outcomes
☐	Survey Settings	Update your survey customization. This includes: • Grouping – students with demographic fields provides additional sorting and filtering opportunities beyond what is collected through the standard items of the surveys. Up to 5 categories can be used; commonly used are Academic Advisor, FYE Instructor, Residence Hall, Indicated Major, etc. • Securing access of reports – This allows you the ability to designate others on campus for access to specific groups of student records (outlined above) with limited access to areas of the Retention Data Center and reports available for students. • Survey entry page: Allows you to request specific information for Id and e-mail. Example: "Please enter your 7-character student Id here. (W234567)" or "Enter your university.edu address here". • Custom Questions – These are multiple choice questions and require a single selection response from the student. They appear at the end of the survey, after the standard items. Custom questions are also filterable and exportable for further analysis. • Narrative text on individual reports - Up to 1,000 characters (500 for SYSA) can be inserted as the first paragraph of each of the categories. • Survey completion email customization - Upon completing the survey, students will receive an automatic email. You can customize the contents of this email message.
☐	Data Import	Use our template to upload a student file containing email address, first name, last name, DOB, and other optional fields. It isn't required that you upload a file, but it is suggested.
☐	Survey Distribution (typically not in RDC)	Determine how you will distribute your survey. • **Distribute the survey specific URL.** This is our most widely used implementation plan. It can be used in printed material, during orientation, as an in-class assignment or in a portal. The survey specific URL can also be turned into a QR code for promotional material. • **Distribute personal URL links.** After students have been imported into your account, you can download their personal URL (under Export Data). This can be used in a portal, emailed locally, or sent via email from the Retention Data Center. We offer sample email templates and resources on whitelisting, but we don't suggest using this as your stand-alone implementation method. Prior to sending emails from the RDC, you will need to complete email/domain verification steps with our team.
☐	Survey Settings	Before launching, be sure to preview your survey and ensure all your customization appears as expected. Survey Sample is found on the Survey Summary section of your survey setup.