

# Creating Surveys & Assessments

Welcome, we will start shortly!

# Meet Your Trainer

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# Learning Objective

By the end of this session, our goal is to arm you with different ways to create and share Surveys and Assessments with your key audiences so you can collect actionable insights.

# Agenda

Overview

Components

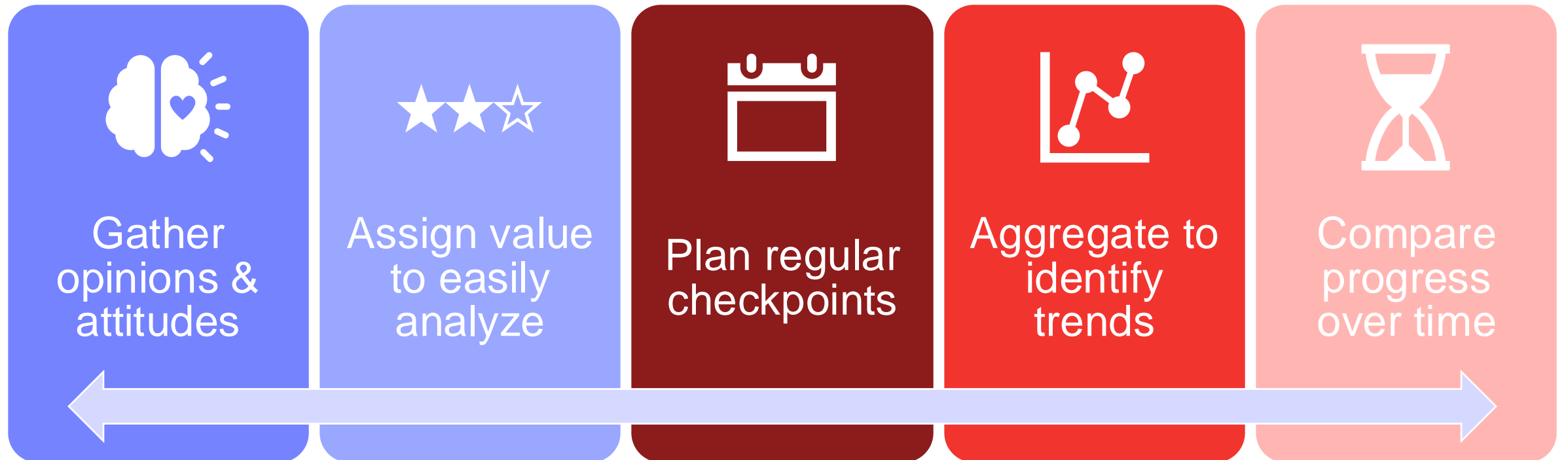
Sharing Options

How to Build

# Overview

# Surveys & Assessments

Opportunity to turn **Qualitative** data into **Quantitative** insights.



# How to Use Surveys & Assessments

## Participants

- Behavioral Assessments
- Skills Assessments
- Mental Health Evaluations
- Risk Assessments
- Needs Survey
- Post-Program Check Ins

## Staff / Volunteers / Donors

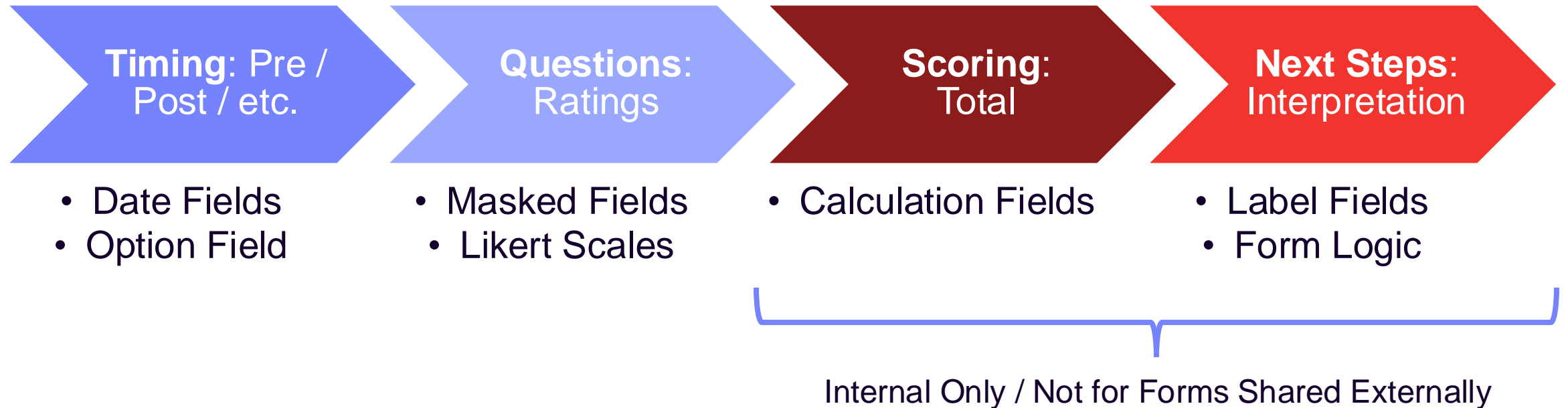
- Opinion Surveys
- Interest Assessments



# Components



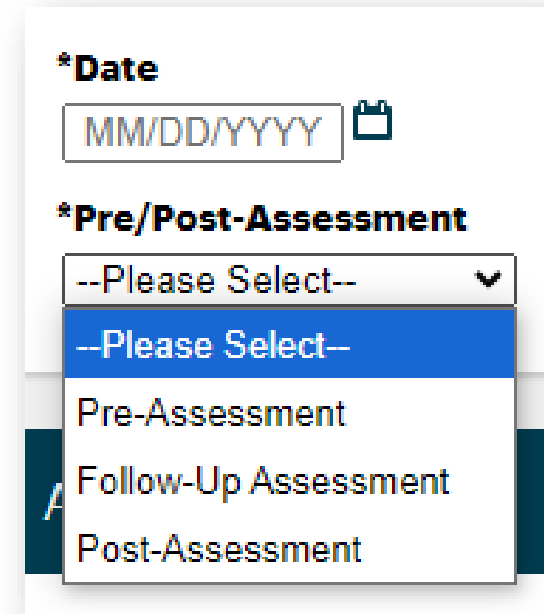
# Components



# Components: Timing

## Date & Option Field

- Important to capture date of survey or assessment.
- Can also categorize time of assessment:
  - Pre / Post / Follow-Up
  - 30 Day / 60 Day / 90 Day
- Creation Date can also come into play for reporting.



The screenshot displays two form fields. The first is a date field labeled **\*Date** with a text input containing "MM/DD/YYYY" and a calendar icon to its right. The second is a dropdown menu labeled **\*Pre/Post-Assessment**. The dropdown is currently open, showing a list of options: "--Please Select--" (highlighted in blue), "Pre-Assessment", "Follow-Up Assessment", and "Post-Assessment".

# Components: Questions

## Weighted Option Fields

- Ability to assign hidden values to answer choices to quantify the options.
- Commonly used for rating scales with values assigned based on preferred choice(s).
- Remember to keep values / directionality the same to make scoring accurate.

### Likert Scale

**I often spend more time trying to think of ways to get out of things than it would take me to do them.**

Strongly Disagree   Somewhat Disagree   Neutral   Somewhat Agree   Strongly Agree

**Asking for help on the job is a sign of being weak.**

Strongly Disagree   Somewhat Disagree   Neutral   Somewhat Agree   Strongly Agree

### Masked Dropdown or Radio Button

Field Properties (masked dropdown)

Display Name: My opinion matters

Standard Properties:

- Required
- Duplicate Check
- Locked
- Quick View
- Searchable
- Hidden
- Restricted
- Clear On Copy

Display Value +      Backend value

Always	5
Sometimes	3
Never	1


# Components: Questions



## Masked Lookup Lists



- Consider creating common scales to reuse for time savings & consistency.
- Recommend 3-5 rating points along each scale (including Neutral or N/A).

### Examples:

- Dissatisfied to Satisfied
- Poor to Best Performance
- Disagree to Agree
- Not Likely to Very Likely

Satisfaction (masked lookup list) 

Build Lookup List  

Display Value 	Backend Value 
Very Dissatisfied	-2
Dissatisfied	-1
Neutral	0
Satisfied	1
Very Satisfied	2
Display Value: Empty Rows will be removed upon save and refresh	Backend Value

# Components: Scoring

## Calculation Fields

- Have Apricot total up backend values for score.
- Again, consistency in direction of values is key.
- Other calculations are possible, but require one Calculation field per operation (+ - x ÷).
- Can hide steps & show only end result if applicable.

**Note:** Calculation Fields are not supported with Connect or Intake; When sharing Surveys or Assessments via these tools, calculations must be done in reporting.

**Field Properties (calculation (+) add)**

Display Name  
Total MHA Assessment Score

Standard Properties

Required  Duplicate Check  Locked  
 Quick View  Searchable  Hidden  
 Restricted  Clear On Copy

Special Properties

Minimum Value  Maximum Value  Currency Type  
None

Tooltip

Component Fields +

I am excited to get out of bed each morning

My life has a purpose

+ My opinion matters

Delete Apply

# Components: Next Steps

## Label Field & Form Logic

- Ability to provide instructions to staff based on score.
- Create hidden Label fields based on different outcomes.
- Use Form Logic to unhide based on calculated score.

The screenshot displays a configuration interface for a form. At the top, there is a section for 'Total Score' with a text input field and a gear icon for settings. Below this is a text field containing the instruction: 'A score of 20 or more indicates participant could benefit from some additional soft skills straining', also with a gear icon. The interface is divided into sections: 'System Fields' (with a right-pointing arrow and gear icon) and 'Form Rules' (with a downward-pointing arrow and a 'New Rule' button). Under 'Form Rules', there is a section for 'High Score' (with a downward arrow and gear icon). It includes a '+ Conditions' section with the rule 'Total Score Is Greater Than 19' and a '+ Actions' section with the action 'Unhide A score of 20 or more indicates participant could benefit from some additional soft skills straining field'.

# Sharing Options

# Sharing Options

How you plan to share these forms determines the best configuration.



**Face-to-Face – Tier 2 Form**



**Anonymous Surveys – Tier 1 Intake Form**



**Virtual Assessments – Connect & Direct Messages**



# How to Build



# Face-to-Face: Tier 2 Form

- To be filled out by staff when meeting with a Participant.
- Recommend Tier 2 form in Participant Document Folder.
- Can include Calculation & internal notes to qualify the score.

**Step 1:** Build New Tier 2 from Scratch.

**Step 2:** Add Masked Option Fields.

**Step 3:** Add Score Calculations.

**Step 4:** Add Instruction Label Field(s).

**Step 5:** Publish for use.

Soft Skills Assessment

Main ▾

Date \*  
MM/DD/YYYY

Pre/Post-Assessment \*  
--Please Select--

Assessment ▾

I often spend more time trying to think of ways to get out of things than it would take me to do them.

Strongly Disagree   Somewhat Disagree   Neutral   Somewhat Agree   Strongly Agree

Asking for help on the job is a sign of being weak.

Strongly Disagree   Somewhat Disagree   Neutral   Somewhat Agree   Strongly Agree

# ? Anonymous Surveys: Tier 1 Intake Form

- To be shared externally & filled out without capturing name.
- Recommend Intake Form based on Survey Tier 1.
- Cannot include Calculation or internal notes.

**Step 1:** Build New Tier 1 from Scratch.

**Step 2:** Add Masked Option Fields.

**Step 3:** Create Intake Form Version.

**Step 4:** Publish & Share Link.

**Step 5:** Use Report to Calculate Score.

The screenshot shows a Bonterra Satisfaction Survey form. At the top left is the Bonterra logo. The title is "Satisfaction Survey" with a red asterisk and the word "Required" to its right. Below the title is a thank-you message: "Thank you for taking the time to share your thoughts on your recent experience." A "Date\*" field is present with a placeholder "mm/dd/yyyy" and a calendar icon. The first question is "Please rate overall how you feel about your experience" with a horizontal scale from 0 to 100. Below the scale are five radio button options: "Disappointed", "Neutral", "Fair", "Good", and "Exceptional". The second question is "Please rate how you feel your relationship was with your contact" with a similar horizontal scale and five radio button options: "Disappointed", "Neutral", "Fair", "Good", and "Exceptional". The third question is "Do you feel the staff were: Supportive?" with a horizontal scale and two radio button options: "Yes" and "No". The fourth question is "Do you feel the staff were: Helpful?" with a horizontal scale and two radio button options: "Yes" and "No".



# Virtual Assessments: Connect & Direct Messages

- To be shared externally in Connect Portal or via Direct Message.
- Recommend Tier 2 form in Participant Document Folder.
- Cannot include Calculation or internal notes.

**Step 1:** Build New Tier 2 from Scratch.

**Step 2:** Add Masked Option Fields.

**Step 3:** Publish & Share via Connect or Message.

**Step 4:** Use Report to Calculate Score.

The screenshot displays the Bonterra Connect interface. On the left is a dark sidebar with navigation options: Dashboard, Form Submissions, ALL ASSIGNED FORMS, and Empowering Families. The main content area shows a survey titled 'Please share your opinion on the following items, rating their importance to your volunteering experience.' There are four items, each with a horizontal scale from 'Not Important' to 'Very Important' and a 'Somewhat Important' label in the middle. The items are: 'Having flexibility in volunteering tasks', 'Learning something new while volunteering', 'Seeing the impact of my volunteer hours', and 'Interacting with the people I am supporting'. Each item has a slider with three circular markers.

# Additional Resources

# Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

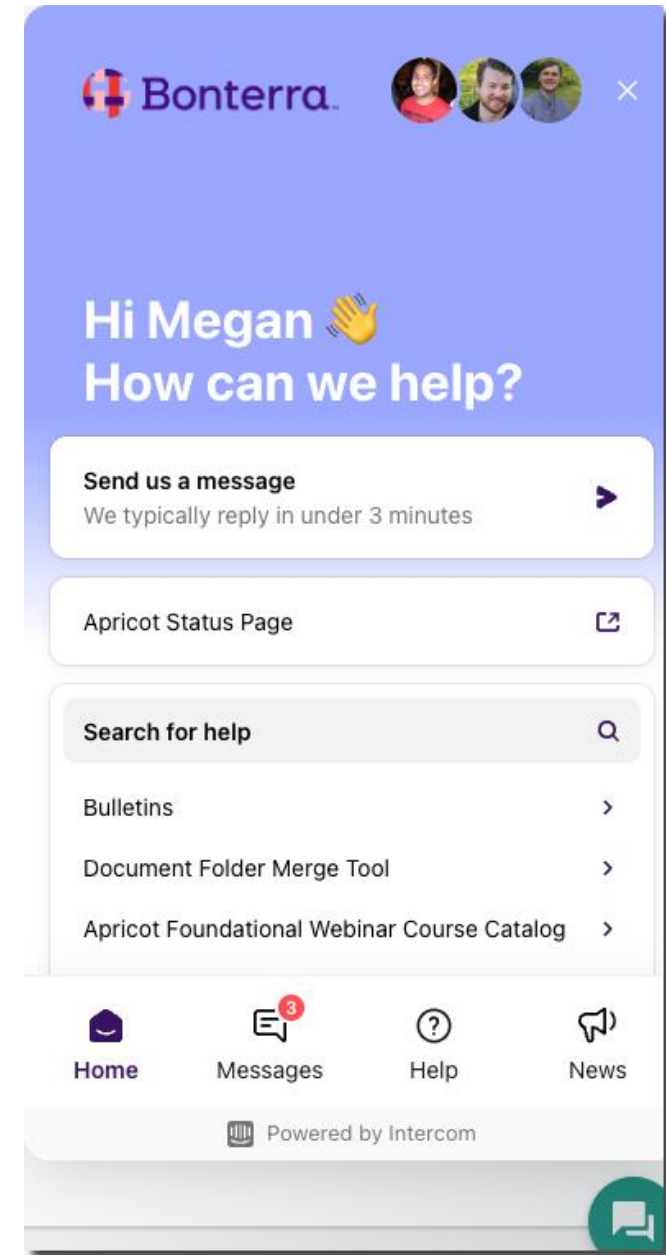


Build confidence & knowledge in  
our software!

# Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email:  
[apricot@bonterratech.com](mailto:apricot@bonterratech.com)



# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!





Thank you for attending!

We hope to see you  
in future trainings.