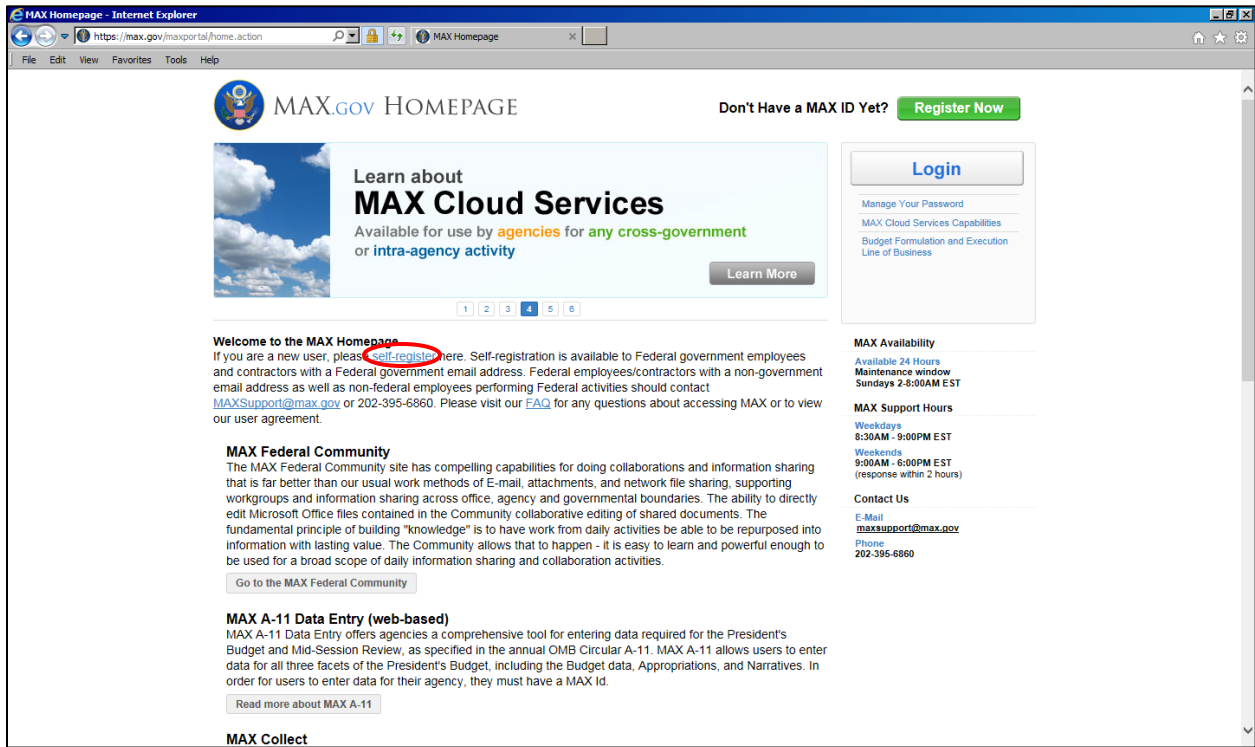


# How to Navigate MAX Survey

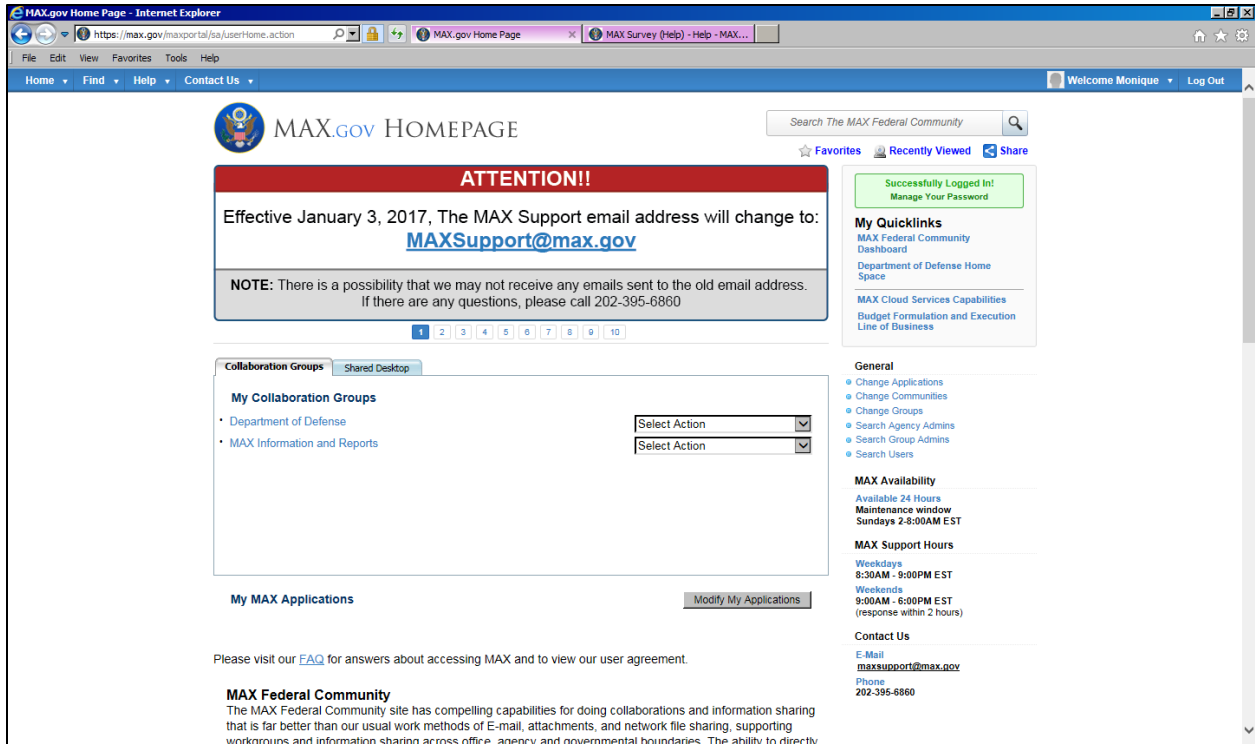
*\*This information for this presentation was taken from the website: [www.max.gov](http://www.max.gov)\**

Homepage: [www.max.gov](http://www.max.gov)

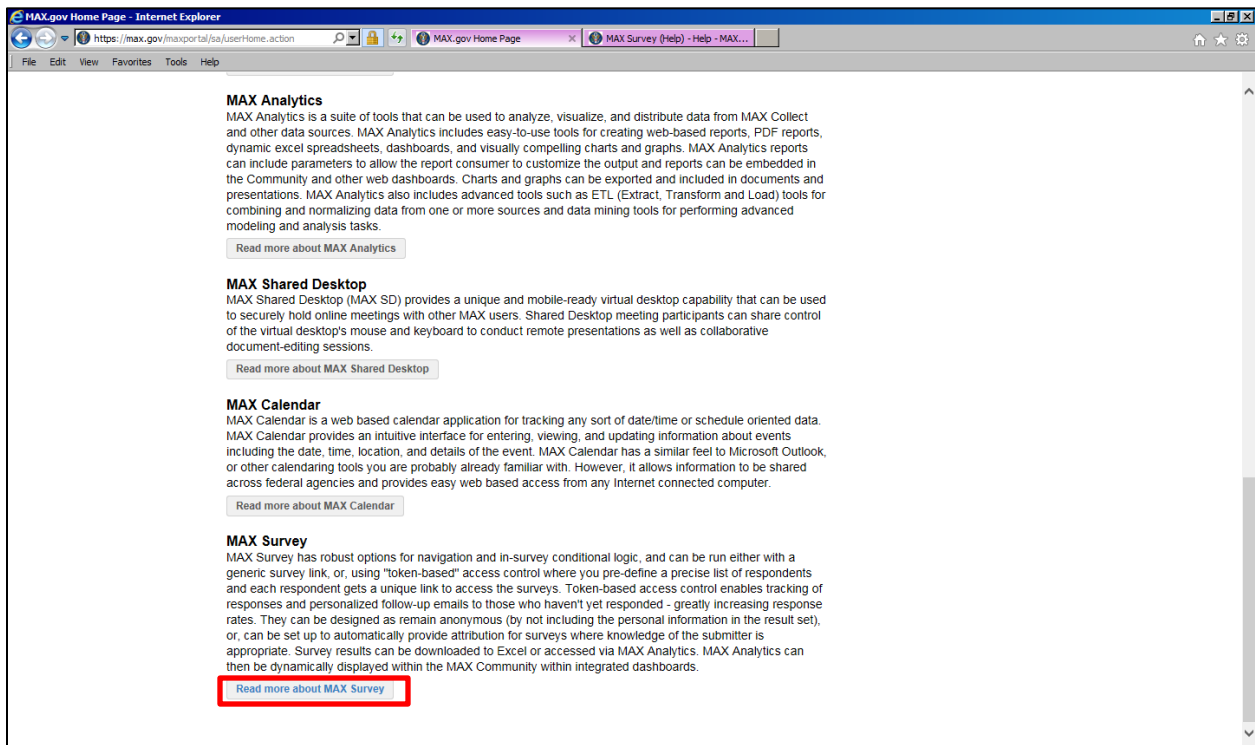


First time users will need to Register. You can do this with a Username and Password or using your CAC.

Once logged on, you come to this screen.

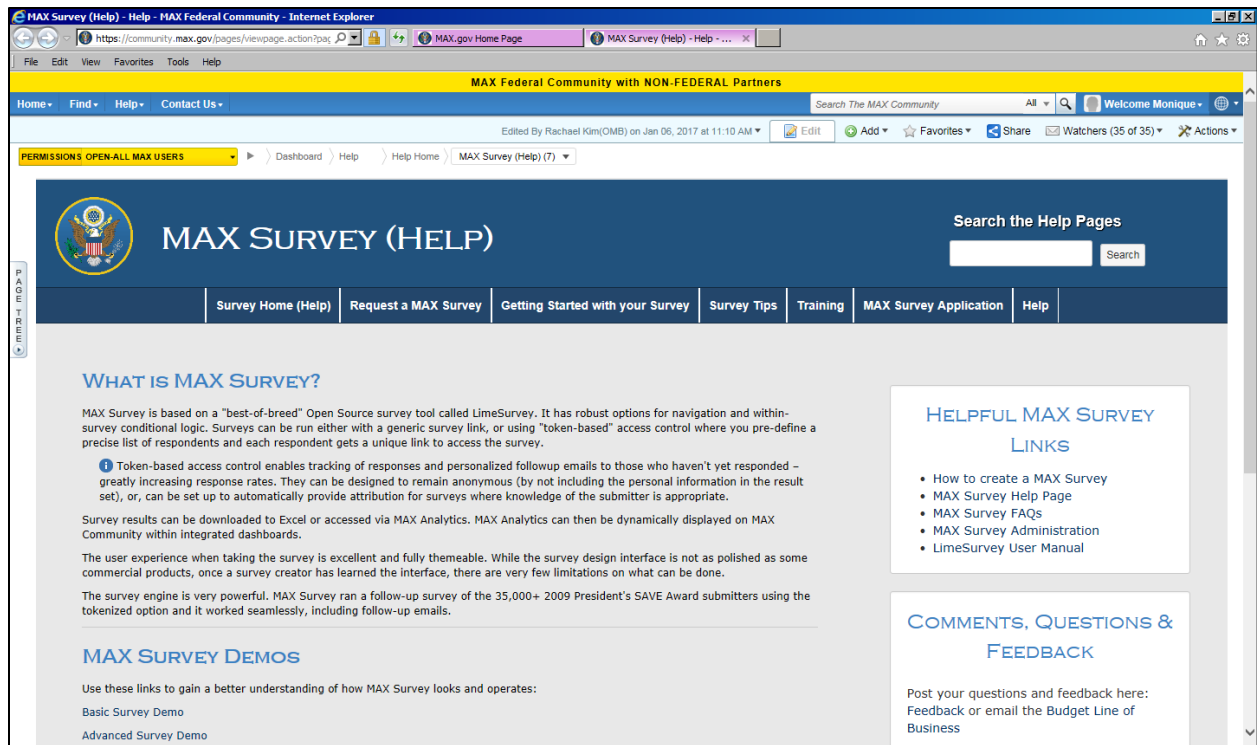


Scroll to the bottom of the page and click on “Read more about MAX Survey”



This will take you to the MAX Survey page:

Monique Carter, MBS  
Clinical Research Coordinator  
March 1, 2017



In order to build a survey, you must **FIRST** request a MAX Survey. By clicking on the “Request a MAX Survey” tab, you will see the following:

### MAX Survey Usage Guidelines

MAX.gov is a government shared services provider that relies on the contributions of our most active users in order to sustain reliable services. Five surveys with fewer than 500 respondents and 50 questions per survey are included with your MAX membership each year. If your office does not have a MAX membership or your survey needs meet one or more of the following criteria, please contact the MAX Shared Services team at [maxsupport@max.gov](mailto:maxsupport@max.gov) or (202) 395-6860 to discuss partnership opportunities or visit <https://go.max.gov/sharedservices>:

- Need more than **5 surveys annually**
- Will have more than **500 participants**
- Require **Authenticated surveys** (MAX ID) requiring a large number of new MAX users
- Will have more than **50 questions per survey**
- Need **custom branding** or logo
- Have **custom data export** needs
- Need integration with **MAX Analytics**

### Request a Survey

To request a new MAX Survey please fill out this survey:  
<https://survey.max.gov/index.php/849634/lang-en>

You will be notified once your survey has been created.

⚠ If you need immediate attention, please contact MAX Support at 202-395-6860,  
[maxsupport@max.gov](mailto:maxsupport@max.gov)

Monique Carter, MBS  
 Clinical Research Coordinator  
 March 1, 2017

## MAX SURVEY REQUEST FORM

Have you administered a MAX Survey before?

Choose one of the following answers

Please choose


How many surveys are you requesting (or do you anticipate needing in the near future)?

Only numbers may be entered in this field.

When do you need your survey(s) to go live?

Date picker ...

Approximately how many users will be accessing your survey?

 This estimate should include users entering data, reviewers accessing your survey, and number of people who may want to see reports associated with the output.

Please **name and number** your requested survey(s) and describe their purpose.

associated with the output.

Submit

### Email Response after Submitting Request

-----Original Message-----

From: Hewitt, Peter (Contractor) [[mailto:Peter\\_N\\_Hewitt@omb.eop.gov](mailto:Peter_N_Hewitt@omb.eop.gov)]

Sent: Wednesday, May 11, 2016 4:42 PM

To: Carter, Monique R CTR (US)

Subject: [Non-DoD Source] Your MAX survey

Hi Monique,

Thanks for your survey request. For all BUMED/NAVMED survey requests, the user requesting the survey must supply an email or letter from their leadership indicating that the survey is approved and that the survey complies with DoD/NAVMED survey polices. Once you supply that letter or e-mail, I will get your survey started. Thanks for your help.

Monique Carter, MBS  
Clinical Research Coordinator  
March 1, 2017

Many of the letters/emails are very simple with just a sentence or two authorizing the survey. The letter/email needs to come from the CO/XO/ or one of the Directors. The only exception to this is if you have an approved IRB letter for a study. Please let know if you have any questions/concerns.

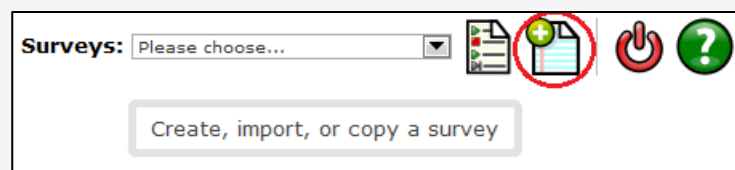
## Creating Surveys

If you are a first time user, check out a

[YouTube tutorial to create a new survey](#)

If you are not a first time user,

- 1) Go to the [MAX Survey Homepage](#)
- 2) Select the "**Create, Import, or Copy a Survey**" icon in the upper right-hand corner.



3) You will be brought to a page where you can fill out basic information about the survey such as the title, description, welcome message and ending message.

[For more information on survey settings, click here.](#)

Once you save your information, you can now begin creating the questions for your survey.

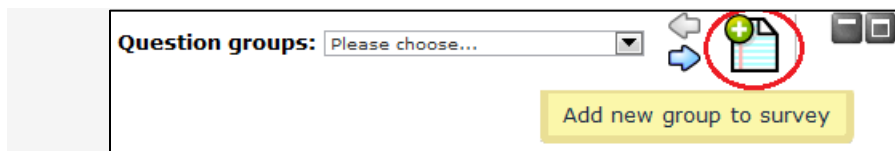
## Importing a Survey

Alternatively, if you have an existing survey file in \*.lss, \*.csv, \*.txt, or \*.lsa format, you can import the survey by clicking on the "**Create, Import, or Copy a Survey**" button, clicking the "**Import**" tab, uploading the survey file, and clicking "**Import Survey**".

## Adding Questions to your Survey

1) To begin creating questions, you will need first to create a **questions group**. A survey requires each question to be a member of a group. Depending on the number of questions in the survey, groups can be used to define logical sections, common subject themes, or possibly pages on the screen. A group can have questions about a similar subject or simply be set up as a manageable number of questions.

- To create a questions group click the "**Add New Group**" icon in the upper right-hand corner.

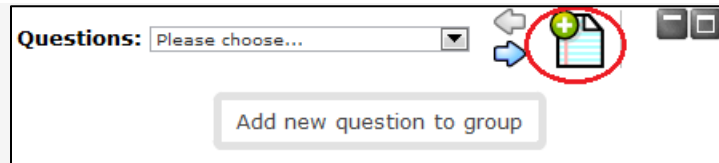


- Give the group a title, and you may also note the types of questions you will have in this group in the description section.

- When you are done filling out information, click "**Save New Group**".

**i** You can always go back and edit this information by clicking the

**2)** Next, you can begin creating questions for a question group. To add a question to the group, select the "**Add New Question to Group**" icon.



**3)** On the "**Add a New Question**" page, fill out the question code (assign a number) and the question you want to appear. If you would like, you may also write out help instructions for guidance on how to answer the question in the help box.

**4)** Now that you have composed your question, you can select the question type from the drop down list. There are many different question types ranging from simple text box answers to predefined lists and ranges.

**i** To learn about all of the question types available please reference the [Question types help page](#)

Save

**Code:**

**Question:**

**Help:**

**Question type:**

**Question group:**

**Mandatory:** Yes  No


**Relevance equation:**


**Validation:**

**Position:**

[Show advanced settings](#)

5) Once you select your question type, click "**Save Question**". Depending on the type of question you have selected, you may be prompted to add answer options.

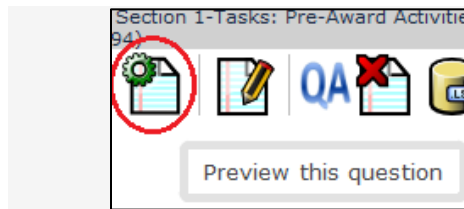
- To add answer options, click on this icon 
- You will be brought to a page where you can fill out the question answer parameters based on the type of question you selected (i.e. if you selected drop down list fill out the items you want to appear in the list).

- To add default answer text, click on this icon 

6) Fill out each individual answer option you would like to be displayed by first assigning them an individual code then in the second column write the answer as you want it to appear.

- When you are finished, click "**Save Changes**"

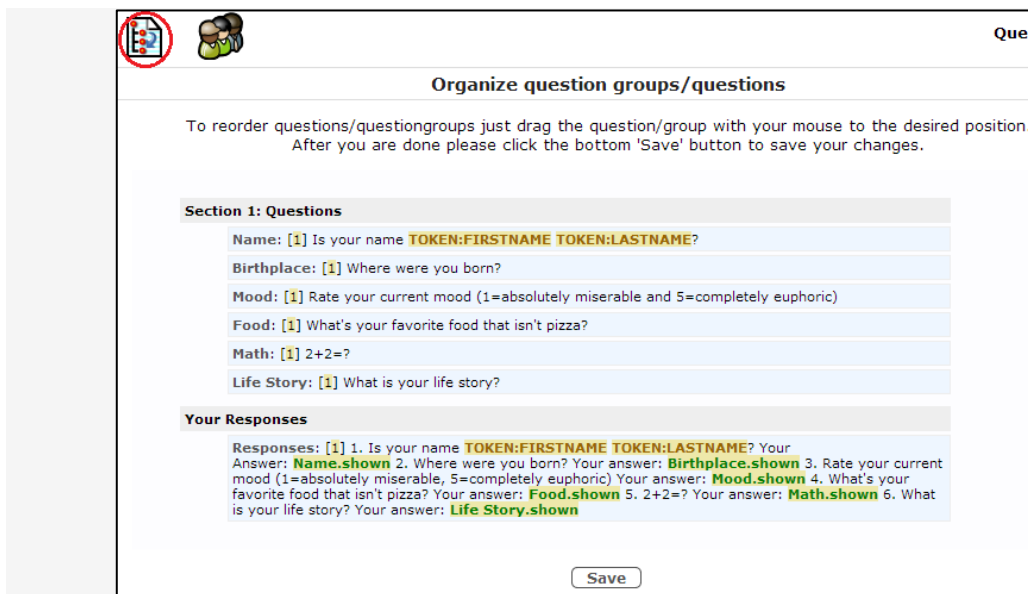
You can now preview your question by selecting the "**Preview this Question**" button shown below



7) You can continue adding questions by selecting the "**Add New Question**" icon and repeating steps 5-9 for as many questions as you wish.

**i** Remember you can also group questions together by placing them different question groups.

8) You may also reorder questions by clicking the "**Reorder question groups/questions**" icon. On this screen, you can drag and drop questions and/or question sections into your desired order.



**Organize question groups/questions**

To reorder questions/questiongroups just drag the question/group with your mouse to the desired position.  
After you are done please click the bottom 'Save' button to save your changes.

**Section 1: Questions**

- Name: [1] Is your name **TOKEN:FIRSTNAME TOKEN:LASTNAME**?
- Birthplace: [1] Where were you born?
- Mood: [1] Rate your current mood (1=absolutely miserable and 5=completely euphoric)
- Food: [1] What's your favorite food that isn't pizza?
- Math: [1] 2+2=?
- Life Story: [1] What is your life story?

**Your Responses**

Responses: [1] 1. Is your name **TOKEN:FIRSTNAME TOKEN:LASTNAME**? Your Answer: **Name.shown** 2. Where were you born? Your answer: **Birthplace.shown** 3. Rate your current mood (1=absolutely miserable, 5=completely euphoric) Your answer: **Mood.shown** 4. What's your favorite food that isn't pizza? Your answer: **Food.shown** 5. 2+2=? Your answer: **Math.shown** 6. What is your life story? Your answer: **Life Story.shown**

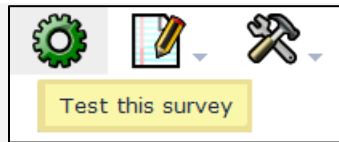
Save



For advanced question settings please reference the [Lime Survey Advanced questions page](#)

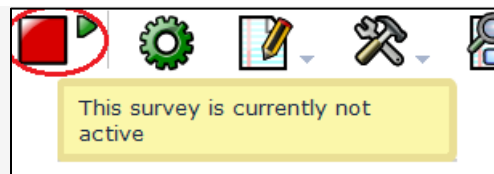
### Testing Your Survey

When you have completed creating your questions, you can test your survey by clicking the "**Test this Survey**" button pictured below.



### Activating Your Survey

To activate your survey, click the 'activate survey' button picture below.



### Closing a Survey

There are two ways for closing a survey: **Expiry** or **Deactivation**.

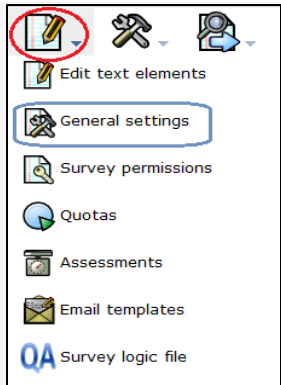
It is strongly recommended to use the expiry option to close a survey - See below why.

#### > **Option 1: Expiry**

- No results lost
- No respondent information lost
- Change of questions, groups and parameters is limited
- An expired survey is not accessible to participant (they only see a message that the survey has expired)
- It's possible to perform statistics on responses inside Lime Survey

#### **To set the Expiry Option:**

- 1) Click "**Survey Properties**" then "**General Settings**"



2) Click the "Publication Access and Control" tab.

3) Edit the "Expiry Date/Time" field to the date and time you wish to close your survey.

### > Option 2: Deactivation

- All results lost (at least you cannot access them via Lime Survey)
- All respondent information lost
- An expired survey is not accessible to a respondent (only a message appears that you are not permitted to see this survey)
- All questions, groups and parameters are editable again

### To set the Deactivation option:

Click on "Stop this Survey" in the administration panel pictured below.



## Inviting Participants to Take Survey

Once you're finished creating your survey and have activated it, you are ready to create your tokens list to sign people up to take the survey.

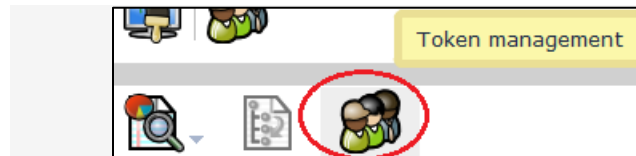
To manage your survey participants, MAX Survey uses **Tokens**. The tokens feature allows you to do the following:

- Manually create invitations (name, email address, ...)
- Import a list of names and email addresses for participants (from a CSV file or an LDAP query)
- Add/Remove invitations
- Generate a unique token number for each participant (invitation code)
- Send an email invitation to each person in your list, by group or individually
- Send a reminder email to each person in your list who has not yet responded, by group or individually
- Track who from your list has responded
- Restrict access against people who have not got a token, and those with a token who have already responded
- Edit/change any details in your list

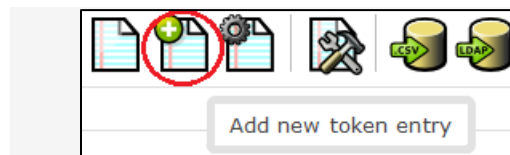
## How to Set up Tokens

1) To begin, click on the "**Token Management**" button in the top left-hand corner of the screen.

⚠ You will be taken to a warning window, select "**Initialize Tokens**" and then select "**Continue**."



2) To add a user click the "**Add New Token Entry**" button in the upper left-hand corner of the screen pictured below.



3) Enter the information for the following fields of the person you wish to participate in the survey:

- **First and last name:** Participant's first and last name (can be used in the emails & survey)
- **Email:** Participant's email address
- **Email status:** A field to keep track of bad emails. For instance, if the survey administrator received email error notifications from this email, the he can set this field to anything other than 'OK' (for instance 'user unknown', or 'mailbox quota exceeded'). Marking this token with an email status other than 'OK', will help skip this entry when sending invitation or reminder emails. Note that this is

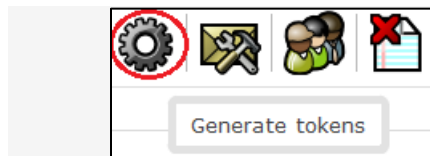
completely manual, unless you decide to implement a script which does update this field automatically.

- **Token:** This is the invitation code. By default, it is automatically generated by the 'Generate tokens' button
- **Language:** If you want to set the default language for this participant
- **Invite sent:** Defaults to 'N', otherwise contains the date when the invitation email was sent
- **Completed sent:** Defaults to 'N', otherwise contains the date when the survey was submitted
- **Uses left:** A counter of number of times the token can be used.
- **Valid from & Valid until:** You can set a date/time range where this token would be allowed to use. You can leave these empty if you don't want to limit participation time frame for certain users. Note: If the user is answering the survey and the participation time ends then the user is locked out immediately and won't be able to finish the survey.
- **Attributes:** These are user-definable attribute fields.

4) Repeat the process to add all the users you would like to participate in your survey.

5) When you have completed adding users click the "**Generate Tokens**" button (pictured below) and MAX Survey will automatically generate and assign tokens to each user.

⚠ If you enter in tokens for each user manually, you can skip this step.

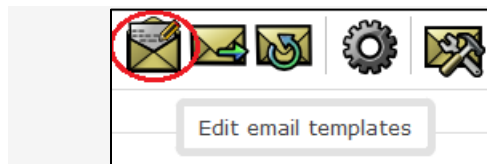


### Emailing Invitations and Reminders to Survey Participants

Once you have all your tokens set up, you are now ready to send invitations out to participants to take your survey.

#### Setting Up Email Text

1) To edit the text of your invitation email, click the "**Edit Email Templates**" button pictured below.



2) Fill out the email templates with what you would like your survey participants to see.

a) **Invitation Email Subject:** The subject line for the invitation email that gets sent out when tokens are used with your survey.

b) **Invitation Email:** This is the text for the invitation email that gets sent out when tokens are used with your survey. This is initially filled by the default invitation message but you can modify it to suit yourself.

⚠ On this same page you can also edit the email messages sent out for:

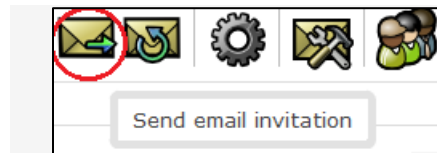
- **Reminder Emails** This is used to remind users that they have not completed the survey.
- **Confirmation Email:** This is the text of the email that gets sent to users after completion of the survey.
- **Public Registration Email:** This is the text for the invitation email sent to members of the public who register for a survey (this only applies if you make your survey open to the public).

3) Click **Save** and you are now ready to send out the emails.

Sending Emails (Invitation and Reminders)

### **Sending Invitation to Participate in Survey Email**

For sending out survey email invitations, simply click the "**Send Email Invitation Button**" pictured below:

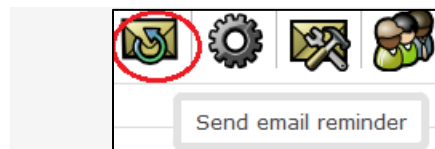


### **Resending Invitations**

- Sometimes you might want to send invitations again to certain token entries / persons. When you use the **send invitations-function only**, email addresses that have not previously received an invitation will get one. This means that if you add new addresses to the token list after the first time you sent invitations, only these new addresses will receive an invitation the second time you send invitations.
- This means that you can also edit/change an email in a particular token entry that you got a bounce from and then send to only this edited address. Just substitute the **Date Invite Sent** for a **capital N (no)** and click "**Send Invitations**" again.

### **Sending Reminders**

- To send an email reminder to take the survey, click the "**Send Reminder**" button pictured below.



### **OTHER THINGS YOU CAN DO IN MAX SURVEY**

- View Your Results while survey is still being conducted
- Export Your Results to Microsoft Excel or Word
- Display Your Results
- Set Up Assessments to score and evaluate your survey