Course Evaluations & Surveys Project Checklist

Account Settings		
Site Settings reviewed (and account Time Zone checked).	Yes ☐	No ☐
Manage Administrators— all administrators have been added with needed permissions and access levels.	Yes ☐	No ☐
Outgoing email settings—you have added a real e-mail address from your institution.	Yes ☐	No ☐
Hierarchy Builder is complete (if not importing).	Yes ☐	No ☐
If importing Hierarchy logic from LMS, all levels have been imported and mapped correctly.	Yes ☐	No ☐
Hierarchy Mapper—all lower levels have conditions.	Yes ☐	No ☐
If you are using the user integration with your LMS, you have tested and confirmed the survey notification is firing as expected.	Yes ☐	No ☐
Help Center – you have successfully accessed the online Help Center.	Yes ☐	No ☐
Integration settings - you have reviewed the account-level integration settings (including "Do it Later")	Yes ☐	No ☐
Surveys		
Single Selection questions are not accidentally entered as Multiple Selection questions.	Yes ☐	No ☐
The Numeric Weightings for all survey question Response Options are correct.	Yes ☐	No ☐
All Non-Numeric (e.g., N/A) responses utilize the Non-Numeric option.	Yes ☐	No ☐
For team-taught courses, all Instructor-specific questions are enabled.	Yes ☐	No ☐
Project Properties		
Project dates are aligned with your course survey period.	Yes ☐	No ☐
Custom Questions are enabled (if allowing instructors or administrators to add their own questions).	Yes ☐	No ☐
Exit Button: The best practice is to enable the Exit button AND enable Hide Exit button 3-5 days before survey end date to require student survey participation during the last few days. If applicable, verify that you have the Exit Button configured to meet these best Practices.	Yes ☐	No ☐
Come Back Later Button: The best practice with the 'Come Back Later' button is to leave the default setting, which is disabled, especially if you have the 'Exit' button enabled. If you choose to use the 'Come Back Later' button rather than the 'Exit' Button the best practice would be to enable 'Hide Come Back Later' button 3-5 days before survey end date to require student survey participation during the last few days. If applicable, verify that you have the 'Come Back Later' configured to meet these best practices.	Yes ☐	No ☐

Project: Courses Tab		
LMS Re-Sync Courses ("Data Import" tab) has been completed before searching for courses (if applicable).	Yes ☐	No ☐
Desired courses have been imported correctly into the Project Courses grid.	Yes ☐	No ☐
Enrollments – you have verified that enrollment numbers are correct for courses.	Yes ☐	No ☐
If there are courses with multiple instructors, instructor-specific questions in the survey are enabled for Team Taught configuration.	Yes ☐	No ☐
Review the Hierarchy Level in the Project Courses grid--all courses are mapped to the desired level.	Yes ☐	No ☐
Administrators are assigned to each hierarchy level where courses are mapped (Manage Administrators).	Yes ☐	No ☐
If course-level dates are being utilized for any courses in this project, they are correctly set up.	Yes ☐	No ☐
Project: Users Tab		
Enrollment refresh (Users Tab >> Data Import >> Your Institution's LMS) is set to refresh student enrollments at the beginning of the project (if applicable).	Yes ☐	No ☐
All users have valid email addresses.	Yes ☐	No ☐
Project: Surveys Tab		
Verify that you have chosen the correct survey as the Main Survey by clicking "Select a Survey," clicking on the check mark and "Select Survey."	Yes ☐	No ☐
If Targeted Surveys are being used, you have verified that they've been assigned to the correct courses or hierarchy levels.	Yes ☐	No ☐
Project: Communications Tab		
All of the communication dates are set correctly to correspond with the start/end dates of the project or courses (if course-level dates are used in the Project).	Yes ☐	No ☐
The Login URL placeholder has been added to email message text to allow students to directly access their surveys via email.	Yes ☐	No ☐
Non-respondent emails are being utilized to help drive response rates.	Yes ☐	No ☐
Project: Report Setup Tab		
Reporting Access is enabled, and dates set for Administrators.	Yes ☐	No ☐
Reporting Access is enabled, and dates set for Instructors.	Yes ☐	No ☐
If applicable, Benchmarks are set up under Benchmark Data to allow comparisons of course data to hierarchy levels in account (e.g., department, school, etc).	Yes ☐	No ☐
If applicable, Mean of Means have been created for any groups of survey questions you want automatically averaged on reports.	Yes ☐	No ☐