



Kemp's Case Works, Inc.

Client Satisfaction Survey

Prime 16 utilizes technologies made available through Venture Technologies and provides you with the ability to send your clients Client Satisfaction Surveys. This new survey feature is very easy to use in Prime.

The Client Satisfaction Survey system will send a client an email after their case is closed. If the client does not fill out the survey, the system will send two reminder emails asking the client to fill out the survey.

Setup the system using the five, simple tabs in the Client Web Satisfaction Setup screen. On the "Website Settings" tab, enter the base address of the website for your survey system. Determine the closing date for which you want to start sending emails. For example, if you start using the system on October 1, 2016, you may not want to send client surveys for cases that were closed in 2015. If you wanted to send surveys on cases closed after June 1, 2016, then you would enter "6/1/2016" in the closing date box. Finally, enter the number of days to wait after closing before sending the survey. This allows you some leeway in the event staff close a case and decide three days later to reopen it.

Website Settings	Email Setup	Email Body	First Reminder	Second Reminder
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Survey System Web Address:

The system uses this web address to create the ultimate link for the client survey.
This information will be provided by your IT staff/website provider.

Each survey email is unique, using a unique ID assigned to the client's case.
The ultimate link provided to the client will look something like this:
<https://svlas.kempscaseworks.com/clientsurvey?UUID=93gj3-f383jf-sdivj>

It is put together using the web address above and adding the "?UUID" variable.

With what closing date do you wish to begin sending survey emails:

(e.g., if you enter 10/1/2016, only cases closed after that will receive surveys)

How soon after closure do you want the email to be sent?

(E.g., if you enter 5, the system will wait at least 5 days before sending the survey):

On the Email Setup tab, enter your organization's SMTP settings to be used for sending email.

Website Settings | **Email Setup** | Email Body | First Reminder | Second Reminder

Sending Email Server Address

Sending Email Server Port

Sending Email Security (TLSorSSLorNONE)

Sending Email Address Username

Sending Email Address Password

On the third tab, the “Email Body” tab, enter the body of the email to be send to the client. Keep in mind that the system automatically adds the link the client will click to start the survey. That link follows the entry you make here.

Website Settings | Email Setup | **Email Body** | First Reminder | Second Reminder

Body of Email (You may use HTML here):

At the end of the email body is the link the client can click to start the survey. The link is not modifiable. The final email body will look like this:

<EMAIL BODY - entered above>

Please click <LINK> to access the survey.

If that link doesn't work, please copy and paste this URL in your browser address box:

<URL>

On the fourth tab, the “First Reminder” tab, enter the number of weeks you want to wait after the first email is sent before sending a reminder to the client asking them to fill out the survey. Obviously, a reminder is not sent if the client filled out the survey. Enter the

reminder text you want in the email. The reminder will include the body from the first email.

Website Settings	Email Setup	Email Body	First Reminder	Second Reminder
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After the first email is sent, if the person doesn't answer the survey, how many weeks should the system wait before sending a reminder email?

This is figured in weeks from the date the original email is sent. So, if the first email was sent on 9/1/2016, and this is set to 1 week, the earliest the first reminder email would be sent is 9/8/2016.

What text should the first reminder have? (The reminder will also include the original email body below this text)

We sent a survey request earlier. We wanted to remind you about that survey and ask that you please complete it for us. It would really help us out.

On the final tab, the “Second Reminder” tab, enter the number of weeks to wait from the first reminder before sending a second reminder to the client. Again, a second reminder is not sent if the client filled out the survey. Also enter the text you want put in the second reminder email.

Website Settings	Email Setup	Email Body	First Reminder	Second Reminder
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After the first reminder email, if the person doesn't answer the survey, how many weeks should the system wait before sending a second reminder?

This is figured in weeks from the date the first reminder email is sent. So, if the first email was sent on 9/1/2016, and the first reminder email was sent on 9/8/2016. This is figured from the 9/8/2016 date. So if this was set to 2 weeks, the earliest the second reminder email could be sent would be 9/22/2016.

What text should the second reminder have? (The reminder will also include the original body)

We've already sent a reminder about our survey before. We just noticed you hadn't completed the survey. We hope you will do so to help us out. We won't send additional emails after this one. Thanks!

You can set up the system for testing, using the “Test System” tab in the setup screen. Check the checkbox to set the system to test mode. In this mode, the system will not send emails to anyone except in the test case entered. The details of that case don’t matter—case type, closure, etc.—rather, it only needs an appropriate email address entered in it.

Website Settings | Email Setup | Email Body | First Reminder | Second Reminder | **Test System**

Set the system to run in test mode

Case number to send test email to:

When set to test mode, the system will not send email regarding any case except this one. Make sure the case has an appropriate email address. The system also will not make all associated entries for the Client Web Satisfaction special program.

The email is sent to that case's email address regardless of all other settings of the case (regardless of case type, whether closed, or any other factors).

[Trigger Test Run](#)

Click the “Trigger Test Run” to manually trigger the system to send emails. If the system is in test mode, it will send an email to the email address in the test case.

The survey, when completed, shows up in the client’s case, in Special Programs:


Do Not Send Satisfaction Email <input type="checkbox"/>		Logs
Sent 1:	<input type="text" value="7/19/2016 9:37:30 AM"/>	Sent 2: <input type="text"/>
Sent 3:	<input type="text"/>	
Response:	<input type="text"/>	
Rating Of Advocate	<input type="text"/>	1=Terrible <-> 5=Excellent
Advocate Responsive To Contact	<input type="text"/>	1=Not Responsive <-> 5=Very Responsive
Case Handled Quickly	<input type="text"/>	1=Strongly Disagree <-> 5=Strongly Agree
Expectations Met	<input type="text"/>	1=Strongly Disagree <-> 5=Strongly Agree
Recommend To Friends/Family	<input type="text"/>	1=Strongly Disagree <-> 5=Strongly Agree
Overall Rating	<input type="text"/>	1=Terrible <-> 5=Excellent
Note	<input type="text"/>	

If, upon closing, or at the client's request, you do not want survey emails sent to the client, simply check the "Do Not Send Satisfaction Email" checkbox. The system will not send a survey for this case.

The "Sent 1", "Sent 2", and "Sent 3" boxes show the dates and time that emails were sent to the client in this case. If the client has filled out the survey, the "Response" box will show the date and time the client completed the survey.

The rating boxes show the answer to the questions presented to the client, together with any notes the client made in the survey.

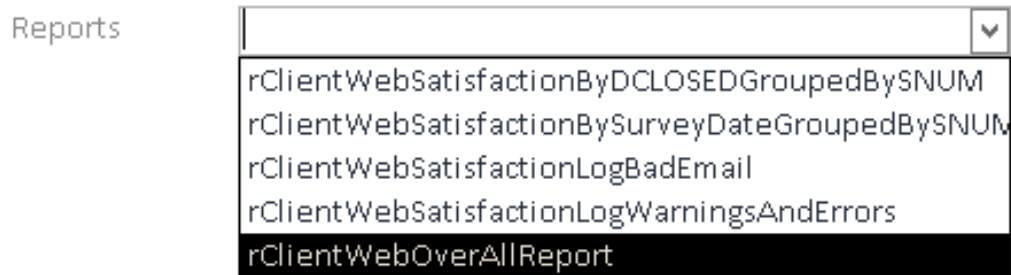
Clicking the "Logs" button will show any log entries the survey system made for this case. The survey system makes several entries and will note if it ran into problems in attempting to send an email to the client:

Client Web Satisfaction Log Close		
Date:	Error Level:	Message:
9/19/2016 9:34:16 AM	 Info	Starting sequence to send first email for case.
9/19/2016 9:34:16 AM	Info	Opening database connection in CreateNewClientSatisfactionEntry().
9/19/2016 9:34:16 AM	Info	Executing query to create survey entry in CreateNewClientSatisfactionEntry().
9/19/2016 9:34:16 AM	Info	CreateNewClientSatisfactionEntry() Execution complete.
9/19/2016 9:34:16 AM	Info	Opening database connection in GetClientSatisfactionUUID().
9/19/2016 9:34:16 AM	Info	Executing query to get UUID entry in GetClientSatisfactionUUID().
9/19/2016 9:34:16 AM	Info	Getting UUID from entry
9/19/2016 9:34:16 AM	Info	Attempting to send survey email
9/19/2016 9:34:16 AM	Info	Survey email sent.

The system uses technology available on Venture to automate the process of sending emails to clients whose cases have closed.

Reports

There are a few reports to get survey answers from the system:



rClientWebSatisfactionByDCLOSEDGroupedBySNUM – a report that provides information grouped by staff number (together with averages) for cases that were closed within a specified range:

Client Web Satisfaction by SNUM

Case Date closed between 1/1/2010 and 1/1/2020

Ratings are from 1 to 5 - the higher, the better

Survey Date	Advocate	Responsiveness	Handled Quick	Expectations Met	Recommend to Others	Overall	Case
Staff: 1000							
11/10/2015	5	4	3	2	1	5	15E-1000514
1/1/2016	1	2	3	4	5	4	02-1000218
Staff average	3	3	3	3	3	4.5	

rClientWebSatisfactionBySurveyDateGroupedBySNUM – a report that provides information grouped by staff number (together with averages) for surveys that were entered within a specified range:

Client Web Satisfaction by SNUM

Survey Date between 1/1/2016 and 12/31/2016

Ratings are from 1 to 5 - the higher, the better

Survey Date	Advocate	Responsiveness	Handled Quick	Expectations Met	Recommend to Others	Overall	Case
Staff: 1000							
1/1/2016	1	2	3	4	5	4	02-1000218
Staff average	1	2	3	4	5	4	

rClientWebSatisfactionLogBadEmail – a log report of instances where the system has detected a bad email address entered in a case in which the system would otherwise have tried to send an email; log is run by when the email was attempted within a specified range:

Client Web Satisfaction Log Bad Email

Monday, December 05, 2016

2:57:21 PM

Period: 1/1/2010-12/31/2016

DateAndTime CASENUM

9/19/2016 9:43:02 AM	james
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rClientWebSatisfactionLogWarningsAndErrors – a report of warning and error messages indicating the survey system attempted to perform an action and entered a problem doing so; this shows those log entries within a specified date range:

Client Web Satisfaction Warnings and Errors

Monday, December 05, 2016

2:58:59 PM

Period: 1/1/2010-12/31/2016

Date And Time	CASENUM	Error Level	Message
9/16/2016 8:25:06 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:25:48 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:24:30 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:25:12 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:25:22 AM		Error	System is disabled in setup. Not continuing.
9/16/2016 8:25:54 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:25:36 AM		Error	Email was not sent to support people: Failure sending mail.
9/16/2016 8:27:18 AM		Error	Email was not sent to support people: Failure sending mail.

rClientWebSatisfactionOverAllReport – a report showing an overview of the cases closed, emails sent, and survey completed within a specific date closed range:

Survey System Breakout

Statistics for cases closed between:

Total cases (S and P) closed during period:

Of those cases, emails were sent to:

Of those, surveys were completed by: