


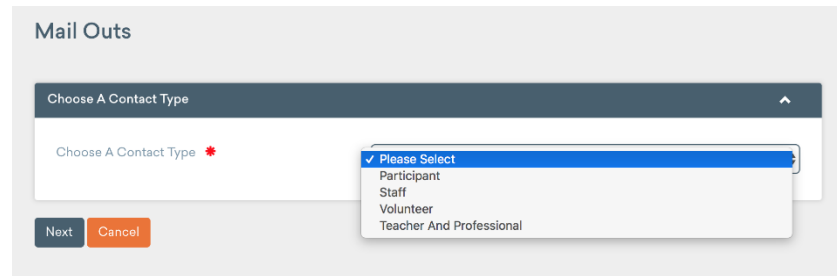
How to use the Questionnaire Mail Out tool

The Mail Out tool enables users to email Questionnaires to their Contacts to complete online. Users can then monitor responses to the questionnaire and re-send to Contacts who have not responded.

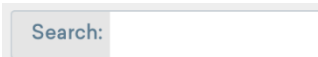
To create a mail out for a questionnaire:


- Hover over **Evidence** and select **Questionnaires**
- Click on the **Mail Out** icon to the right of the relevant questionnaire 

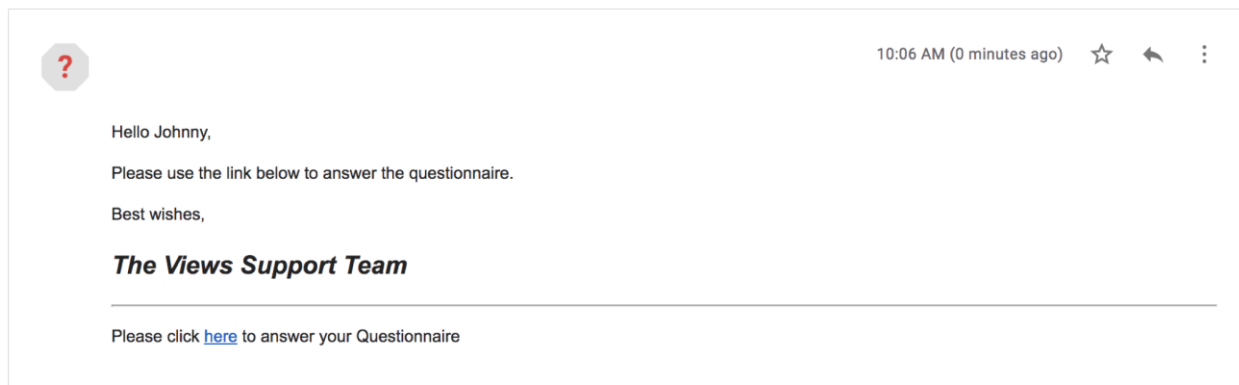
- Choose the **Contact Type** that you wish to send the questionnaire to
- Click **Next**



The screenshot shows a 'Mail Outs' form. At the top, it says 'Choose A Contact Type'. Below this is a dropdown menu with a red asterisk next to the text 'Choose A Contact Type'. The dropdown menu is open, showing a list of options: 'Please Select' (with a checkmark), 'Participant', 'Staff', 'Volunteer', and 'Teacher And Professional'. At the bottom of the form, there are two buttons: 'Next' and 'Cancel'.

- A list of all contact records of that type (e.g. 'Participants') with a valid email address will be displayed. In the **Send Email** column on the right, you can select which records to send the link to
- To search for specific records to send to, enter a search term in the search bar 


- Alternatively, select the **Magnifying Glass** icon to perform an advanced or statistical search 
- After selecting the relevant contacts, click **Next**
- Compose the email or choose a correspondence template* from the list and then click **Send**
- Each recipient will receive an email with a link to answer the questionnaire



- Clicking on the link will take the person to an online version of the form, which they can then complete and submit. The completed form will be stored in the **Questionnaires** section of the Contact's record on Views

* For information on creating correspondence templates, see the support document **How to Create a Correspondence Template**, available online at <https://www.substance.net/wp-content/uploads/How-to-create-a-correspondence-template.pdf>

To monitor responses to a questionnaire:

- Hover over **Evidence** and select **Questionnaires**
- Click on the name of the relevant questionnaire
- Select **Mail Outs** from the tabs on the left-hand side
- A list of the contacts that have received the mail out but have not responded will be listed, along with the date that the mail out was sent and the user that sent this
- To re-send an email to a contact, select the **Envelope** icon  the right of their record and then click **Ok**
- To view a list of Contacts that have responded to the link, select the **Answered** tab

