Survey Central
EXTERNAL USER GUIDE

Federal Reserve System
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I. Overview

Survey Central is a web-based reporting application developed by the Federal Reserve to provide a secure, single point of entry for Federal Reserve electronic survey submissions.

There are two methods of accessing surveys in Survey Central: through the portal or through email invitation. The method of submission is determined by the survey itself and cannot be changed. Your Reserve Bank Analyst will provide guidance on your institution’s submission method based on the survey. In order to use the Survey Central Portal, the external user or reporting entity will have to request access for specific surveys that are submitted in the application portal and will be issued an account that will enable multi-factor authentication. There are a few steps that need to be completed by each reporting entity prior to being issued an account. More information about this process (and the overall setup process) can be found on the Survey Central Resources page or in Step 2 - Setting up Multi-Factor Authentication:
II. Setting Up Multi-Factor Authentication for Survey Central Portal

Some surveys will only be accessible through the Survey Central portal. Those surveys that are accessed through the Survey Central portal require the creation of an account or profile for the purposes of multi-factor authentication. Respondents must be invited to join any survey conducted by the Federal Reserve, and participation may be subject to approval prior to access provisioning.

To create a profile for multi-factor authentication, please provide your Survey Central Technical Support Contact with the following information for each profile:

- First and Last name of the user
- Business email address of the user
- Name of the Application (Survey Central)

See our Privacy Policy for information on how we use the submitted information.

Once the profile has been created by the technical support team, you will receive an email activation link to finish setting up your multi-factor authentication profile. Clicking the “Activate Account” button within the email will allow you to finish setting up a password and other security features as shown below.
Within the link, you can adjust your profile settings to include a phone number to receive your multi-factor authentication code via text message instead of through email.

Once the profile is set up, the next time you logon to the Survey Central portal you will be prompted to send the multi-factor authentication code to your preferred delivery method.
III. Accessing and Logging into Survey Central Portal

The Survey Central application portal can be accessed on FRBservices.org. The user clicks on “Survey Central Secure Logon” button to start the login process.

A warning message will appear asking whether the user is authorized to use the Survey Central application. If so, the user should click on the “I Agree” button.
The user will be taken to the Survey Central Portal where the user can view all the surveys that he/she is authorized to complete. Once the user clicks on a survey, he/she will be prompted to start the multi-factor authorization process.

A window will appear asking the user to enter his/her username and password. The email address is the one provided in the Setting Up Multi-Factor Authentication step.
After the username and password have been provided, another window will appear asking the user to enter his/her two-step verification code. The code can be obtained either through an email or text message. Where the code is sent depends on how the account settings are configured by the user (see: Setting up Multi-Factor Authentication). Once the code is verified, the user can begin the survey.
IV. Survey Central Portal

The Survey Central Portal appears once the external user logs into Survey Central. Multiple functionalities are displayed on this page.

The user can:
• Verify the reporting statuses of surveys
• Enter and view responses

The home screen is where each of the reporting entity’s surveys that are submitted via the Survey Central Portal will be displayed. Below is an example of the available information on the Portal.

1. Active/In Progress Survey
2. Survey Open and End Dates for Active/In Progress Surveys
3. Completed Survey and historical submissions

Clicking on a survey will take you to the data entry section for that specific survey. More information on how to navigate and complete surveys can be found below in Survey Workflow.
V. Accessing Surveys Through Email

Some surveys will not require logging into Survey Central and can be accessed via a link distributed through email. If someone at your institution requires the link to a survey, he/she can ask a Survey Central Technical Support Contact for assistance.

Please be on the lookout for an email that contains the link for the survey you are authorized to participate in. The email will be distributed through a trusted contact such as your institution’s Survey Central contact or Survey Central Technical Support Contact. To ensure you have the correct link, verify that the name of the survey is referenced in the body or subject of the email.

If anyone at your institution has difficulties obtaining the email or accessing the survey link, please reach out to the Survey Central Technical Support Contact for assistance.
VI. Survey Workflow

Regardless if you access a survey through the Survey Portal or through an email link, the interface of the survey will be the same. This section will be dedicated to explaining how to navigate a survey in the application, different parts of the survey interface, and common types of questions that may be encountered during survey submissions.

Navigating a Survey

Upon opening a survey, users will be brought to either the Table of Contents (if applicable, [Figure 1]) or the first question (Figure 2). Users can navigate between questions by either clicking on the arrows on the bottom of the page or by clicking a specific section within the Table of Contents (if applicable).

Figure 1: Table of Contents

![Figure 1: Table of Contents](image)

Figure 2: First Question layout without Table of Contents

![Figure 2: First Question layout without Table of Contents](image)
Survey Interface and Questions

The following screenshots will explain the interface of the survey application and typical question types that users may be asked for survey collections.

1. Progression Bar – shows the current completed progress of the survey
2. Single Answer Choice Questions – Only one answer may be selected
3. Multiple Answer Choice Questions – One or many answers may be selected
4. Dropdown List Choice Questions – Only one answer may be selected
5. Select Box Questions – Could be single or multiple choice depending on the question
6. Navigation Buttons – Navigate to the other pages or sections within the survey
7. Matrix Type Questions – Only one answer may be selected
8. Rank Order Matrix Type Questions – Rank each answer for each option
9. Rank Order – Only one rank may be selected per choice
10. Text Entry Type Question – Free form text box that allows answers to be typed
Note: Questions may be required to be completed depending on the survey. If an invalid response is submitted or a question is not completed when navigating to a new page, a validation error (examples below) will trigger. Please revise your responses before continuing with the survey.

**Please assign a value from 1 to 3 for each item. Values may not be repeated.**

**Please limit the response to 500 characters.**

Saving and Submitting a Survey

Survey responses are saved automatically at regular intervals, and every time a user switches to a new page. Users are notified that a specific section of a survey is complete, and if all questions answered there is a checkmark next to the section in the Table of Contents.
Users are asked to confirm if they are ready to complete the survey before the submission is considered final. Clicking the next button will submit the survey, otherwise clicking the back button will allow users to revise their responses.

Once the Submit Survey button has been clicked, the survey will be considered completed and responses final. A confirmation message will appear stating that responses have been recorded and a summary of those response will be listed. A PDF of those responses can be saved by clicking the appropriate link.
VII. Survey Central Contacts

- Survey Central Technical Support Contact
  (Authorization, Password assistance and Survey Central set up)

FRB NY SYS Federal Reserve Surveys Unit:

- federalreserve.surveys@ny.frb.org
- (212) 720-6226