

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

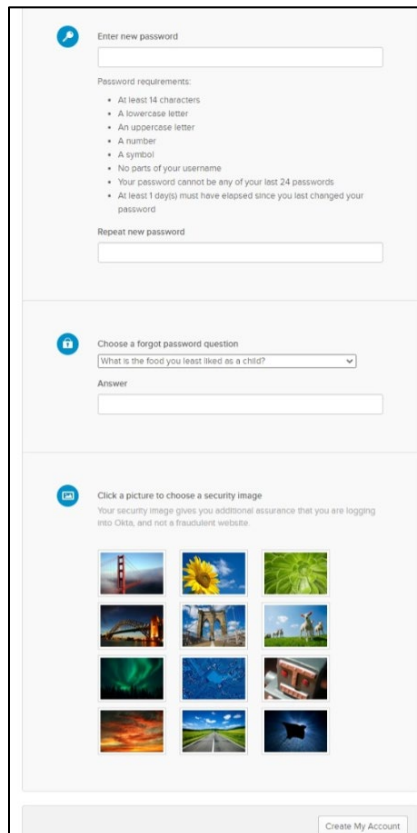
Some surveys will only be accessible through the Survey Central portal. Those surveys that are accessed through the Survey Central portal require the creation of an account or profile for the purposes of multi-factor authentication. Respondents must be invited to join any survey conducted by the Federal 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.

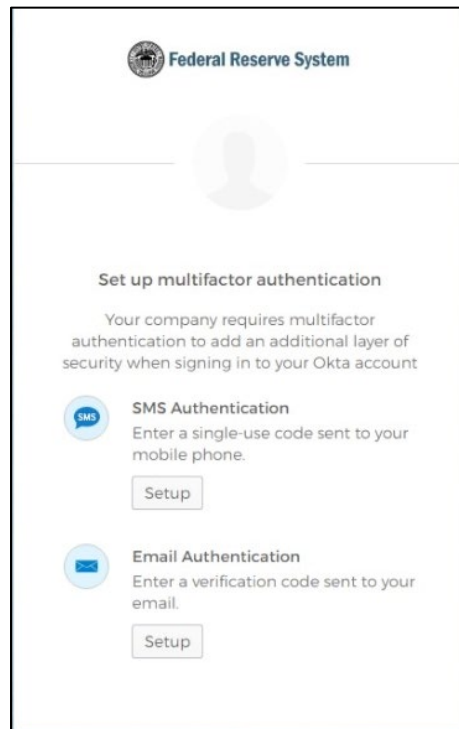


The screenshot displays a three-step account creation process:

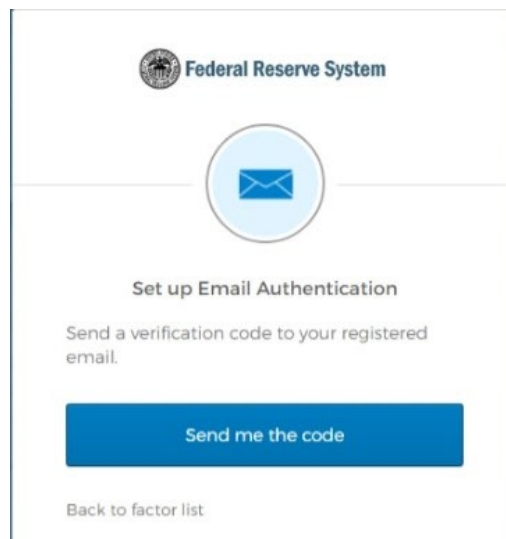
- Step 1: Enter new password**
 - Input field for the new password.
 - Password requirements:**
 - At least 14 characters
 - A lowercase letter
 - An uppercase letter
 - A number
 - A symbol
 - No parts of your username
 - Your password cannot be any of your last 24 passwords
 - At least 1 day(s) must have elapsed since you last changed your password
 - Input field to repeat the new password.
- Step 2: Choose a forgot password question**
 - Dropdown menu with the question: "What is the food you least liked as a child?"
 - Input field for the answer.
- Step 3: Click a picture to choose a security image**
 - Text: "Your security image gives you additional assurance that you are logging into OMS, and not a fraudulent website."
 - A 4x3 grid of 12 different images for selection.

A "Create My Account" button is located at the bottom right of the form.

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.

Reporting Central

The Federal Reserve uses reporting forms to collect data from bank holding companies, depository institutions, other financial and nonfinancial entities and consumers. Submission of the forms is required in some cases, voluntary in others. Some data are collected frequently, others only occasionally. The information gathered by these reports aids the Federal Reserve in carrying out its responsibilities for the conduct of monetary policy, the supervision and regulation of the banking industry and the protection of consumers' rights.

REPORTING CENTRAL LOGON

Reporting Central provides financial institutions with information about our electronic reporting application, report forms, instructions and relevant documents needed for preparing and filing regulatory and financial reports.

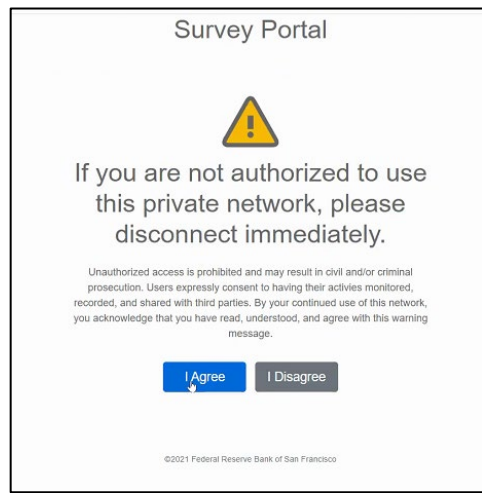
SECURE LOGON

SURVEY CENTRAL SECURE LOGON

Survey Central provides consumers, financial institutions and non-financial entities with information about our electronic survey application and relevant documents needed for preparing and completing surveys.

SECURE LOGON

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.

Survey Portal

Survey Dashboard

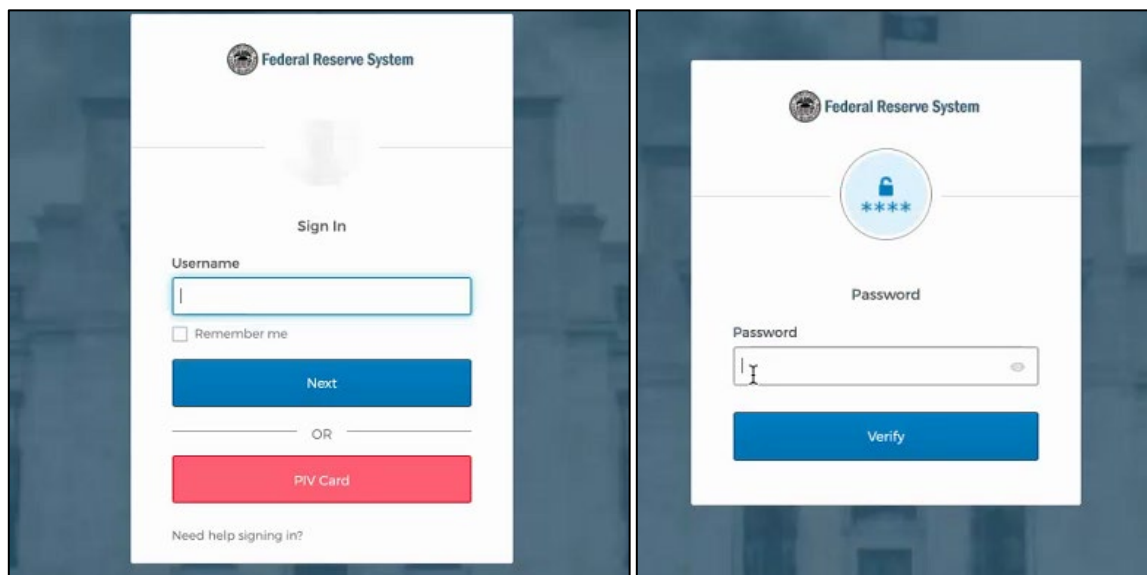
New/In Progress Surveys

Survey Name	Survey Open Date	Survey End Date
Domestic Test	03/11/2021 23:00:00	02/27/2022 23:00:00
Foreign - 2021-04 Restricted FR	04/07/2021 23:00:00	05/07/2021 23:00:00

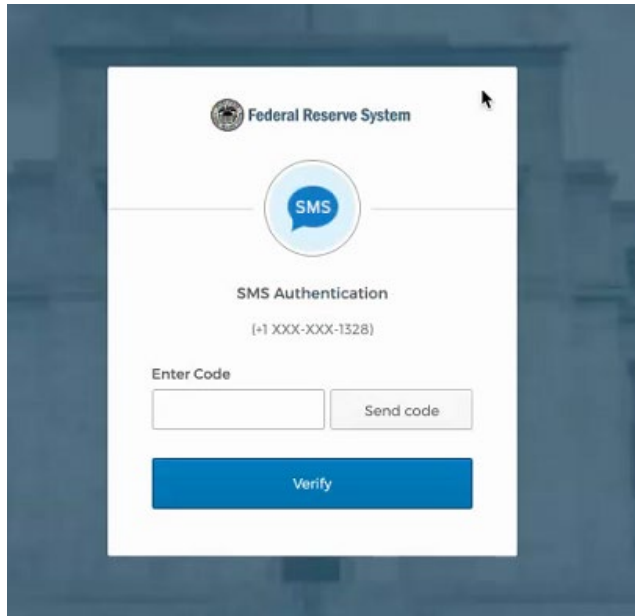
Completed Surveys

Survey Name	Survey Completed Date
Domestic Test	04/14/2021 09:59:11
Domestic Test	04/13/2021 08:39:17
Domestic Test	03/23/2021 15:31:10
Domestic Test	03/10/2021 13:15:36
Foreign - 2021-04 Restricted FR	04/14/2021 10:17:43
Foreign - 2021-04 Restricted FR	04/08/2021 16:38:27

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.

The screenshot shows the 'Survey Portal' dashboard. It features two main sections: 'New/In Progress Surveys' and 'Completed Surveys'. The 'New/In Progress Surveys' section contains a table with three columns: 'Survey Name', 'Survey Open Date', and 'Survey End Date'. The 'Completed Surveys' section contains a table with two columns: 'Survey Name' and 'Survey Completed Date'. Red circles with numbers 1, 2, and 3 are overlaid on the image to highlight specific elements: 1 points to the 'Survey Name' column header, 2 points to the 'Survey Open Date' column header, and 3 points to the 'Survey Name' column header in the 'Completed Surveys' section.

New/In Progress Surveys		
Survey Name	Survey Open Date	Survey End Date
Foreign - 2021-04 Restricted FR	04/07/2021 23:00:00	05/07/2021 23:00:00

Completed Surveys	
Survey Name	Survey Completed Date
Foreign - 2021-04 Restricted FR	04/14/2021 13:10:05
Foreign - 2021-04 Restricted FR	04/09/2021 17:30:04

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

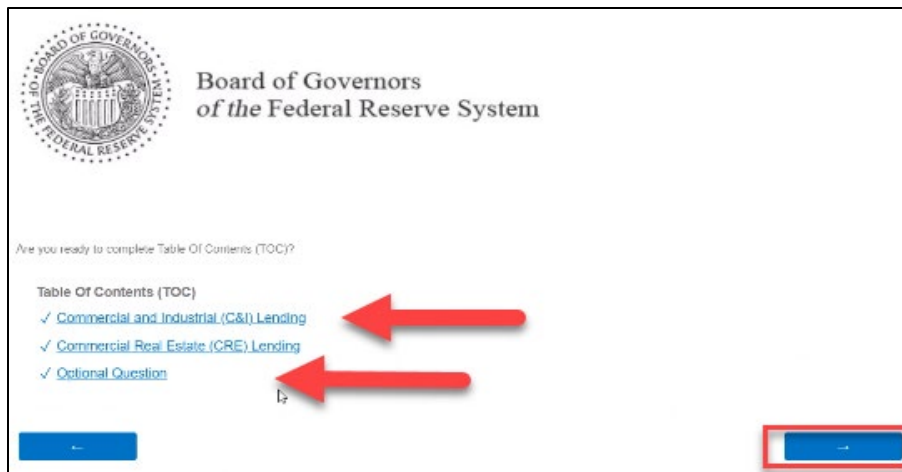
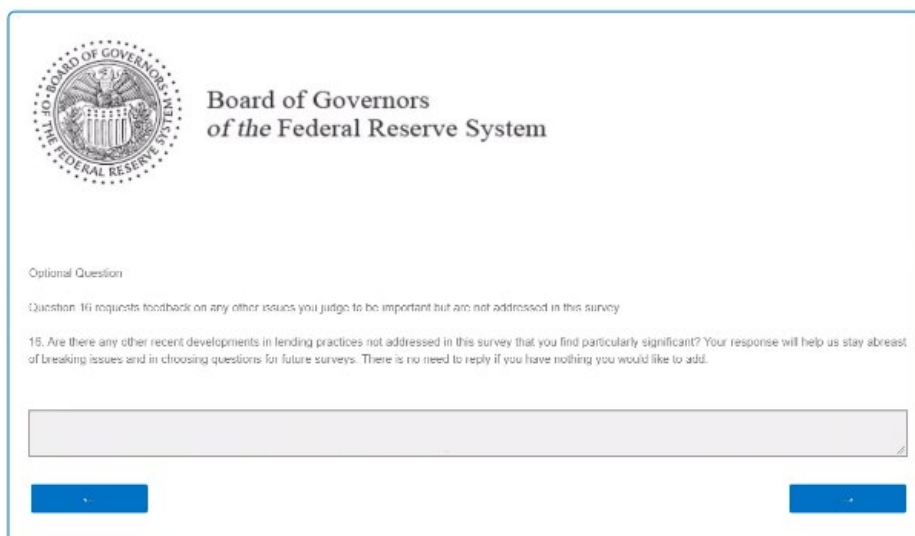
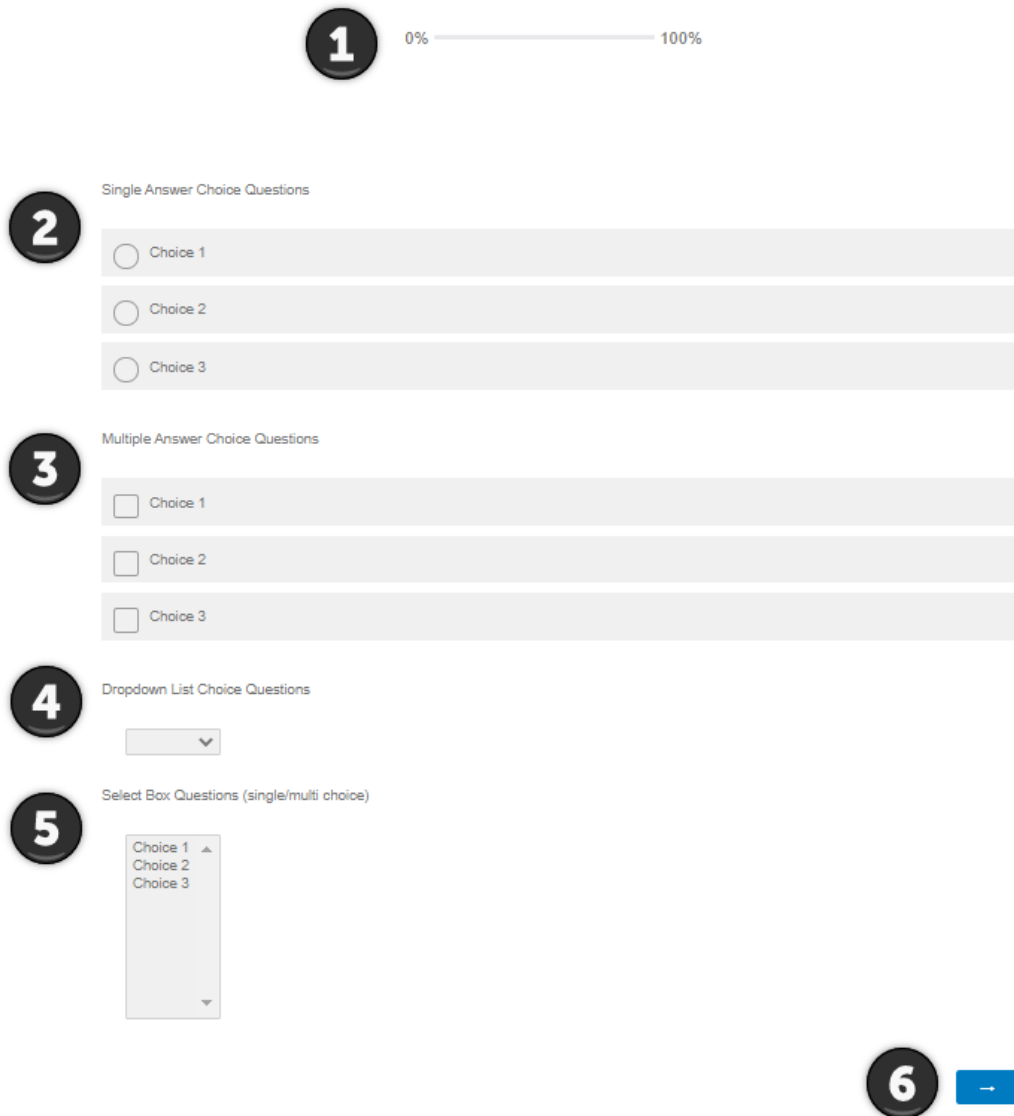


Figure 2: First Question layout without Table of Contents



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

Matrix Type Questions

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	Click to write Scale Point 1	Click to write Scale Point 2	Click to write Scale Point 3
Statement 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statement 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rank Order Matrix Type Questions

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	First	Second	Third
Statement 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Statement 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Statement 3	<input type="text"/>	<input type="text"/>	<input type="text"/>

Rank Order

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	1	2	3
Item 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Item 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Item 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Text Entry Type Questions

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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.

The screenshot displays two validation error messages in red boxes:

- Rank Order Matrix Type Questions:** A message stating "Please assign a value from 1 to 3 for each item. Values may not be repeated." Below this, a table shows three statements with empty input boxes for ranking. The columns are labeled "First", "Second", and "Third".
- Text Entry Type Questions:** A message stating "Please limit the response to 500 characters." Below this is a large, empty text input field.

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.

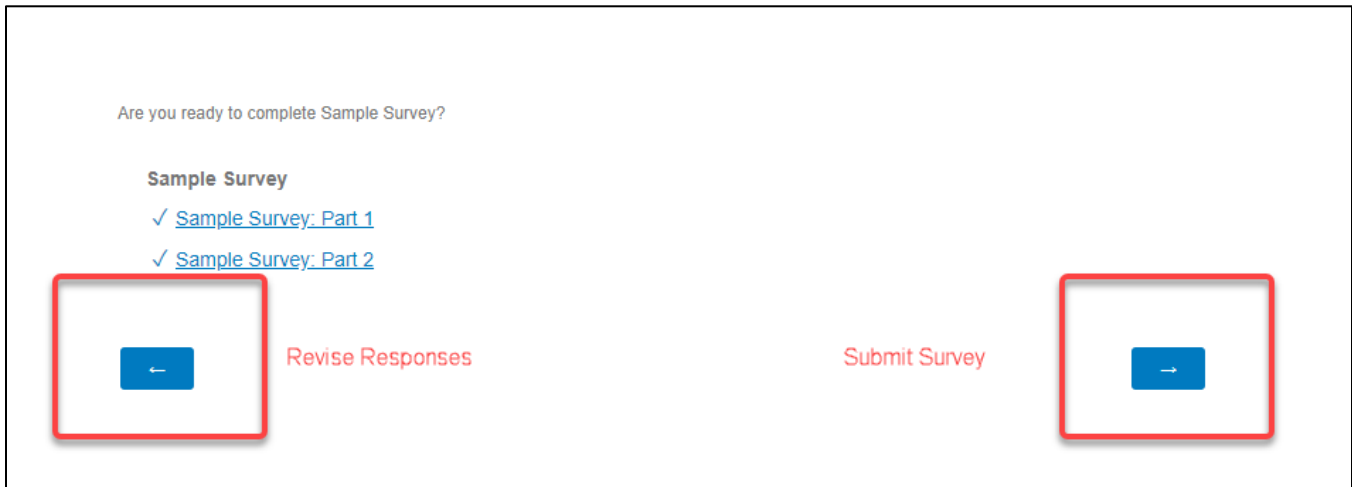
The screenshot shows a survey interface with a sidebar on the left containing a "Table of Contents" menu. The menu items are:

- Sample Survey
- ✓ Sample Survey: Part 1 (checked)
- Sample Survey: Part 2 (highlighted in blue)

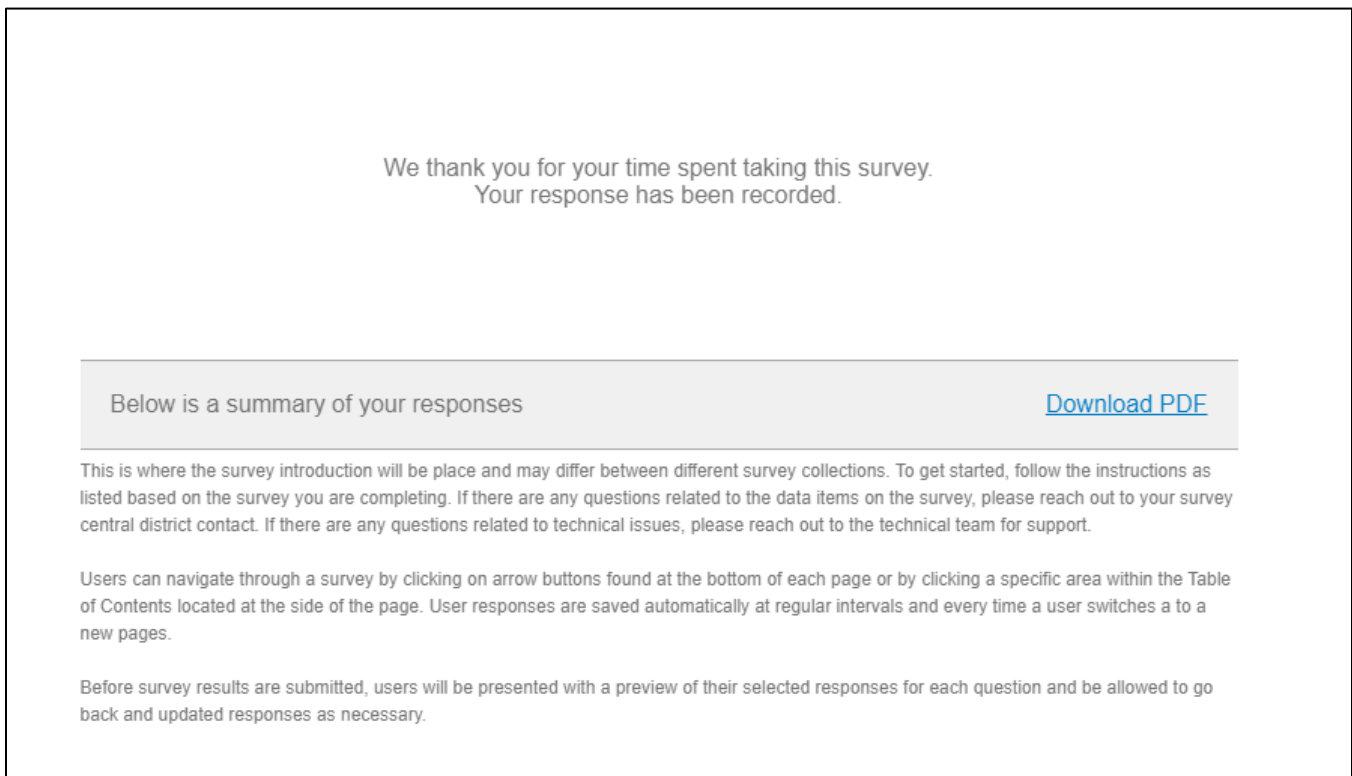
The main content area shows two question types:

- Matrix Type Questions:** Three statements with two radio button options each. The options are labeled "Click to write Scale Point 1" and "Click to write Scale Point 2".
- Rank Order Matrix Type Questions:** Three statements with two input boxes each. The boxes are labeled "First" and "Second".

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