



CONNECT Survey - Navigator Instructions

Instructions for telling clients about the CONNECT survey

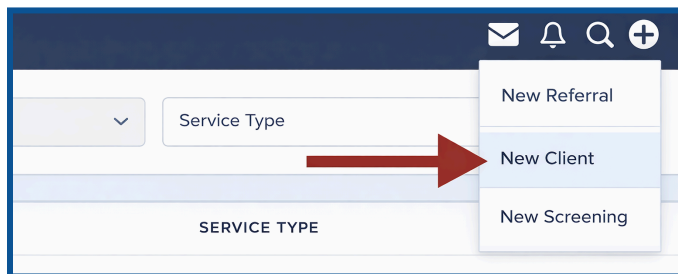
Purpose

UNM is helping **Santa Fe CONNECT** conduct a survey of individuals who are receiving services or resources from CONNECT for the first time. The intent of the survey is to get more information about **the experiences** these individuals are having with CONNECT.

Eligibility

Individuals who **do not currently** have a client record in Unite Us **are eligible to participate in this survey**. To identify whether the person you are working with has a client face sheet in **Unite Us**:

1. Click on the plus sign → select **New Client**



2. Enter **first name, last name and date of birth** of the individual. Be sure to use the name on the individual's driver's license or identification card.

The screenshot shows a 'Create Client' form with two tabs: '1 Search Records' and '2 Contact Information'. The '2 Contact Information' tab is active. The form contains the following fields:

- FIRST NAME ***: Jane
- LAST NAME ***: Doe
- DATE OF BIRTH ***: 05/03/1982

A note above the fields states: "If your client has an existing record, we can use it to expedite the creation process." A legend indicates that an asterisk (*) indicates a required field.



3. If the **Create Client** page pops up, this person is new to CONNECT and is **eligible** to participate in the survey.

4. After creating a new profile for this individual and providing navigation services, read the individual the [Offer Script](#).

5. If the individual agrees to take the survey, read them the [Survey Script](#).

6. Record information about whether the individual agreed to take the survey, and (if so) their contact information in the [Navigator Log](#). If you enter this information, you will receive a **\$5 Walmart gift card** when you read the Offer Script to an eligible individual and a **\$5 Walmart gift card** when you read the Survey Script to an eligible individual who wants to take the survey.

7. If the individual chooses to take a paper survey, please give them a paper survey. They can complete the survey at your location and you can mail it, or they can complete the survey **within a week** from when their profile was created in Unite Us, and mail it **from any mailbox**.

Questions or need help? Contact the UNM team at email@connectsurvey.org or 505-398-7743.