Title Agents and Abstracters Operations Survey

This guide describes how to get started with the Online Survey Tool.

View the following pages for illustrated descriptions of how to enter data, view comparisons and run personalized, dynamic reports.

Company Information
- ▲ Profile
- ⟳ Staffing
- ⚠ Financials

Business Development
- ✓ Business Development

Title Services
- ⟳ Record Repositories
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- ✓ Title Orders and Services

Closing, Escrow, Post-Closing
- ⟳ Payment Methods
- ✓ Payment Methods Frequency
- ✓ Closing Ceremony
- ✓ Post-Closing

Regulatory Compliance
- ✓ Regulatory Compliance

Technology
- ⟳ Technology Infrastructure
- ✓ Technology in Use or Planned

Feedback
- ⟳ Beta Feedback

Key Performance Measures
- ● View My Results

All users will access the site from ALTA's website.

For information, support and questions regarding the survey, visit the **Support** Page
or contact support at: research@alta.org

1. The survey is divided into 3 sections. "**My Company**" is where you will do all your data entry. When results are available, they will be accessed through the "**Compare Companies"** and "**Reports & Charts"** tabs.

2. Status icons next to each subcategory indicate your progress and warn you when you have missed a required question or when you have a numeric value outside of the expected range.

3. Your overall survey progress can be tracked through the progress bar & messaging at the bottom of the page.

4. Use the **Support** link to access support documentation and contact information.

5. If you have access to multiple accounts use the dropdown at the top left to switch between accounts.

6. Download all the questions in the survey, with or without your answers by clicking this icon on the home page. Once you are on a data entry page, you can export just that page, the entire section or all questions to share with others.

Entering Your Data

- As you enter data, the entry box turns green, indicating that new data has been provided and must be saved by clicking the **Save** or **Save & Next** button at the bottom of every page.

- To abandon or discard newly entered data, click **Cancel.**

- Any required questions are noted with a large, red asterisk *****.

- Some questions have the option of checking **n/a**, indicating that the question does not apply to you. Selecting **n/a** counts towards your overall survey progress.

- Some numeric questions are set with expected answer ranges. If you enter a value outside of the expected range, you will see a warning sign appear. You will be able to save this data, but it will be flagged as being out of the expected range.
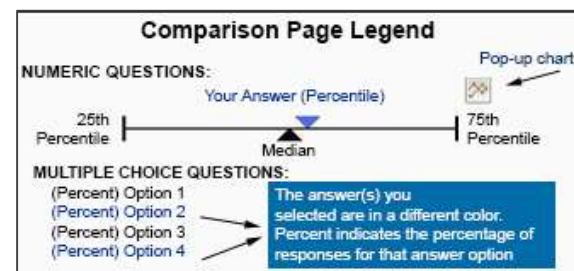
Accessing Results When Available

When released, results will be available once enough data has been collected –
Access to results is based on participation (or a purchase).

- Results are available in two formats – question by question comparisons and personal, dynamic reports.
    - **Question Comparisons**: Accessed from the 2nd tab on your home page, question by question comparisons allow you to see how you compare to other participants for every question in the survey.
    - **Reports**: Accessed from the 3rd tab on your home page, personalized, dynamic reports provide you with a collection or results information presented in either chart or table format.
- To ensure data anonymity, all results are aggregated and a minimum of 5 data points is required, even when filters are applied.
    - Numeric results are presented in quartiles, values that divide a list of numbers into quarters:
        - 25th Percentile/first quartile: 25% of the data fall below this percentile.
        - 50th Percentile/median: The median represents the middle number where 50% of answers are lower and 50% are higher.
        - 75th Percentile/third quartile: 75% of the data fall below this percentile.
    - Multiple Choice results are reported with the percentage of answers associated with each response option for that question.
    - Unless a chart is presenting multiple pieces of data (such as in a pie chart), your responses will be presented in a different color.

Compare Companies - Question by Question Comparisons

- From **Compare Companies** tab, click on any question group or sub-group to view your response compared to the **aggregate** results.

- Click on the icon to the right of each question to view the data in a chart, which can then be saved as either PDF or PPT.

Comparison Page Legend

NUMERIC QUESTIONS:
Your Answer (Percentile)
25th Percentile — Median — 75th Percentile
Pop-up chart

MULTIPLE CHOICE QUESTIONS:
(Percent) Option 1
(Percent) Option 2
(Percent) Option 3
(Percent) Option 4
The answer(s) you selected are in a different color. Percent indicates the percentage of responses for that answer option

Example

» Region
Indicate the region of your headquarters/primary offices.
West: AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY
Midwest: IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI
Northeast: CT, MA, ME, NH, NJ, NY, PA, RI
South: AL, AR, DC, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV

(17%) West
(21%) Midwest
(15%) Northeast
(46%) South

Example

» Gross Sales
Indicate gross sales in U.S. dollars for the year indicated above right, across all U.S. offices.

$8,012,500 — $22,350,560 (46th) / $26,000,000 — $72,654,991

Filters allow you to drill down and compare your answers to a subset of __aggregate__ respondents. All results continue to be aggregated with a minimum of 5 data points, even when filters are applied.

- Click **Edit** to activate the filters.

- **Numeric filters**: Click **Add** to activate sliders.

  Use slide bar to set a numeric range by moving the blue squares or enter a number in boxes.
- **Single-select filters (if available)**: Choose one answer from the drop down menu.
- **Multi-select filters (if available)**: Check the items you wish to include.
- **NOTE**: **Any** indicates that the filter is **NOT** applied. To include all accounts that answered the question, select the full range of data in a numeric filter and select check all answer options in a multiple choice filter.

- Watch the filter message change as you select filters. A warning message will display when you have filtered too far to return results.
- If your filters do not return enough responses, change your filter settings by:
  - Widening the range of a numeric filter.
  - Turning off a numeric filter by clicking the **X**.
  - Returning a multiple choice filter to **Any**.
  - Click **Clear** to start over and select different filter options.
- When you have the filter settings you desire, click **Done** to close the filter area.

- Once you have found a filter setting that works for you, save it as a filter favorite to easily use again.
- Filters will carry forward onto subsequent compare pages as well as the reports page, until they are cleared.

Personalized, Dynamic Reports

- From your reports tab, click on a report name to download your personalized report.

  - **PowerPoint** reports display data in charts and graphs, including year-over-year and multi-year trend charts.

  - **Excel** reports display data in spreadsheet format.

  - **Word** reports display data in tables with summary details.

- Use filters to get the most out of your results.

- Filters applied to question by question comparisons will carry forward into reports until they are cleared.
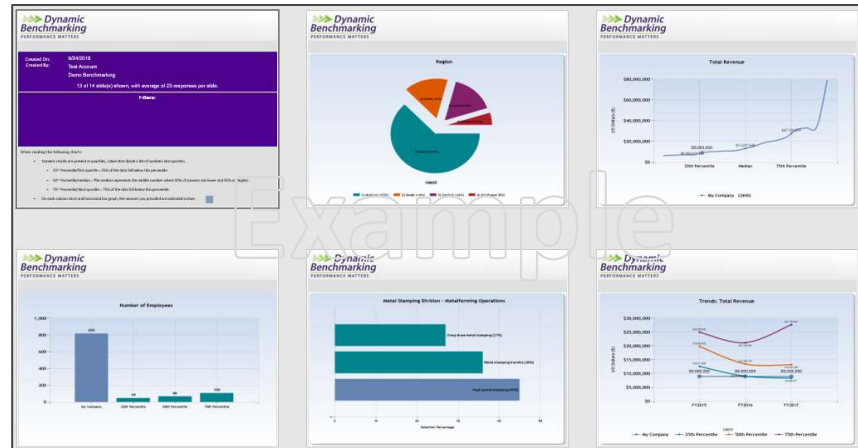
How Data is Displayed in Multi-Year Trend Charts – When Available

Trend chart reporting follows the minimum number of accounts and data points required by the platform to display results:

- Five (5) accounts must meet the filter criteria set for EACH trend year.

- Five (5) data points are required for EACH trend year.

In the example shown:
- The minimum number of accounts (5) was met to display the trend report.

- The minimum number of accounts (5) was NOT met for years FY2012 and FY2013. Therefore, no trend values/dots are shown for FY2012 or FY2013 on the chart.

- The minimum number of data points (5) WAS met for FY2014, FY2015 and FY2016, and trend values/dots are displayed for these years.

*If there is not enough data for a **specific year**, that year will not display a trend value/dot.*

If the first or last year do not have enough data points, then the trend line will not be drawn to that year.
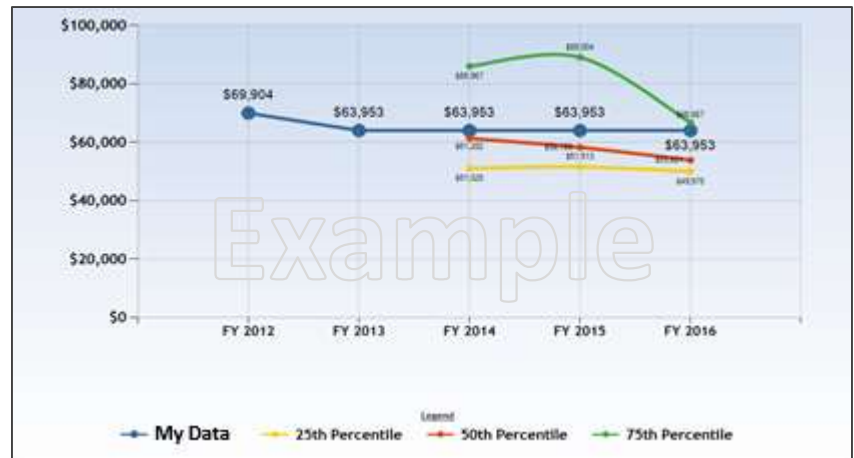
Managing Your Account

From the "My Account" page, you can: (link located at the top right of the screen)

- Review the Terms of Use, Privacy Policy, and Cookie Policy

General Help

All current browser versions are fully supported as follows (older versions of browsers may work but will not provide the best experience):

- Use the recommended browser settings for security and cookie settings. Cookies must be enabled to support the logging in process.

- Internet Explorer 11 - support for IE is going to be phased out when Windows 7 is no longer supported by Microsoft.

- Microsoft Edge – browser that comes with Windows 10.

- Chrome/Firefox/Safari – these browsers auto-update so the latest version should be used.