

Prefilling and Postfilling Survey Answers

Last Modified on 09/07/2021 1:03 pm CDT

In HRCenter admin, you can create surveys for applicants or employees to fill out. Surveys can be tests with correct answers, questionnaires, or even help populate a form(see [Mobile Forms](#)). In addition to being able to create questions, you can also have some data pre-populate or save to the employee's record in Enterprise or Beyond.

In this article

- [What are Prefilling and Postfilling?](#)
- [How to Setup Prefills and Postfills on your Survey](#)

What are Prefilling and Postfilling?

Prefilling in HRCenter Admin allows you to fill in a survey answer based on information on the employee's record. For example, if you asked the question on your survey: "What is your first name?" you could have the answer fill in with the employee first name that you have on file. This can help the survey process go faster when employees only need to review some information instead of entering it again.

Postfilling in HRCenter Admin allows your employees' answers to specific questions to automatically save on to the employee's record. For example, if you asked on your survey: "What is your date of birth?" you could have the answer that the employee provides save on their record under date of birth.

How to Setup Prefills and Postfills

In order to have information prepopulate or save to the employee's record, you will need to utilize the preset names in your questions on the survey and then enter the procedure names on the final page. If you've never created a survey before, check out [How to Create Surveys](#).

Note Prefilling and Postfilling only works with Textbox, TextArea, and Date Answer Types.

Using Prefill and Postfill Names

1. Navigate to the Survey question you want to pre or postfill
2. Under "Choose Custom Name" enter the prefill or postfill name

Question ✖

Please Enter Your First and Last Name

Field Mapping

Choose Pre-Defined Name: --None--

Choose Custom Name: Employee_FirstLast

Answer Type

TextBox

Is Question Required

Yes

Add Validation

3. Select the green Save button at the bottom of your survey

Default Prefill and Postfill Options

Below is a list of the prefill/postfill name options available.

Information Option	Prefill/Postfill Custom Name	Prefill	Postfill
Employer Name	Employer_Name	✓	
Employer Federal Employer ID (FEIN)	Employer_FEIN	✓	
Employer State ID	Employer_StateId	✓	
Employee ID	Employee_ID	✓	
Employee SSN	Employee_SSN	✓	✓
Employee First Name	Employee_FirstName	✓	✓
Employee Last Name	Employee_LastName	✓	✓
Employee Middle Name	Employee_MiddleName	✓	✓
Employee Birthdate	EEO_BirthDate	✓	✓
Employee First and Last Name	Employee_FirstLast	✓	
Employee Address Lines 1 & 2	Employee_Address12	✓	
Employee Address Line 1	Employee_Address	✓	✓
Employee Address Line 2	Employee_Address2	✓	✓
Employee City, State, and Zip	Employee_CityStateZip	✓	
Employee City	Employee_City	✓	✓
Employee State	Employee_State	✓	✓
Employee Zip Code	Employee_Zip	✓	✓
Employee Phone	Employee_Phone	✓	✓
Employee Email	Employee_Email	✓	✓

Where Information comes from:

Employer

Employer information is saved in Enterprise under All Options > Administration > Employer:

High Tech Staffing Inc
701 Main St.
Duluth MN, 55123

! Lunch Today ! Pay update confirm

Currently viewing 2 of 264442 tasks. View more...

tasks appointments social email

company information

Active

Name	High Tech Staffing Inc	Street	701 Main St.
Legal Name	High Tech Staffing Inc.	Street 2	
Web Public Name		City	Duluth
EINC	0	State	MN
Fed Employer ID	154645165	Zip	55123-____
Phone	555-555-5555	Country	United States of America

mailing address

Street	701 Main St.
Street 2	
City	Duluth

electronic w-2 file

BSO User ID	123654
Contact	Joe Johnson
Phone	555-555-5555

Employee

Employee information comes from the details tab on the employee's record:

EMPLOYEE James West (4295080490) / Details

James "Jay" West (4295080490)
SSN: 343-45-4354 · NEW YORK, NY 10001

VISIFILE DETAILS DOCUMENTS MESSAGES ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING MORE

Personal

Id	4295080490	Branch	Minneapolis
Full Name	James Jordan West	Nickname	Jay
Alternate Employee Id	--		

Identification

SSN	343-45-4354	Driver's License or ID Card Number	--
State	--	Expiration Date	--
Expiration date provided?	--	Class	--

Entering the Prefill and Postfill Procedures

Once you have entered the custom names on your survey, review it. When your survey is ready to be made into a page, you will need to add in the prefill/postfill procedures.

1. Navigate to the Pages tab on the left
2. Select + to add a new page
3. Enter the Survey Name and choose Survey

Create Page

Basic Settings

A page is where you decide how you want to present the information to your applicants. We support anything from html forms to survey question type pages.

Internal Name

Display Name

Primary Actor Type
For most pages this will be the employee (applicant).

Page Type

- Information**
Use a preset template to collect a set of information, such as personal info or work history. You can customize which questions are shown and required.
- Survey**
Use a custom question-and-answer formatted block. These need to be created on the Surveys page first.
- Form**
Use a premade form created in Form Builder or upload a HTML file. HTML files should be self-contained and include any necessary javascript, styling, etc. inside the file.

Step 1

4. Select Next
5. Choose your survey from the list and select next
6. Under Configuration Details, enter the Prefill or Postfill Procedures

Create Page

Configuration Details

Category
The category this block will belong to. Information blocks default to Info Blocks, Survey blocks default to Survey Blocks, Form blocks default to Form Blocks.

Document Type
Select a document type for this form.

Force Correct Answers
Forces the user to provide the correct answers to all multiple-choice questions on a quiz before moving forward.

Form Destination
PDF or None

Postfill Procedure
If a procedure other than the standard postfill procedure should be used, please enter it here.

Prefill Procedure
If a procedure other than the standard prefill procedure should be used, please enter it here.

Step 3

- Postfill procedure name = fx_HRC_Employee_Postfill_Default
- Prefill procedure name = fx_HRC_Employee_Prefill_Default

7. Select Next to review and save

Note Are you utilizing a Mobile Friendly Form? You can still utilize the Prefill and Postfill options but instead of choosing survey, you will choose to create a form page and enter the same procedure names listed below on the configuration details page.

Related Articles