



Administration Setup Questions

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What do I need to do in order for my survey administration to start?

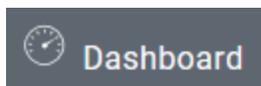
In order to begin your administration the following must be completed (or sent to us at StudentSuccessTech@RuffaloNL.com):

1. Recipient file containing email address, first name and last name must be loaded.
2. Email message must be setup in your survey administration page. Sample text is available via the attachment on your confirmation email or at your survey administration page.
 - If applicable, register our system email address of StudentSuccessTech@RuffaloNL.com with your technology department to avoid security settings; be sure to provide the dates emails are expected to come through.
3. Survey Customization (Optional)
 - Campus Defined Items: statements that may be rated for importance and satisfaction (125 character limit per question).
 - Campus Defined demographic question: multiple choice questions or statements that provide up to six options to select one response from (character restrictions: 109 characters per question and 50 characters per response).
 - A list of your specific programs/majors along with a four digit numeric identifier
4. Send yourself a sample of the email messages
5. Preview the survey

I'm interested in your 'best practices' for completion rates. Do you have additional resources?

We have a variety of resources and suggestions for a successful online administration which can be found on our Website: <https://client.RuffaloNL.com/OnlineAdminResources>. We also have a brief recorded tutorial on this topic which is located here: <https://client.RuffaloNL.com/SatisfactionSurveyTutorials>. We encourage you to review these resources and to contact us if you would like to brainstorm additional options to boost your response rates.

What do all the links on the administration page mean?



Your Dashboard is quick overview of your account. You will find the end date, scheduled emails, and completion counts are all reflected here. As your survey activity gets underway, the completion count will populate and a line graph will present a visual display of the activity.

Your survey will close at 6:00 a.m. CST on the date listed. This ending date can be changed. *If you wish to close earlier or later than the date already in place, you may click on Edit Administration on the top of the screen or View/Edit Admin on the bottom.*

Edit Administration: The Edit Administration button allows you to change your end date and view the specifics of your survey administration. You may also change your 'greeting line' and 'survey introduction' for the first page of your survey administration.

Additionally, a 'sample survey' link is available here. This link may be shared for testing purposes, but remember, this link will not capture responses.

View Demographics: As your survey activity gets underway, the demographic count will populate. This information is reflected in real-time.

 Audience

This section allows you to import a student/**individual** file, export a student/**individual** list (most commonly **used to access the** completed student/**individual** records) or create anonymous passcodes (not assigned to any specific survey recipients)

Import: The Import – Import Recipients button allows you to upload a student/individual file. The file must be in this exact order as the template and your header row must exactly match. If you are not uploading all the requested information, leave the header row, but leave the column blank. If you are not uploading a passcode, a random passcode will be assigned to each individual. The items noted with '*' are required. Once your file is uploaded, save as an Excel and use the Browse – Import button or drag and drop the file to the designated area.

Unassigned Passcodes: The Unassigned Passcodes button allows you to create anonymous passcodes that are not assigned to any individuals. These passcodes can be used to distribute locally with the standard survey URL of: <https://survey.ruffalonl.com>.

 Survey Items

Survey Items allow you to add/edit/remove your satisfaction/importance items, demographics items, or program/majors. Using the check boxes at the top of the page, you can view all survey items or you campus specific items.

Add New: Allows you to individually add your satisfaction/importance items, demographic items, or majors.

Import Questions: Allows you upload your importance/satisfaction items or your program/major file. Templates are available for both uploads

 Email

Allows you to setup email messages to be sent to your survey recipients. There is no additional costs to use this tool or for setting up any number of email messages. Sample email text can be found attached to your confirmation email or by using the email wizard within the Email button at your administration page. The bracketed items with your sample text are merge fields that will merge in the designated text when the email is sent.

Email Setup: Use the Email Setup button to create your email messages.

 Sample

Allows you to sample the survey exactly as your survey recipients will see the survey.

Can I change my end date?

Yes, your end date can easily be changed under the Dashboard option of your survey administration page or by contacting StudentSuccessTech@RuffaloNL.com with your updated end date.

How can I customize my survey?

You have three ways to customize your survey. They are:

1. Importance/Satisfaction Items: 10 statements (20 for ASPS) that may be rated on satisfaction and importance (125 character limit per question). Contact Shannon.cook@Ruffalonl.com for examples.
2. Campus Defined demographic question: 2 multiple choice questions or statements that provide up to six options to select one response from (character restrictions: 109 characters per question and 40 characters per response). Contact Shannon.cook@Ruffalonl.com for examples.
3. A list of your specific programs/majors along with a four digit numeric identifier: An unlimited list of your specific programs/majors with a four digit numeric identifier.

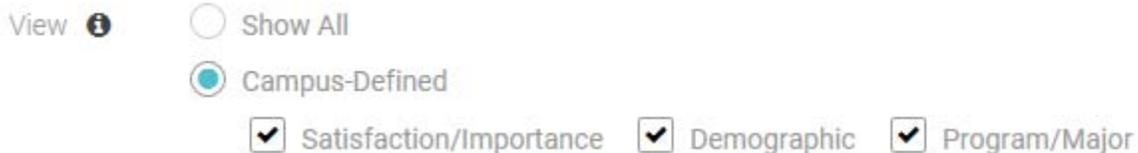
How can I add/edit/import my Importance/Satisfaction Items?

Video Tutorial

Under the *Survey Items* section of your administration page you can add/edit/import the customizable portions of your survey. Importance/Satisfaction Items are 10 statements (20 for ASPS) that may be rated for a level of importance and satisfaction (125 character limit including spaces per question).

If you want to **edit** existing items:

1. Select Survey Items from the menu on the left
2. Make sure your view is set correctly



3. Select the edit icon () or click on the actual item on the Importance/Satisfaction item you wish to edit.
4. Modify the 'title' (the text as you would like it to appear on the survey) as needed.
5. Select Save

If you want to **add** a new item:

1. Select Survey Items from the menu on the left
2. Select Add New in the upper right corner
3. Select Importance/Satisfaction from the Survey Item Type dropdown
4. Enter you Title (the text as you would like it to appear on the survey)
5. Select Save

If you want to **upload** a file with all your Importance/Satisfaction Items:

1. Select Survey Items from the menu on the left
2. Select Import Question in the upper right corner
3. Make sure Import Importance/Satisfaction Questions is checked at the top

Import Importance/Satisfaction Questions

4. Create your file (if you haven't done so already).

- a. The file must be a one column Excel file with the header row of: Importance/Satisfaction Item*
 - i. For a template, select Get Import Template
 - ii. Your file can contain up to 10 items (20 for ASPS) that are up to 125 characters including spaces. Your file should look something like this:

	A
1	Importance/Satisfaction Item*
2	The Student Support staff are helpful.

5. Select the Browse button and browse to your newly created file (or drag and drop the file into the designated area)
6. Select Import at the bottom on the screen
 - a. Note, if you entire file does not load. Please update your file to make sure it fits within the parameters and re-load the entire file.

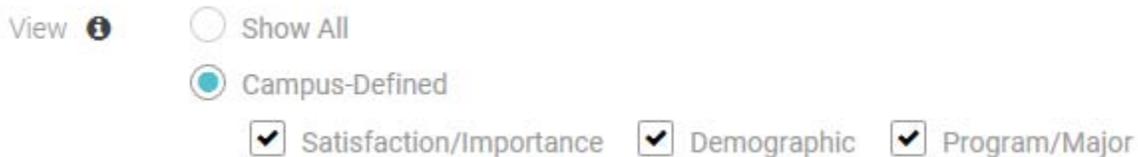
How can I add/edit my campus defined demographic questions?

Video Tutorial

Under the *Survey Items* section of your administration page you can add/edit the customizable portions of your survey. You may have up to two Campus Defined demographic question. The questions must be multiple choice questions or statements that provide up to six options to select one response from (character restrictions: 109 characters per question and 50 characters for responses). You do not need to use all six possible responses. For example, you can ask a Yes/No question with just two options.

If you want to edit existing items:

1. Select Survey Items from the menu on the left
2. Make sure your view is set correctly



3. Select the edit icon () or click on the Demographic item you wish to edit.
4. Modify the 'title' (the text as you would like it to appear on the survey) and answers as needed.
 - a. Note, if additional answers are needed, select Add an Answer. And if answers need removed, select Delete.
5. Select Save

If you want to add a new item:

1. Select Survey Items from the menu on the left
2. Select Add New in the upper right corner
3. Select Demographic from the Survey Item Type dropdown
6. Enter the 'title' (the text as you would like it to appear on the survey) and answers as needed.
 - a. Note, if additional answers are needed, select Add an Answer. And if answers need removed, select Delete.

4. Select Save

How can I add/edit/import my list of program/majors?

Video Tutorial

Under the *Survey Items* section of your administration page you can add/edit/import the customizable portions of your survey. You may add a list of your specific programs/majors along with a four digit numeric identifier: An unlimited list of your specific programs/majors can be uploaded.

The four digit numeric code is required but does not need to mean anything at your institution but is the driver for our survey. So if you have used a code in the past, **we encourage you to** use the same code **for this administration**. The **survey taker** will not see the four digit code as only the 'name' appears on the survey.

If you want to **edit** existing items:

1. Select Survey Items from the menu on the left
2. Make sure your view is set correctly



3. Select the edit icon () on the Program/Major item.
4. Modify the 'title' (the text as you would like it to appear on the survey) as needed.
5. Add/Move/Delete your responses
 - a. Modify the text so your major appears – select the green check box after you add each one
6. Select Save

If you do not currently have a program/major field listed and want to **add** one manually (not with an upload):

1. Select Survey Items from the menu on the left
2. Select Add New in the upper right corner
3. Select Program/Major from the Survey Item Type dropdown
4. Enter your Title (the text as you would like it to appear on the survey). Example = Program
5. Select Add an answer for each of your majors
6. Modify the text and numeric code so your major appears – select the check box after you add each one
 - a. Note, the   allow you to move the response up or down in the listing
7. Select Save

If you want to **upload** a file with all of your Program/Majors:

1. Select Survey Items from the menu on the left
2. Select Import Question in the upper right corner
3. Make sure Import Program/Majors Questions is checked at the top

Import Program/Majors Questions

4. Create your file (if you haven't done so already).
 - a. The file must be a Two column Excel file with the header row of: 4 Digit Code* and Program/Major*
 - i. For a template, select Get Import Template [Get import template](#)
 1. Note, your file will appear in the order in which it is uploaded.
 - ii. Your file should look something like this:

	A	B
1	4 Digit Code*	Program/Major*
2	1001	Accounting
3	1002	Elementary Education

5. Once saved, select the Browse button and browse to your newly created file (or drag and drop the file into the designated area)
6. Select Import at the bottom on the screen
 - a. Note, if you entire file does not load. Please update your file meets the requirements (header row, 4 digit numeric code, and program/major name).

How do I upload my student/individual file?

Video Tutorial

Import: The Import button allows you to upload a student/individual file. In order for your file to upload, you will create an Excel file with the following Excel headers.

Passcode	Primary Email *	First Name*	Last Name*	Secondary Email	Student ID	PhoneNO

FYI, you can download a sample file under the Audience – Import – Import Recipients button at your survey administration page.

Get import template

The file must be in this exact order and your header row must exactly match. If you are not uploading all the requested information, leave the header row in tact but leave the column blank. **If you are not uploading a passcode**, a random passcode will be assigned to each individual. The items noted with "*" are required. Once your file is created, save as excel. An example of a file is:

	A	B	C	D	E	F	G
1	Passcode	Primary Email *	First Name *	Last Name *	Secondary Email	Student Id	PhoneNo
2		samplestudent1@RNL.com	Sample One First	Sample Last	ss@gmail.com		
3		samplestudent2@RNL.com	Sample Two First	Sample Last			
4		samplestudent3@RNL.com	Sample Three First	Sample Last		123456	3335556666

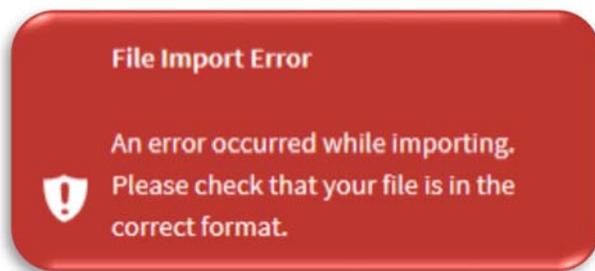
The Student ID field allows you to upload your student's ID. This allows you to easily match back your local student data with your raw data (if purchased). The PhoneNO field, allows you to upload the students phone number. If you wanted, you could export the student file with URL and send a text locally (at your institution), through your texting services.

To Import your file:

1. Select your specific survey administration from your list
2. Select the *Audience* button on the right
3. Select *Import*
4. Select *Import Recipients*
5. Browse to your file and select Open
6. Select the *Import* button at the bottom of the screen

Your file will then come back with the number of successful records, duplicate records (already existing in your survey administration), or failed records.

Note, if you receive the error message below, you need to go back and make sure your file looks EXACTLY like the template above with the rows populated with the required information. If you have used the template and still receive an error, try pasting only “values” into the spreadsheet (123)



I uploaded my recipient file, but received errors. What do the errors mean? What do I do next?

Once your file upload is complete, you should see the number of valid, invalid and duplicated records. If clicked on, those counts should open an Excel file that provides more detail on the error that was encountered.

Valid ⇅	Invalid ⇅	Duplicate ⇅
36 	0 	0 

Once you have found your error, correct the error and re-load (just the errors). However, if you happen to re-load your entire file, don't worry. The system will recognize the existing students (based on email address) and kick out the second set as 'duplicates'.

[Back to Import History](#)

If you want to 'delete' your entire upload and start again. Click on the button. Here you can delete your entire upload and start again.

[Decoding Error Messages:](#)

- *Duplicate passcode found*: this means the passcode you assigned to this recipient is either existing elsewhere in your file OR that this passcode is existing in another survey administration. Either way, the record will need assigned a new passcode.
- *Duplicate Primary email found*: this means that email address already exists in this survey administration.
- *Invalid Email Format*: this means the format of your email was not a standard format (most likely it contains a space). We suggest starting by doing a 'replace all' function in Excel and do a space replaced with nothing.
- *Missing name value*: this means a first or last name are missing for the designated recipient.
- *Missing email*; this means the recipients' record was missing an email address.

I don't want to upload a recipient file, what can I do?

If you don't want to upload a recipient file, that is fine. Instead, you can generate random passcodes and distribute them locally to your students with the standard survey URL. Or you can distribute the Personal URL links locally (this can be used on your portal or sent via a mail merge on your campus). The key is that each student needs either their unique passcode or their unique URL.

The standard survey URL needed is: <https://survey.ruffalonl.com>

To generate random passcodes:

1. Select your specific survey administration from your list
2. Select the *Audience* button on the right
3. Select *Passcode*
4. Select *Create Passcodes*
5. Type in the number of passcodes you need and select *Create*

0	Create
---	--------

6. This should prompt a ribbon at the bottom of your screen, you can then open or save the file. The passcodes included in the file can be used with the standard Survey URL. Or the Personal URL found in the file can be distributed locally to the survey recipients (note, each recipient needs their own link if using the personal URL).

I created 'Unassigned passcodes' but I'm not sure where they are. How can I get them?

1. Select your specific survey administration from your list (if you aren't already there)
2. Select the Audience Link on the left hand menu
3. Select Unassigned Passcodes at the top
4. Click on the download option **15**  (you should then be prompted to open or save the excel file).

What link do my students need to access the survey?

If you are sending emails from the RNL survey administration page, you want to make sure the merge field of: `{{surveylink}}` is in your messages. This will ensure when your survey recipients receive their message, they will receive their personal URL link to the survey.

If you are administering your survey locally (either via lab, email or whatever other forum), you will want to send out the personal URL link (found on the Audience – Import – Export Survey Recipients Link) or send the standard survey URL link of <https://survey.ruffalonl.com> with the recipients' passcode.

How do I setup my emails to be sent to my survey recipients?

Video Tutorial

1. Select your specific survey administration from your list
2. Select the *Email* button on the right
3. Select *Email Setup*
4. Go through the prompts
 - a. Select your email type: either an invitation or a reminder message
 - b. Select your template: based on who your audience is
 - c. Populate the required information on the 'heading'
 - i. From name: The name or department the email will appear to be coming from
 - ii. Reply to email: The email address replies from survey takers would be routed to should they click reply.
 - iii. Subject: Note in the templates the merge field for first name will appear. If needed, the merge field is: {{firstname}}
 - iv. Scheduled transmission date: the date you would like your email sent (messages are typically sent between 7:30-9:30 a.m. CST (with a little variance based on the day's email volume)
5. Select Next
6. This should bring up the body of the message. A template will appear, but feel free to modify as you would like.
 - a. Note, if you are copying and pasting a message from word, you might need to first copy the message into a notepad that removes all the word formatting. Once copied from the notepad, you can paste into the body of the message.
 - b. If you use the Insert Merge Field button, once your email is sent, the email will be personalized with those fields.

Insert Merge Fields ▾

7. Select Next
8. Determine if you want to save your updated text as a template for this administration or for another administration.
 - a. If you do, select the box
 - i. Then populate the 'name of the template' for your reference and later use.
 - ii. Select Next
 - b. If you do not, select Next
9. Review your email details and select Schedule Email

Note:

- a. Once scheduled, your email will be sent as scheduled.
- b. On the Email Activity screen, the Success/Failed emails will populate several days AFTER the actual email message has been sent.
- c. If you need to modify your message once saved, select the *Edit* icon on the right.

How do I ensure my email messages are setup correctly with the correct link?

1. Go back through your email message (using the *Edit* icon) and make sure the merge fields appear exactly as they do when you select ." data-bbox="501 154 709 196"/>
2. Send yourself a Sample of the email message and confirm that when you click on the link, it does work (note the link you receive in your sample message is the 'sample survey link' you want to make sure your email messages actually have the merge field of {{surveylink}}).

Why should I whitelist your IP address? And how do I whitelist your IP address?

If you plan on sending email invitations to your survey recipients using the institutional email address, our suggestion is to first whitelist our domain addresses of @RuffaloNL.com and @mandrillapp.com. If that is not an option, you may whitelist our IP addresses.

To do this, send your IT team a message similar to this (feel free to customize as you wish and plug in your dates in the blank spaces):

We are running the Ruffalo Noel Levitz satisfaction survey to our students from _____ to _____. Please whitelist the domains for @RuffaloNL.com and @mandrillapp.com.

If they indicate they cannot whitelist the domains (which is the suggestion by RNL), you can provide them with the IP addresses of:

ip4:198.2.128.0/24
 ip4:198.2.132.0/22
 ip4:198.2.136.0/23
 ip4:198.2.186.0/23
 ip4:205.201.131.128/25
 ip4:205.201.134.128/25
 ip4:205.201.136.0/23
 ip4:205.201.139.0/24
 ip4:198.2.180.0/24
 ip4:198.2.179.0/24
 ip4:198.2.178.0/24
 ip4:198.2.177.0/24

Note, if you send a message to your IT team and they indicate that they cannot whitelist an IP address, don't be alarmed. You can probably launch as planned and you will not encounter any difficulty. We suggest that you proceed as planned. After your initial email is sent, login and confirm that you completion rate is increasing and you don't have a large number of fails or bounce backs on your email history.

Can I see a sample of my IT email messages?

Yes, you can.

1. Select your specific survey administration from your list
2. Select the *Email* button on the right

3. Select *the email icon*  (note this will not appear until you have actually setup your email messages)
 - a. Note the link you receive in your sample message is the 'sample survey link'.

Do I have to send email messages?

No, but you will need to distribute the Survey URL and passcodes or Personal URL in some way. See, 'What link do my students need to access the survey?' for additional detail related to this.

When will my email messages be sent?

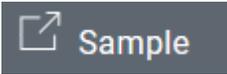
Once your email messages are scheduled, you are ready to start. The survey will automatically launch on the scheduled date. Emails are sent Monday-Friday. Typically between 8:00 a.m. and 11 a.m. CST.

How do I 'start' my survey?

Once your email messages are scheduled, you are ready to start. The survey will automatically launch on the scheduled date of your emails. Prior to launch, we suggest you do one final check to make sure:

1. Your recipient count is what you anticipated on your 'dashboard'
2. Your Survey appears as you expected. You may test using the Sample button. Pay careful attention to any of the campus defined items you have added to the survey.
3. Your email messages appear as you expected. Send yourself a sample of your email messages (Email button).

Can I preview my survey?

Yes, select the Sample link on the far right.  Or select Dashboard and then Edit Administration. Your Sample Survey link is at the bottom of the page. Remember, this is just a sample link and should not be widely distributed.

Can I 'view my demographics' as the survey is being completed?

Yes, you may. The demographics will populate as surveys are completed in real time. To view them:

1. Click on the Dashboard link on the left hand menu
2. Click on the View Demographics link at the top of the page

Can I download a list of survey recipients that have completed or not completed the survey?

Yes, you can download list of survey recipients. You can download those who have completed the survey, those who have not completed the survey, and/or all survey recipients (completed or not completed). To do this:

1. Login at <https://client.ruffaloNL.com>
2. Select Satisfaction Priorities Web Survey from the myApplications link
3. Select your survey administration from the list (if your survey has closed, you will need to change the option to closed)
4. Click on the Audience link on the left hand menu (recipients should already be highlighted)
5. Set your filter to your appropriate population (All, Completed, Incomplete)

Complete Status  All Completed Incomplete

Email Opt-out  All Yes No

6. Select Export Recipients
7. You will be prompted to open or save your Excel file.

I have a survey recipient that indicates the link they received isn't working or they didn't receive a link even though they were included in my file upload, what do I do?

If the student received a link and they are indicating it does not work, have them try copying and pasting the link. That usually resolves the issue. If that doesn't work, try having the student send the link to you and you try the link.

If that doesn't work or the student didn't receive their email, you can send the student the standard survey link and their passcode. The standard survey link is <https://survey.ruffaloNL.com> and you may access their passcode by:

1. Selecting your survey administration
2. Selecting Audience
3. Searching for the desired student
4. Copy and paste the passcode listed

I told our recipients we would be selecting winners for our incentive, how do I do that?

You can select your winners in two ways:

1. After the close of your administration, send a note to StudentSuccessTech@RuffaloNL.com to select the indicated number of winners from your survey administration and we will select the winners for you and provide the names to you via email.
2. Pull the list of individuals who have completed the survey and select your winner. You can do this by:
 - a. Login at www.ruffaloNL.com
 - b. Select Satisfaction Priorities Web Survey from the myApplications link
 - c. Select your survey administration from the list (if your survey has closed, you will need to change the option to closed)
 - d. Click on the Audience link on the left hand menu (recipients should already be highlighted)
 - e. Set your filter to your appropriate population (Completed)

Complete Status  All Completed Incomplete

Email Opt-out  All Yes No

- f. Select Export Recipients
- g. You will be prompted to open or save your Excel file.

Can recipients 'opt out' of the survey?

Yes, they can, but it requires you to login and manually change their status. This can be done by:

1. Click on the Audience link on the left hand menu (recipients should already be highlighted)
2. Find the survey recipient in the list (there is a search function at the top)
3. Select the 'Edit' link on the far right of their record
4. Select the 'Opt-Out' button found at the bottom

Once the Opt-Out function has been selected, the survey recipient will no longer receive additional notification or reminders from our system to complete the survey.

Can I change a survey recipient's information once the file has been uploaded?

Yes, you can but it requires you to login and manually change their record. This can be done by:

1. Click on the Audience link on the left hand menu (recipients should already be highlighted)
2. Find the survey recipient in the list (there is a search function at the top)
3. Select the 'Edit' link on the far right of their record
4. Change the needed information

Who will receive the reminder email messages?

Only those students who have not completed the survey and whose status has not been changed to 'opt-out' of the survey will receive reminder messages.

My email messages sent, but I received failed/bounced emails. What can I do?

It depends on the fail or bounce back message you received.

After a bounce occurs for a recipient email address, Mandrill (our email provider) stops attempting delivery of the email. Further email to that address will be rejected temporarily. Bounces are undeliverable emails. They are usually separated into two categories: hard bounces and soft bounces. Mandrill uses a specific set of heuristics to determine whether a bounce should be classified as hard or soft. Typically, permanent errors like non-existent mailboxes will get classified as hard bounces, while quota errors and other temporary issues are treated as soft bounces.

If it failed/bounced because the email is bad, you can simply adjust the survey recipients email address; see the section titled 'Can I change a survey recipient's information once the file has been uploaded?' for more detail related to this.

While this is quite rare, if all your emails bounce back and you are using a school email address, you may need to whitelist our IP address and re-send the email message. See the section titled 'Why should I whitelist your IP address?' for detail on whitelisting your IP address. Once this is completed, you can re-schedule your email message.

My survey has closed, now what?

If your completion rate is above 20%, no additional action is needed on your part. We will automatically proceed with closing your account.

If your completion rate is below 20%, look for an email from StudentSuccessTech@RuffaloNL.com requesting confirmation that you would in fact like to proceed with closing. (The 20% rate is the average response rate for online administrations and it is a good target to strive for). At that point, you can either re-open and do additional outreach (via email or something local) or proceed with closing. If you want to proceed with closing, simply respond to the email indicating that you would like to proceed with closing.

When and how will I receive my results?

Results are typically delivered 5-10 business days from the close date of your online administration (or after we receive confirmation that we should proceed with closing – see note above). When your results are ready, you will receive an email notification that your results are available to download through your SafeMail account at your myRuffaloNL account (additional information and directions will be included in the email). Please remember to save your results locally as they are only available at your SafeMail account for a limited time period.