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Quick Start Guide: Questionnaires

How to respond to a questionnaire

- Login to https://app.plia.com.
- Select **TASKS** on the black menu bar.
- **QUESTIONNAIRES** will already be selected on the grey submenu.
    - All questionnaires that require a response will be listed on the left.
- Click on the questionnaire to which you would like to respond.
    - All unanswered questions will be shown in the main content area on the right.
- Click the **EDIT TASKS** button to open the response form.
- Enter your responses.
    - You may add optional explanations and attachments on any response form.
    - You can save your responses without sending to your client by clicking SAVE at anytime
    - Some questions may be pre-populated with your previous responses to this client or other clients
- Click the **APPROVE** checkbox when complete.
    - You can either approve individual responses or select Mark All Approved
    - If you are a 1st Level user, your approved responses will be sent to the client.
    - If you are not a 1st Level user, your approved responses will simply be sent to next level of users within your firm.
- Click the **SAVE** button to *send to your client*.
    - Responses you marked as approved will be removed from your screen.
    - When all the questions in a questionnaire have been approved, the questionnaire is complete and will be removed from the list on the left.

To verify that your response(s) have been sent to the client

- Go to the DASHBOARD / QUESTIONNAIRES screen and scroll down to the ***Internal Completion*** graph.
- The "client questionnaire" bar will be *green* (published) for the responses you completed and sent to the client.