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Quick Start Guide: Flags

How to respond to a flag

- Login to https://app.plia.com.
- Select **DASHBOARD** on the black menu bar.
- **QUESTIONNAIRES** will be selected on the grey menu bar.
- Scroll down to the **Internal Completion** section.
  - This section shows your firm's progress responding to client questionnaires.
  - Questionnaires with flagged responses will have a red flag icon on the right side of the color-coded bar.
- Click on the **GRAPH BAR** for the client questionnaire referenced in your notification email.
  - This will populate the right side of the panel with a listing of the questions included in the questionnaire. A form is provided above the list to facilitate searching and filtering the questions.
- Deselect the **UNFLAGGED** checkbox on the question search form.
  - This will limit the question list to flagged responses only.
- Click on the **PENCIL ICON** (i.e., edit button) next to the flagged question you want to edit.
  - A dialog will be presented to confirm your intent to "unpublish" a previously approved task.
- Click on the **CONFIRM** button.
  - The question will be sent back to the TASKS section with the response form already open.
- Edit your response.
- Click the **APPROVE** checkbox when complete.
  - If you are a 1st Level user, your response will be sent to the client.
  - If you are not a 1st Level user, your response will simply be sent to next level of users within your firm.
- Click the **SAVE** button send.
  - If you marked the response as approved, it will be removed from your screen.