Authorize a Birkman Questionnaire

Purpose:

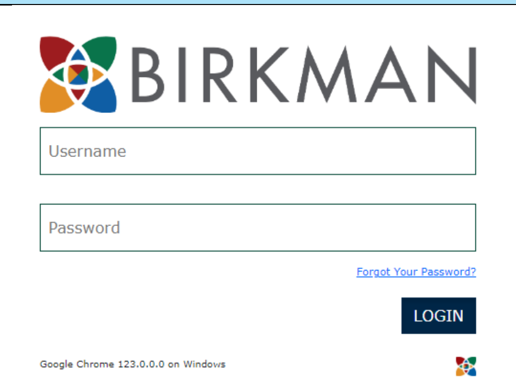
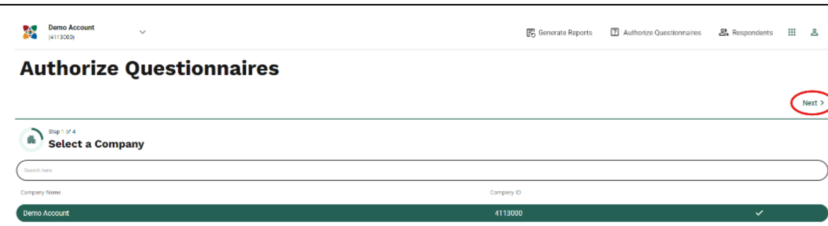
Use these steps when you are ready to send or "authorize" the participants in your organization the Birkman Method Questionnaire.

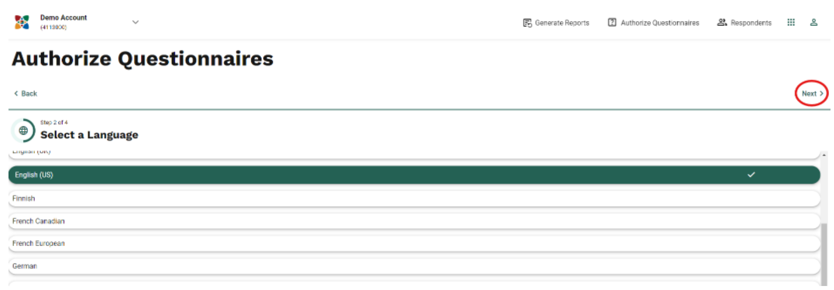
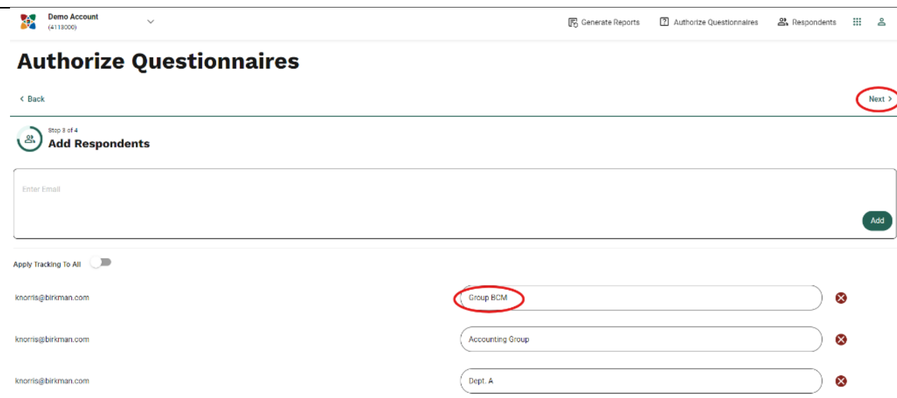
Options include:

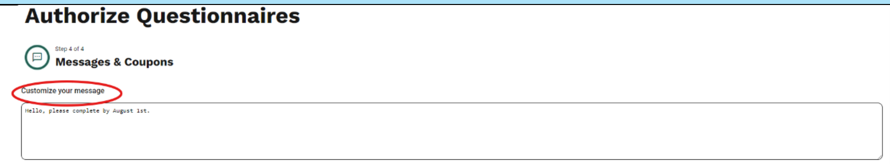
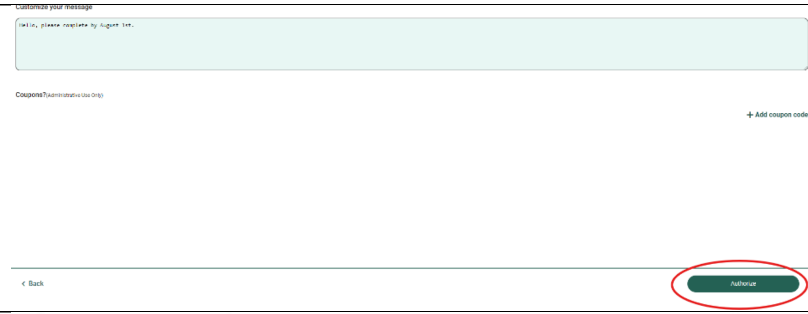
- Creating categories to track groups of participants, called "tracking."
- Creating a custom email to send with the invitation to complete the Questionnaire

Need help?

- For technical assistance with BirkmanDirect or MyBirkman - support@birkman.com
- For strategy and implementation assistance – your Birkman Account Manager.

Step	Action	Result
1	Log in to BirkmanDirect direct.birkman.com. Note: To reset your password, click **Forgot Your Password?**	
2	Click **Authorize Questionnaires** at the top of the Home page. **Note:** There are two buttons that will take you to the same screen.	
3	Select your Company name and click **Next** at the top of the page.	

Step	Action	Result
4	Select the language for the Questionnaire and click **Next** at the top of the page. **Note:** The respondent has the option to change the language to their desired language when they begin the Questionnaire.	
5	Type or copy/paste the email addresses of the respondents that will receive the Questionnaire using a space or comma after each. Click **Add**.	
6a Optional	To create a category to track respondents in a group, click the **Apply Tracking to All** slider and enter the text in the box below the slider.	 • Tracking can be applied to all respondents or individually. • Tracking categories are indicated on the Questionnaire complete email and monthly invoices • Generate Group Reports on specific categories (such as department, roles, teams).
6b Optional	To create a category to track individual respondents, enter the text in the box next to each respondents' email address. click the **Apply Tracking to All.** Click **Next** at the bottom of the page.	

Step	Action	Result
7	Enter a custom email message the respondent will receive with the instructions to complete the Questionnaire. Refer to the Birkman Enterprise Communication Email Template #5.	 **Note:** The text you enter will appear above the standard Birkman message with the link to the Questionnaire.
8	To send the Questionnaires, click **Authorize.**	
9	As respondents complete the Questionnaires, you will receive an email notification from donotreply@birkman.com with a link directing you to BirkmanDirect to retrieve the results.