## 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 <u>direct.birkman.com.</u> Note: To reset your password, click <b>Forgot Your</b> <b>Password?</b>	Username Password Errot Your Password Errot Vour Password ECGIN
2	Click Authorize Questionnaires at the top of the Home page. Note: There are two buttons that will take you to the same screen.	Interviewed     Inte
3	Select your Company name and click <b>Next</b> at the top of the page.	

Step	Action	Result	
4	Select the language for the Questionnaire and click <b>Next</b> at the top of the page. <b>Note:</b> The respondent has the option to change the language to their desired language when they begin the Questionnaire. Type or copy/paste the email addresses of the respondents that will receive the Questionnaire using a space or comma after each. Click <b>Add</b> .	Mericanic  Authorize Questionnaires  C Back  C Back	Concerte facors
6a Optional	To create a category to track respondents in a group, click the <b>Apply Tracking to All</b> slider and enter the text in the box below the slider.	<ul> <li>tronglithmaccon</li> <li>tronglithmaccon</li> <li>Tracking can be applied to all</li> <li>Tracking categories are indica complete email and monthly</li> <li>Generate Group Reports on s department, roles, teams).</li> </ul>	ated on the Questionnaire invoices
6b Optional	To create a category to track individual respondents, enter the text in the box next to each respondents' email address. click the <b>Apply</b> <b>Tracking to All.</b> Click <b>Next</b> at the bottom of the page.	Entropy     Entropy     Constrained     C	Coop 524

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 <u>Email</u> <u>Template #5</u> .	Authorize Questionnaires Messages & Coupons Messages With the link to the Questionnaire.
8	To send the Questionnaires, click <b>Authorize.</b>	c flack c flac
9	As respondents complete the Questionnaires, you will receive an email notification from <u>donotreply@birkman.com</u> with a link directing you to BirkmanDirect to retrieve the results.	Questionnaire Complete for:       Your organization       (Respondent's Name)         Imbox ×       Mon, Apr 15, 8:38 PM (8 days ago)         to me *       The questionnaire for       (Respondent's has been processed and given the ID G         Data follows:       Completed : 2024-04-15: 20:38       UserID : 0458214487ed67b3a9c4062a05d223e3         RequestID : 44215804-ED87-B367-A9C4-062A05D223E3       SubAccount : AACX000       Tracking : Your Tracking Category         Click the following link to access your BirkmanDirect system: <a href="https://direct.birkman.com">https://direct.birkman.com</a>