How to Post a Batch Online Annual Questionnaire

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To set up the 'Default Online Annual Questionnaire' select the Wolters Kluwer Logo drop-down > Administrative Tasks > Defaults > Default Online Annual Questionnaire. You will want to make any necessary updates to the Default Online Annual Questionnaire prior to creating batches, as this default will populate when first creating a batch.

Please Note: You cannot send invites unless you have 'Specify a Server' selected as the email sending method under the Compliance tab in the global email settings.

1. Select ‘Online Annual Questionnaire’ from the ‘Batches’ drop-down list on the ‘Select Company’ screen or from the Wolters Kluwer Menu > Batches > Online Annual Questionnaire.

2. Click on ‘Create New Batch’ and enter a batch name, then click again on ‘Create New Batch’.

3. You will be directed to the ‘Edit Batch’ screen where you can:

1. **Edit Name:** Modify your batch name.
2. **Email Template:** The email template will default according to what was set up in the Global Email Settings within the Document Tab. Click on “Edit” to update the email template or create a new template.
3. **Year End:** Enter in the Plan Year End (YYYY-MM-DD) for the plans you wish to add to the batch. If the PYE has not yet been added, it will be added once you add the plan to the batch.
4. **Change Filter:** Enter a Plan Year or select a checklist.
5. **Edit Questionnaire:** Provides several ways to update the Online Annual Questionnaire.
6. **Add Plans:** Plans will display based on the Filter and if they are not in another batch.
    a. When plans have been added, you are able to add/update portal users assigned to the plan with “Annual Questionnaire (Upload/Download/Complete Online)” permissions.
    b. You are also able to “Customize” the Online Annual Questionnaire for each of the plans within the batch.
7. **Post Batch:** Sends the Online Annual Questionnaire to the portal. If the “and send invites” box is checked, you will be able to post the batch and send the invites to the portal users at one time.
8. **Invited:** The date will populate once the portal user(s) have been invited to the portal.
9. **Downloaded:** The date will populate once the portal user(s) have submitted the Online Annual Questionnaire and downloaded/printed the document from the portal.

10. **Responded:** The date will populate once the portal user(s) have “Submitted” the Online Annual Questionnaire.

Note: To receive Confirmation that the portal user has viewed, responded (submitted), and/or downloaded the Online Annual Questionnaire, you will need to have the confirmation emails turned on within the Document Tab, or for the specific portal users, have a confirmation email entered for the Document Permissions.