Responding to an Assessment

When an assessment is assigned to a user, the user receives an email with a link to the assessment, and the assessment also appears in the Inbox of the user's unified symplr dashboard.

> **Note**
> When accessing the assessment via the email, if the user is not already logged into symplr, the user will be brought to the login page first.

To respond to an assessment

1. Navigate to the assessment.

   You'll be brought directly to the Instruction pop-up, whether there are instructions added or not. Any instructions included and/or attachments added by the assessment owner will appear here. Click the attachment file name to view the attachment.

2. Click **Close** to close the Instructions screen.

   Click **Show Instructions** at any time to review the instructions or uploaded attachments.

   The Questions screen shows the name of the assessment, who assigned it, the date it is due (if included), the status, and the questions. You can answer the questions or download the assessment.

3. The first question is highlighted by default. You have the option of answering either Yes, No or Not Applicable to all questions. Once a question is answered, you can clear a response.

4. Select each question to provide a response. Depending on the question and the selected response, contingent questions may be displayed.

   Contingent questions are denoted with the green link icon and will be displayed below the question to which they are contingent (i.e., 3.1 under question 3).

Contingent questions

1. Add a comment (optional).

   Comments may be added to each question. There is no way to go back and to add a comment once assessment questions have been submitted, as such, it is important to add comments before you move to the next question and/or click

Submit.

2. Click **Add Attachment** to upload a document.

   ### Allowable attachments

   Attachments may be added to each question.

   > **Note**
   > - The Send Email Notification button is grayed out unless in delegation mode.
   > - Questions may be downloaded in PDF or Microsoft Word.

3. If needed, delegate one or more questions to a different user.
4. The assessment can be closed before submission as the answers auto-save. The assessment can then be revisited at a later time for completion.
5. When all responses (including any responses for delegated questions) have been provided, the user can submit the assessment by clicking Submit Assessment.

   'The assignment was successfully submitted' message will appear.

> **Note**
> - Prior to submitting an assessment, the assigned user can change the response for any delegated questions this user has received back.
> - Multiple actions are available via the Actions menu.

To delegate questions

When delegating the primary question, if there are any contingency questions associated with the primary question, those will get delegated as well.

1. One or more questions may be delegated to another User, by clicking **Delegate Question**.

   > **Note**
   > If delegee user decides to delegate a question after answering it, the response will need to be cleared and any comments/attachments manually removed before the question is delegated.

   The Delegate Question overlay will display.

2. Click the Select Person dropdown to select the user to which the question should be delegated.

   The selected user's email address is auto-populated and is not editable.

3. Click the Due Date control to select the due date.
4. Click **Delegate**.

   If the desired delegation user is not present in the Select Person dropdown, add user by clicking **Add New**.

5. Fill in the First Name, Last Name, and Email Address fields.

6. Click **Delegate**.

Note

- The user who performed the delegation can revert it back via Revert Delegation. Once reverted, question/s can be delegated to a different user.
- If a user decides to delegate a question after providing an answer, the answer will be cleared before the question is delegated.