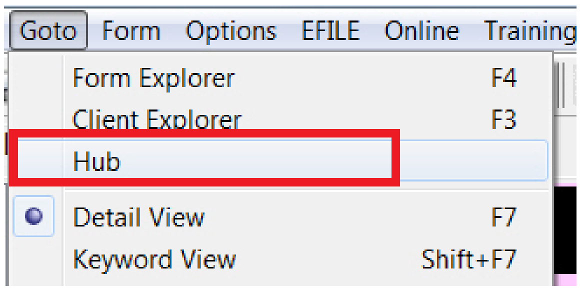
intuit profile

Using Questionnaire Templates in Hub

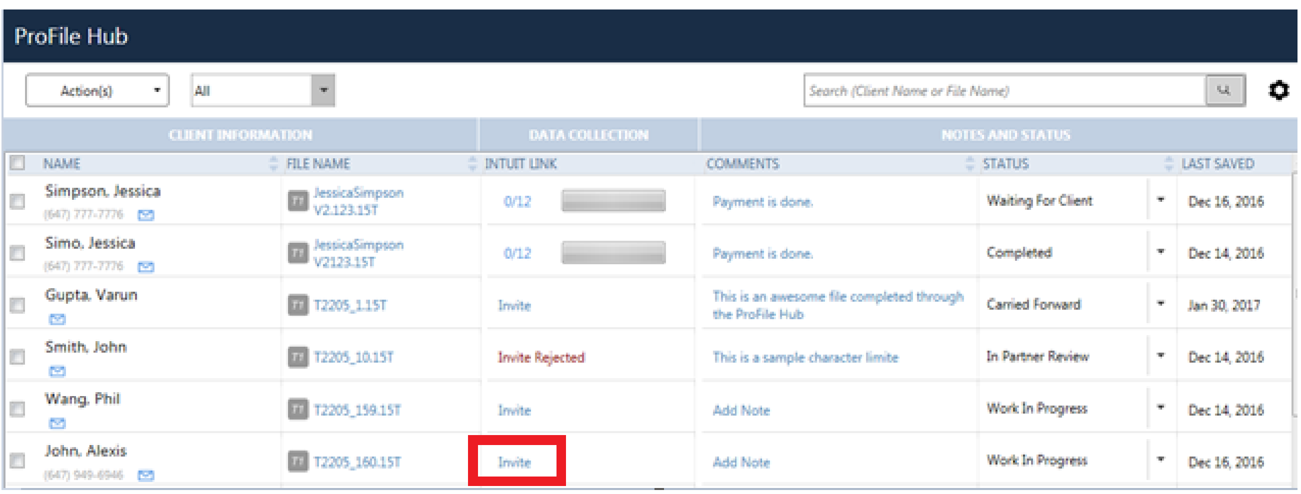
The questionnaire template in Hub allows users to compile and send questions via email for clients to answer. Questionnaire templates can be customized for type of clients, location, or any other need. In addition, response types can include either “Yes/No” or “Open-ended” responses.

Opening a Questionnaire Template

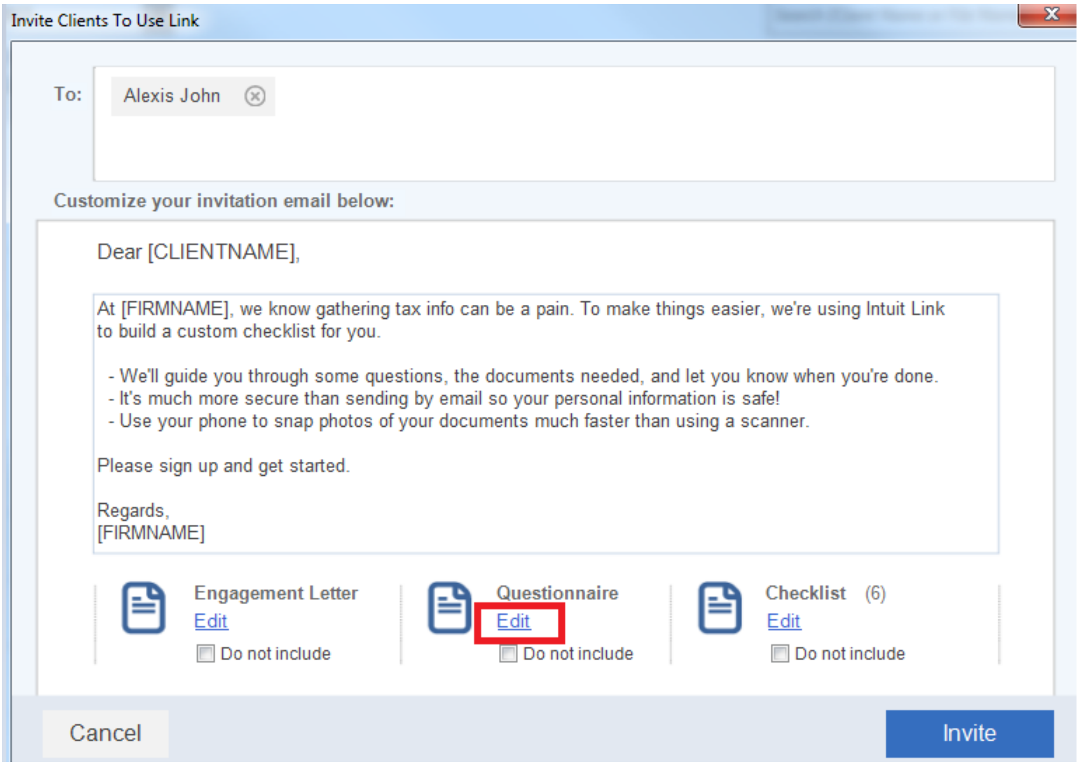
1. Open the ProFile application.
2. Select the “Hub” option from the “Goto” menu in the top toolbar.



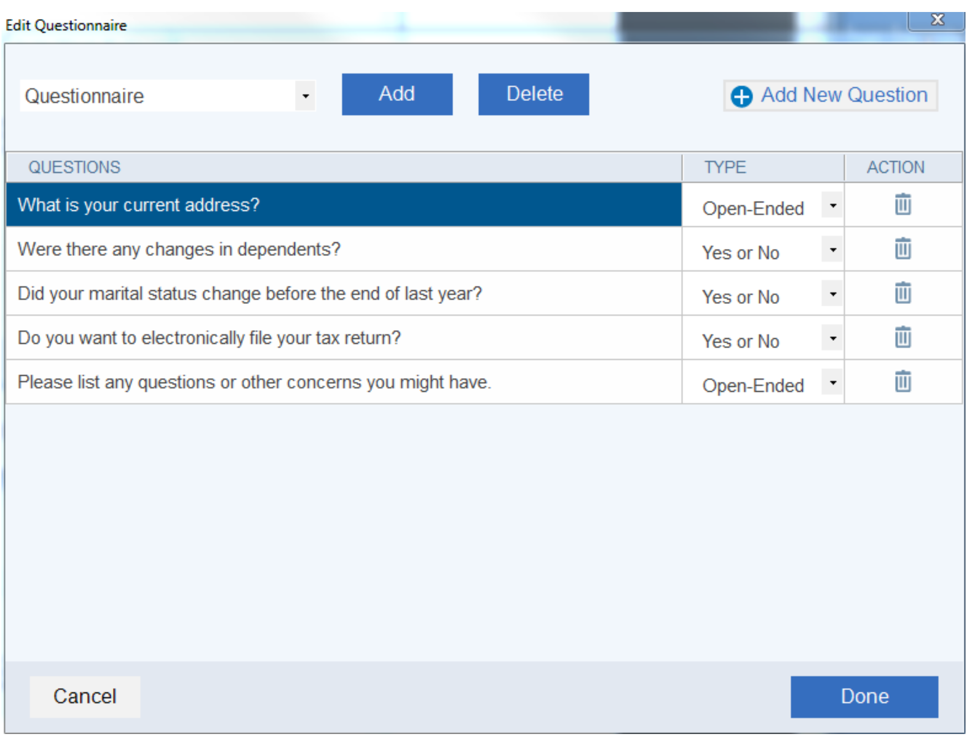
3. Hub opens, displaying a list of clients Identify the client to whom you want to send an engagement letter (e.g., “John, Alexis”). Click the “Invite” button associated with the client.



4. The “Invite Clients to Use Link” window opens. Select the “Edit” link from the “Engagement Letter” option.

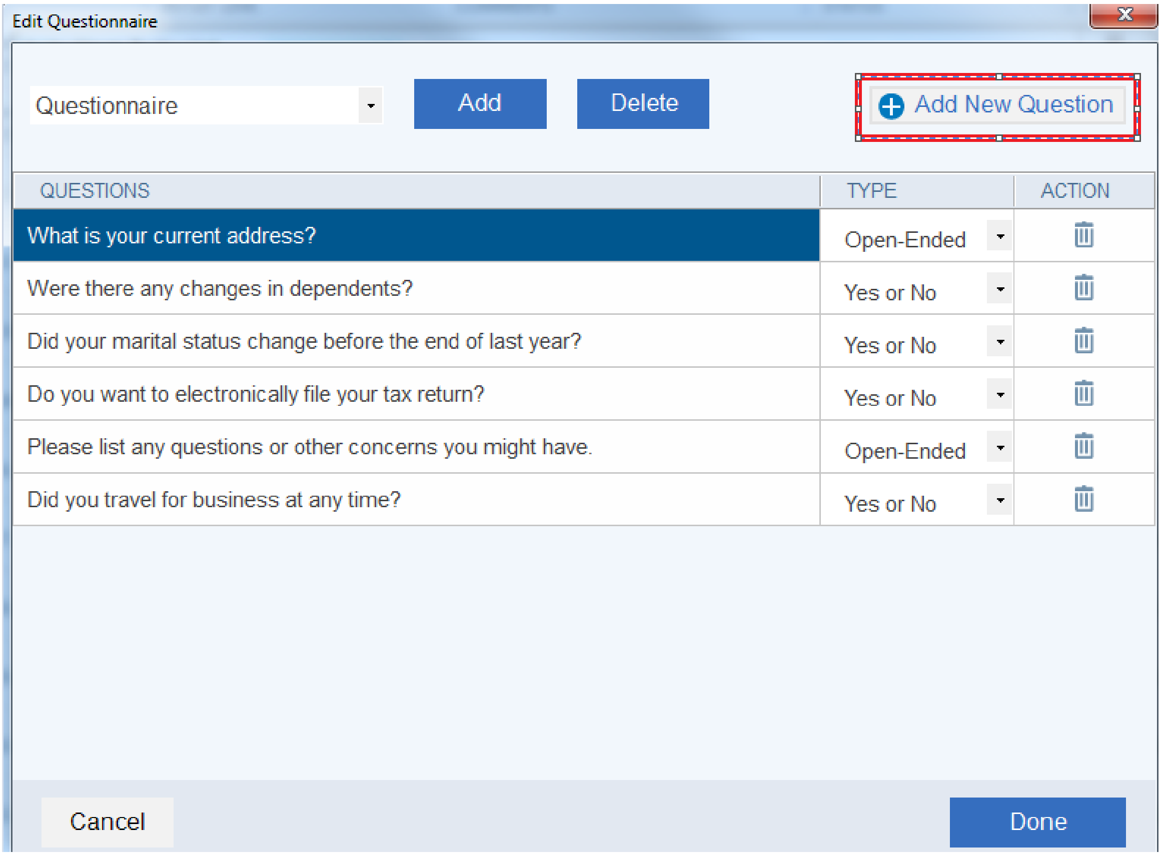


The “Edit Questionnaire” window displays:

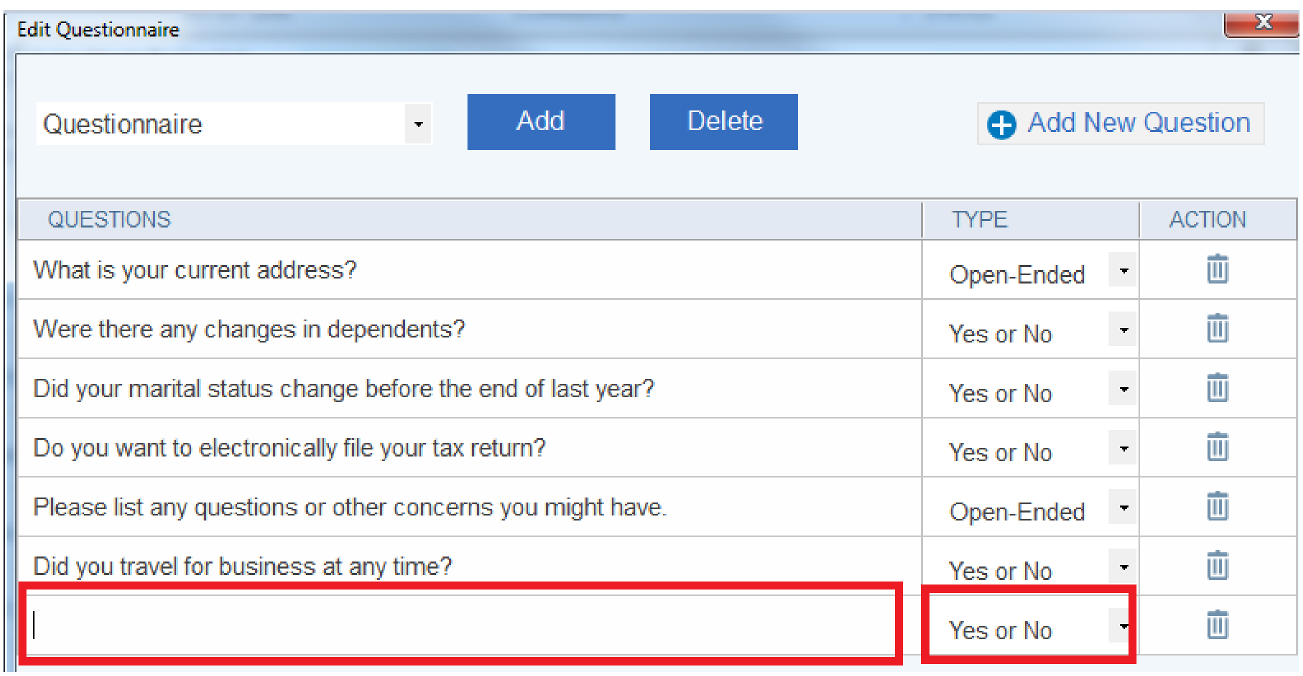


Creating a New Question

1. Click the “Add New Question” button.



2. Enter the new question into the blank field and select "TYPE" option, either "Yes/No" or "Open-ended".

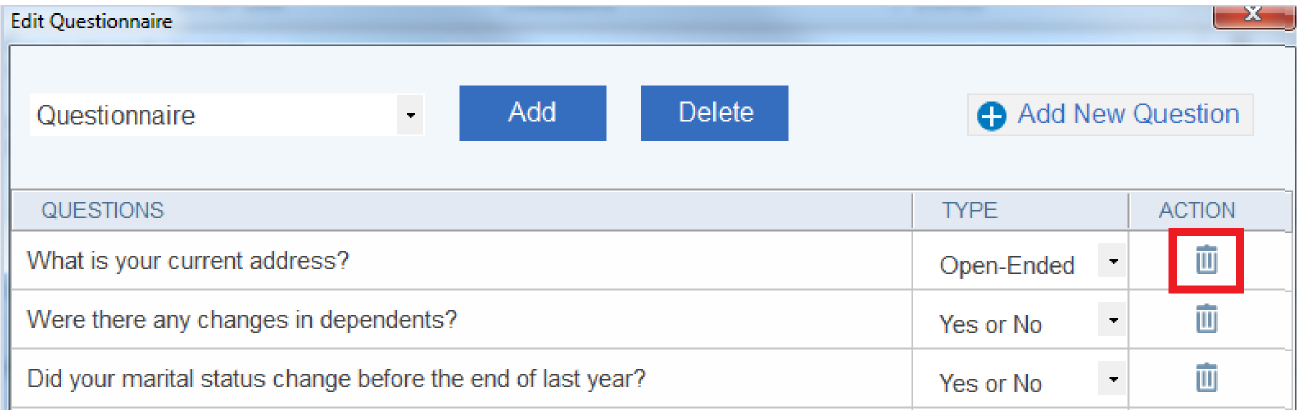


3. Click the "Done" button.

The new question is added to the questionnaire.

Deleting an Existing Question

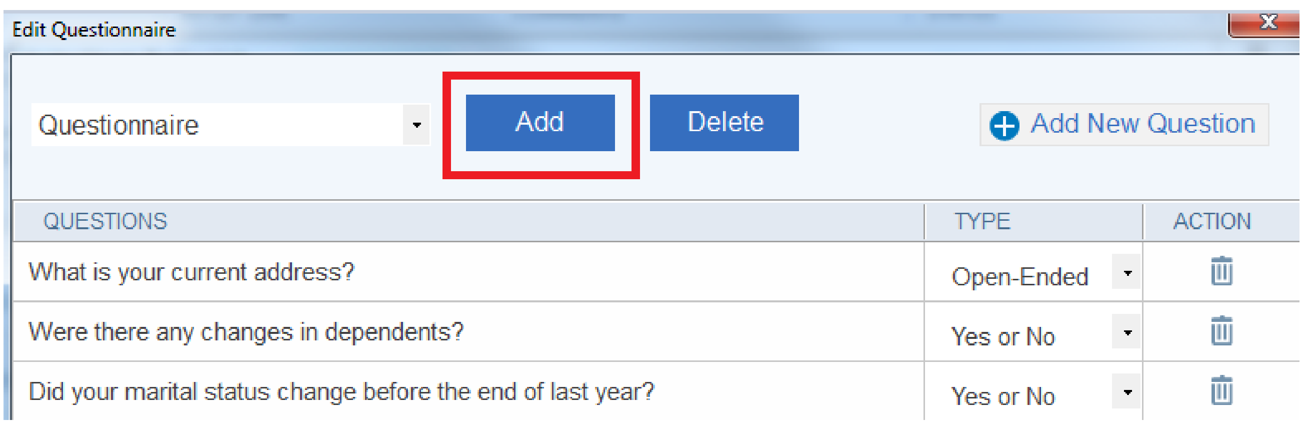
1. Identify question to be deleted from the questionnaire.
2. Click the trash icon corresponding to the question.



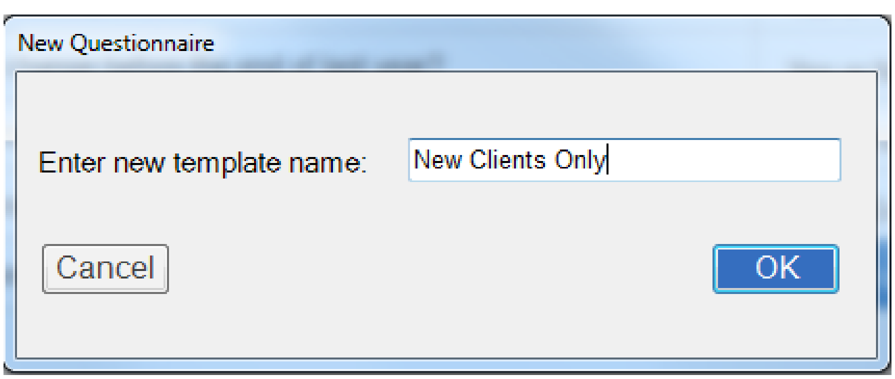
The question is deleted from the questionnaire.

Creating a New Questionnaire Template

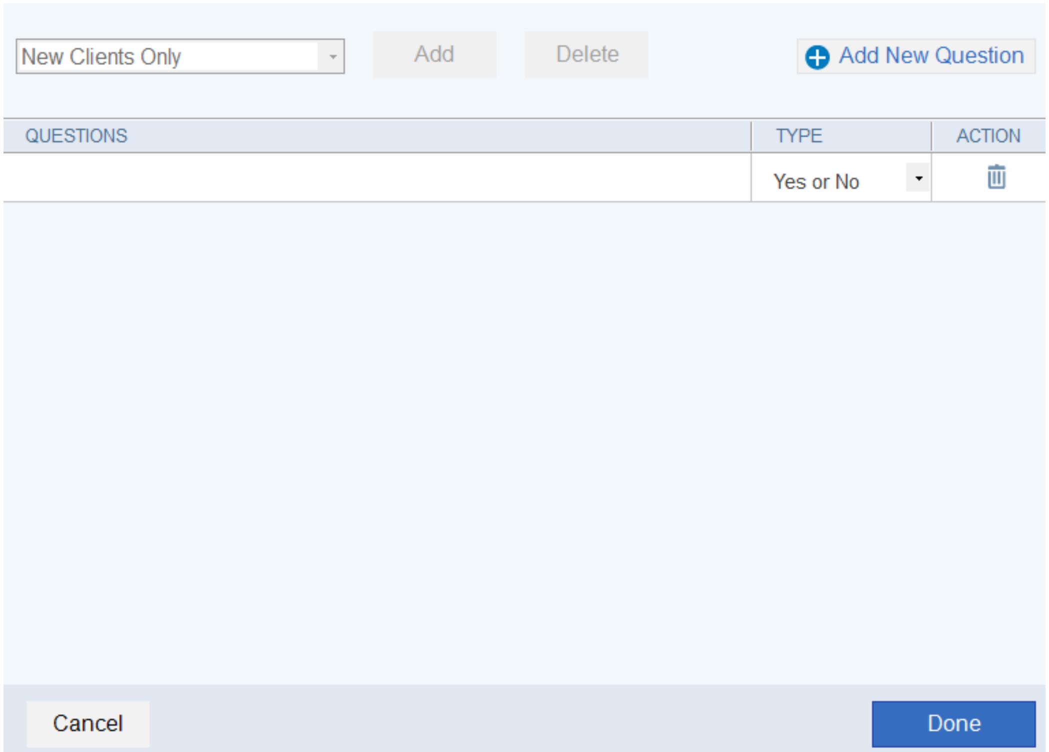
1. Add and delete questions to any questionnaire as necessary.
2. Click the “Add” button:



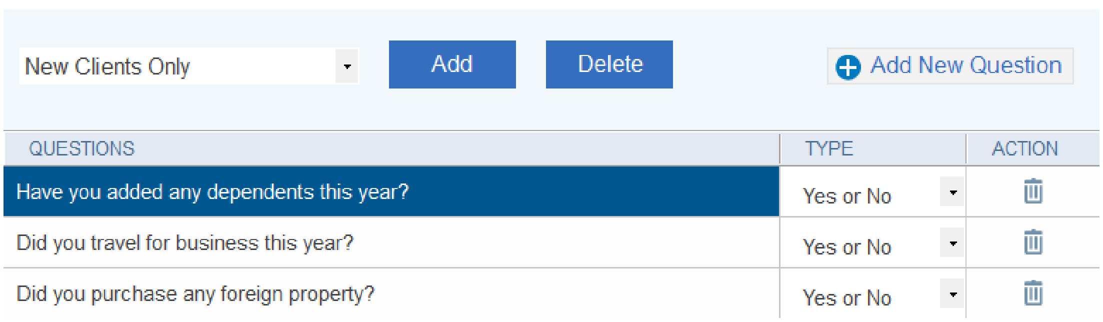
3. The “New Questionnaire” window displays. Enter name of new questionnaire template (e.g., “New Clients Only”):



4. Click the “OK” button; the new questionnaire template is ready to be populated with questions:

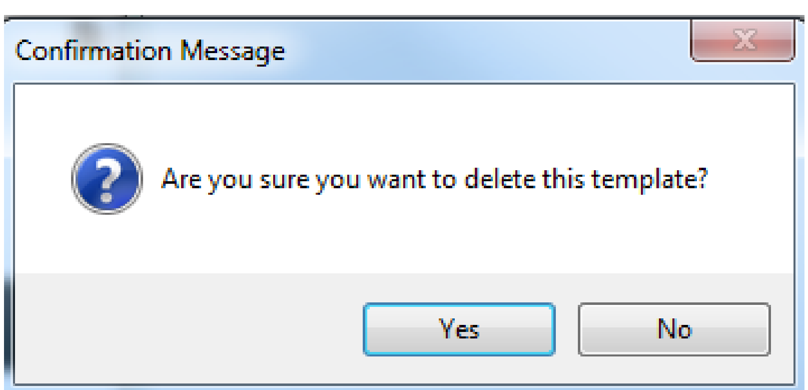


5. Add new questions and their corresponding response types.
6. Click the “Done” button; the template is added to the drop-down menu of existing questionnaires:



Deleting a Questionnaire Template

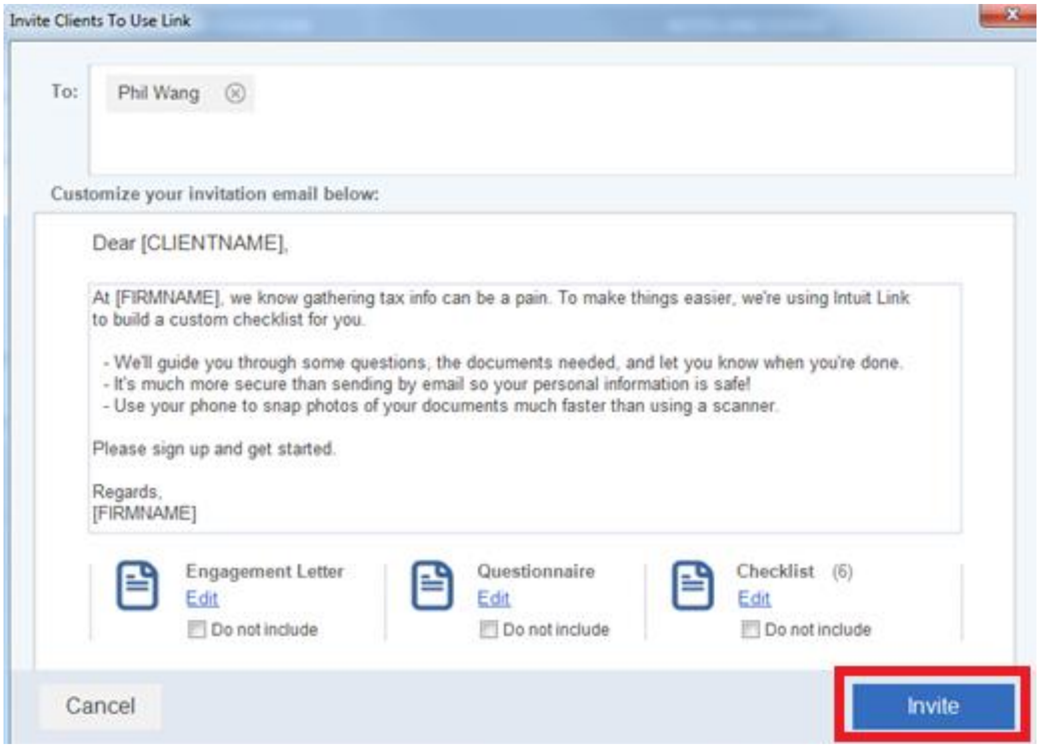
1. Select the questionnaire to be deleted from the drop-down menu.
2. Click the “Delete” button; the “Confirmation Message” window displays:



3. Click the “Yes” button; the questionnaire template is deleted from the menu.

Sending the Questionnaire

1. Make all necessary changes to the questionnaire (add question, delete question, etc.).
2. Click the “Done” button in the “Edit Questionnaire” window; the “Invite Clients to Use Link” window displays.



3. Click the “Invite” button in the “Invite Clients to Use Link”:

The questionnaire is sent to the client.