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Description automatically generated***Logo, company name

Description automatically generated*** ***Opportunities-Obstacles Quotient (QO2) Profiles on TMS Global   
via the TMSDI Bureau service***

To help our team deal with your processing requirements as efficiently as possible, and facilitate compliance with GDPR and associated policies, please complete all of the following information about your Opportunities-Obstacles Quotient (QO2)Profile Programme and return to [bureau@tmsdi.com](mailto:bureau@tmsdi.com).

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| --- | --- | --- | --- |
| **Project Title/Team Name** |  | **Accredited Facilitator(s) for this programme** |  |
|  |  | **Today’s date** |  |
|  |  | 1. **Date on which the briefing\* will be sent to participants** |  |
|  |  | 1. **Date on which participant accounts and Questionnaires will be set-up on TMS Global (this will be done on the same date as step 1 if step 1 is fulfilled by TMSDI)** |  |
|  | **Processing timeline:** | 1. **Date by which participants need to complete Questionnaires** |  |
|  |  | 1. **Date that you need these Profiles** |  |
|  |  | 1. **Programme Date (the date you are using these Profiles)** |  |

*\* It’s not possible to send detailed contextual information via TMS Global as all emails are standard, therefore a briefing should be sent to all participants prior to them receiving their activation email from TMS Global. This briefing should include context, deadlines and instructions for completion, and any guided reading instructions if you are providing automatic access to Profiles.*

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| **Data Protection** As the data controller, it is your responsibility to ensure that you comply with the terms of The General Data Protection Regulation (GDPR) with regard to Profile results – including processing, storage, retention and access. You can find out more about your responsibilities at [www.ico.org.uk](http://www.ico.org.uk) . If you are located outside the United Kingdom but within the EU, or you process personal data which belongs to EU citizens, you must comply with the GDPR. TMSDI endeavour to be GDPR compliant and, in relation to Profile processing, act as a data processor – please see our Privacy Policy at <https://www.tmsdi.com/privacy-policy>  Your attention is also drawn to our Data Processing Agreement which has been signed by your organisation. If you need a copy of this you can request this by emailing privacy@tmsdi.com. This Agreement outlines the default arrangements in place for TMSDI to act as the data processor where we process Profiles on your behalf, and by submitting this form you are agreeing to these conditions which your organisation has signed up for. If your organisation requires different arrangements for data processing, or you are unsure whether your organisation has a current data processing agreement in place, please contact us at [privacy@tmsdi.com](mailto:privacy@tmsdi.com) Note that we are unable to process Profiles on your behalf unless there is a signed data processing agreement in place.  **IMPORTANT** Please note that to help retain the privacy of those who are receiving their Profile, our policy is NOT to include participant names on invoices. Your invoice will quote the Programme Title/Team Name and Programme Date as stated above. If you DO require participant names on the invoice for this programme, please confirm here: **I DO require participant names on the invoice for this programme**  Please ensure that you complete the invoicing information at the end of this form. Any missing information may result in a delay to your processing request being actioned. |

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| **Setting-up Participants**  **Step 1 as noted above, before your programme is set-up on TMS Global, a briefing email must be sent to your participants so that they are aware to expect emails from TMS Global, the action they must take and any deadlines they need to be aware of.**  We recommend that TMSDI sends the standard briefing email a copy of which you have been provided with. This will allow the task to be incorporated into the Bureau workflow when setting up the programme on TMS Global, and help avoid any delays. If you require a more bespoke email to be sent, we recommend that you send this to ensure it fulfils your needs, alternatively please provide a copy of the email that we should send on your behalf when you return this form.  **Standard briefing** to be sent out by TMSDI: Yes  No  If yes, please state Date:  and time  that you would like this to be sent (shortly after sending this we will also set up accounts and Questionnaire Tasks on TMS Global)  If no, please state Date:  and time  that you would like the participants’ TMS Global accounts and Questionnaire Tasks to be set up (this must be **after** the date/time that you will send the briefing as participants will receive access emails and notifications from TMS Global)  **Reminders** to be sent out by TMSDI: Yes  No  If yes, please state Date:  and time  that you would like these to be sent  ***NB Briefings, set-up and reminders can only be sent by TMSDI Monday to Friday, 9.00am-5.00pm UK time.*** |
| **Please note here any other details we should be aware of:** |

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| **Participant (Respondent\_ Information** | | |
| **Email Address** | **First Name** | **Last Name** |
|  |  |  |
| **If you prefer you can send this information as an Excel Spreadsheet – splitting the information across 3 columns as above.**  NOTE: When Questionnaires are set-up on TMS Global they are added to your account as subscriptions. These subscriptions are then allocated to each of your respondents to enable them to complete the Questionnaire. Each subscription is a chargeable item which will be added to your invoice. If a respondent is no longer attending, provided they have not yet completed the Questionnaire, it is possible to reallocate the subscription to a new respondent in the future, however the subscription will still be invoiced with this programme. | | |

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| **Profile format**  **Bureau Online:** Our *Carbon Lite™* optionThese Profiles will be delivered as PDFs only on TMS Global |
| **Profiles delivered Online to your Participants**  Profiles can be delivered directly from TMS Global to your participants:   * **Automatic** – shortly after Questionnaire completion the Profile will be available online for both you and your participant to access (in the language the Questionnaire was completed in) – there is no additional charge for this option. * **Delayed** – you will be able to view Profiles, but access will be withheld from participants until a date chosen by you – you can provide this access yourself via your own log-in or TMSDI can do this on your behalf **(note there is a charge for this service)**   I require:  Automatic access as outlined above  Delayed access – If required, I will provide access myself via my own log-in as outlined above (we can provide details of how you can do this)  Delayed access – I require TMSDI to provide access on my behalf, as outlined above. If you would like us to do this on your behalf please state Date:       and time       that you would like access to be provided from.  ***NB TMSDI can only provide access Monday to Friday, 9.00am-5.00pm UK time.*** |
| **Advanced Reporting**  Please tick here if you would like advanced reporting for this programme (high-level team maps illustrating key Profile data)  None required |

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| **Invoicing details**  **IMPORTANT** – TMSDI’s policy is to invoice the organisation of the accredited network member who is booking this Profile processing. Any third party invoicing MUST be agreed in writing, in advance, with TMSDI’s Finance Manager, and will require a Purchase Order.  **Contact Name**       **Contact Email**  **Organisation to be invoiced**  **Invoice Address**  **Cost Centre/Purchase Order No** |

***If you have any queries, please contact*** [***bureau@tmsdi.com***](mailto:bureau@tmsdi.com) ***or +44 (0) 1904 464 520***