MHS®

User Manual

MHS ONLINE ASSESSMENT CENTER+

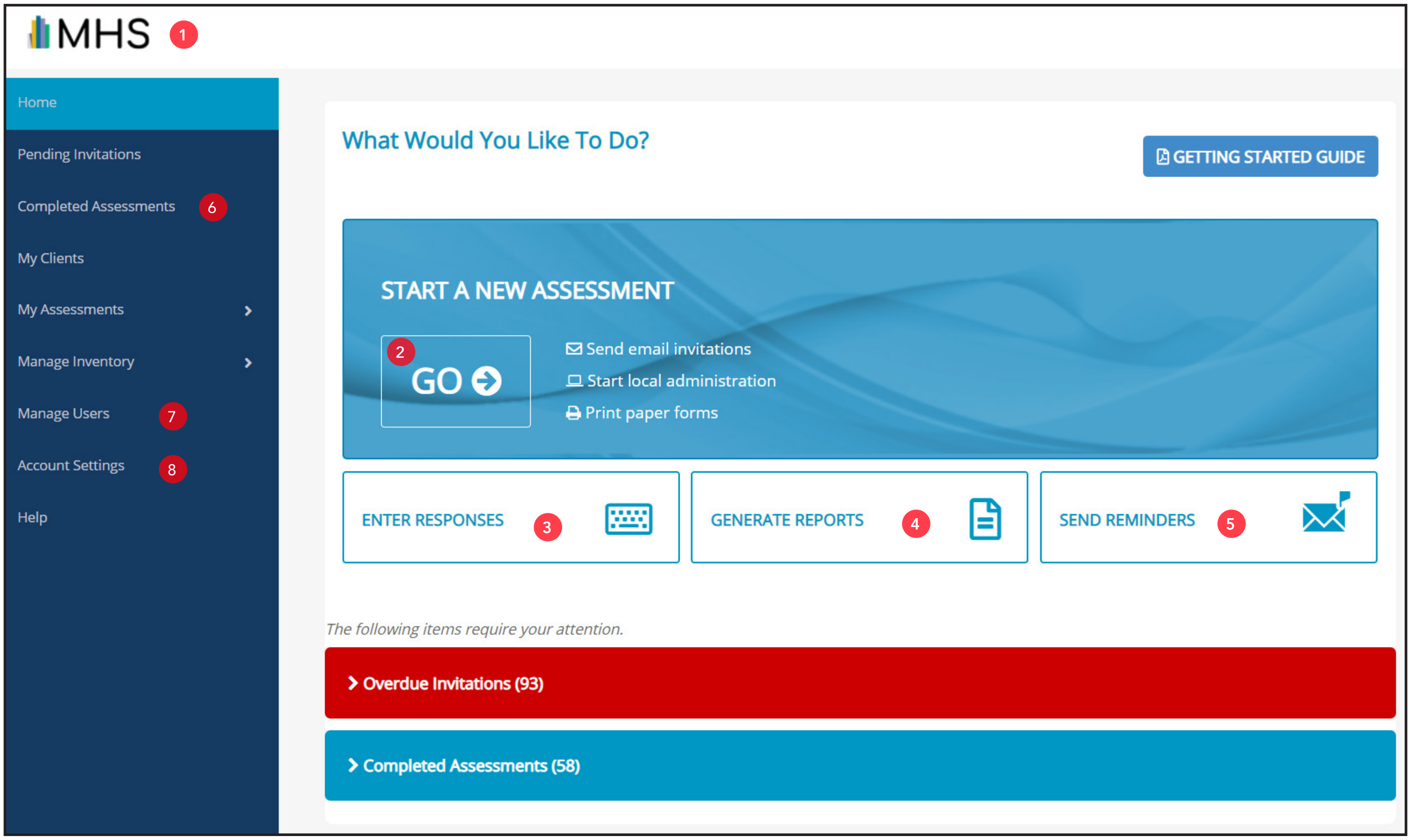
assess.mhs.com

Psychological Assessments Australia

// TABLE OF CONTENTS

THE DASHBOARD

The Dashboard is your Home page. Upon logging in, this is the first page you will see.



1 **MHS logo** — Click to return to the dashboard from any page within the assessment center.

2 **Express Launcher** — Click to start a new administration for any assessment, using any method.

3 **Enter Responses** — Click to enter responses for any paper form.

4 **Generate Reports** — Click to generate a report from a completed assessment.

5 **Send Reminders** — Click to send reminders to complete an assessment.

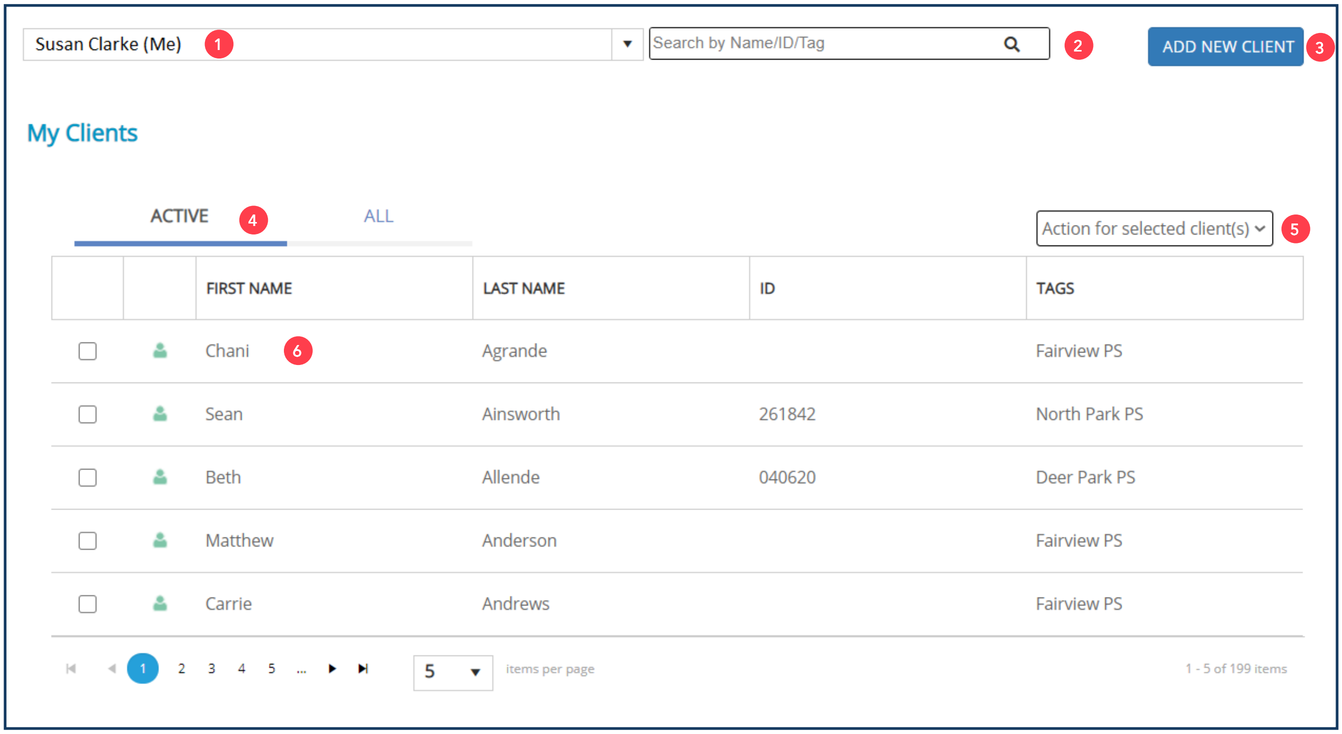
6 **Completed Assessments** — Click to view and generate reports. ***If you have upgraded from the old assessment center, you will find your reports and completed assessments here.***

7 **Manage Users** — Click to add and manage sub-user accounts.

8 **Account Settings** — Click to change your password, enable and disable assessments, set notifications, etc.

MY CLIENTS

All assessment records on the MHS Online Assessment Center+ are linked to a Client Profile. To add, organize, and manage client profile information, click **My Clients** in the left menu.



1 **User menu** — Your own clients are displayed in the table by default. To view the clients of one of your sub-users, select their name from the dropdown menu (See *Admin Client Management* on page 25 for more information).

2 **Search bar** — Enter any of the following details to search for a client: First Name, Last Name, Client ID, or tag.

3 **Add new client** — Click here to enter new client demographic information. A client must first be added to the MHS Online Assessment Center+ before an assessment can be administered to that individual.

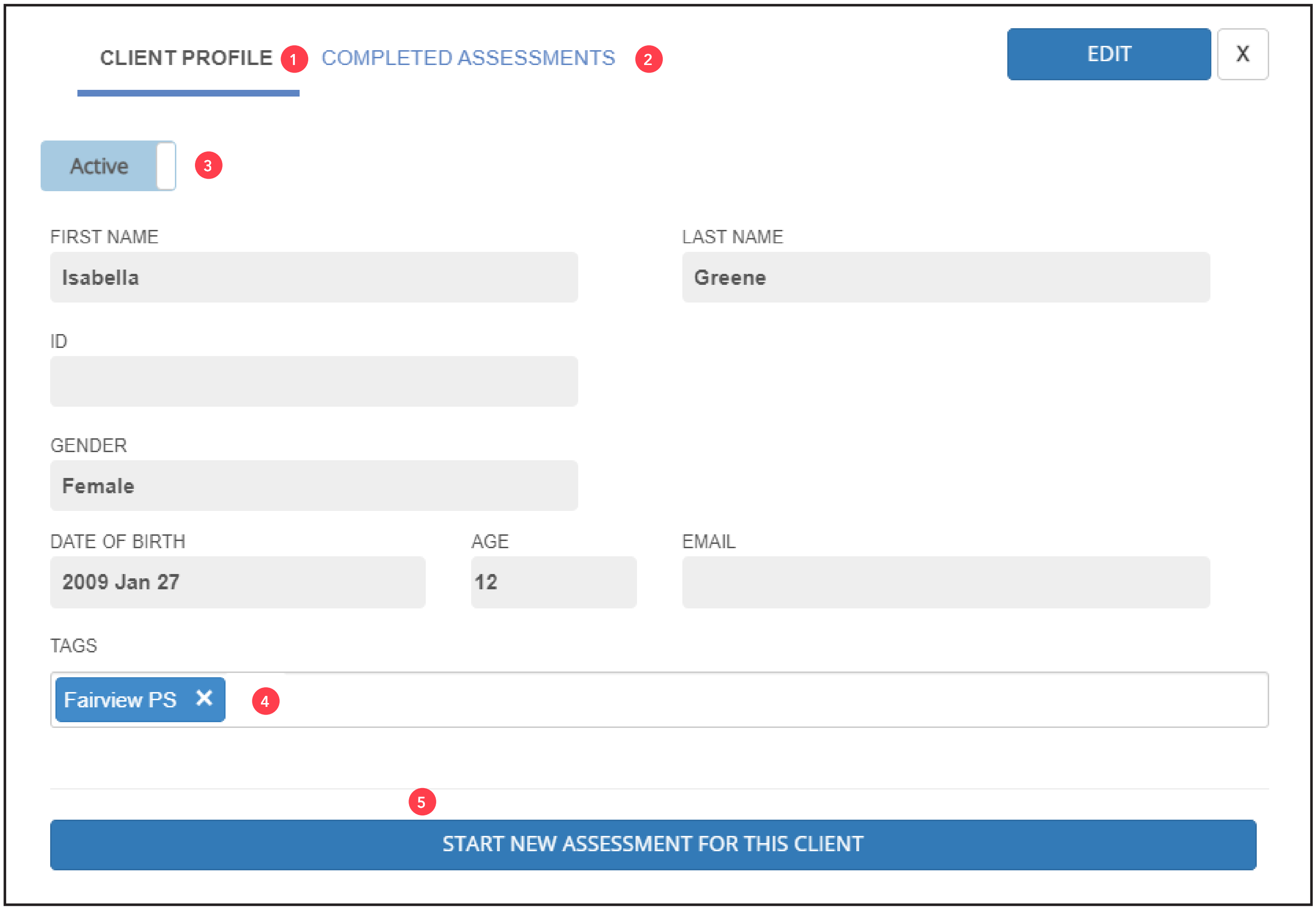
4 **Active tab** — Click here to view only those client profiles that you are currently working on. Click the **All** tab to display <u>all</u> client profiles, both active and non-active.

5 **Action dropdown menu** — Select clients by clicking the checkbox, then use this dropdown menu to move the selected clients back and forth between the **Active** and **All** tabs. You can also use this dropdown menu to transfer clients between sub-users (See *Admin Client Management* on page 25 for more information).

6 **Client name** — Click a row to view or edit the client's demographic information, or begin a new assessment for the client (See *Client Profile* on Page 3 for more information).

CLIENT PROFILE

Client profiles can be viewed from the My Clients table. Clicking a client's name will open that client's profile.



1 **Client profile tab** — Click to display the client's demographic information. Click **EDIT** to change the demographic information for the client.

2 **Completed assessments tab** — Click to see a list of all the completed assessments for the client.

3 **Active status** — Indicates the status of the client. Click **Active** to change the status to *Inactive*.

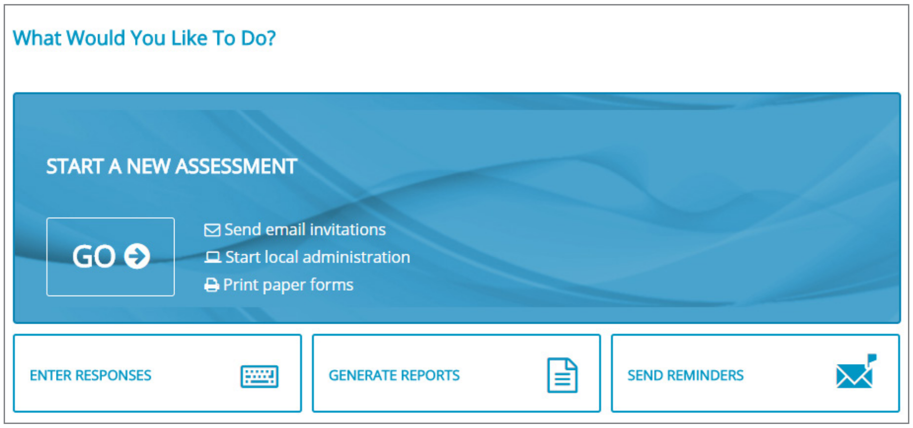
4 **Tags** — Use tags, such as the name of a school or grade level, to identify or sort clients. To add a tag, enter the name of the tag in the text box, then press **Enter** to list the tag on the client profile. *NOTE:* Clients can have more than one tag.

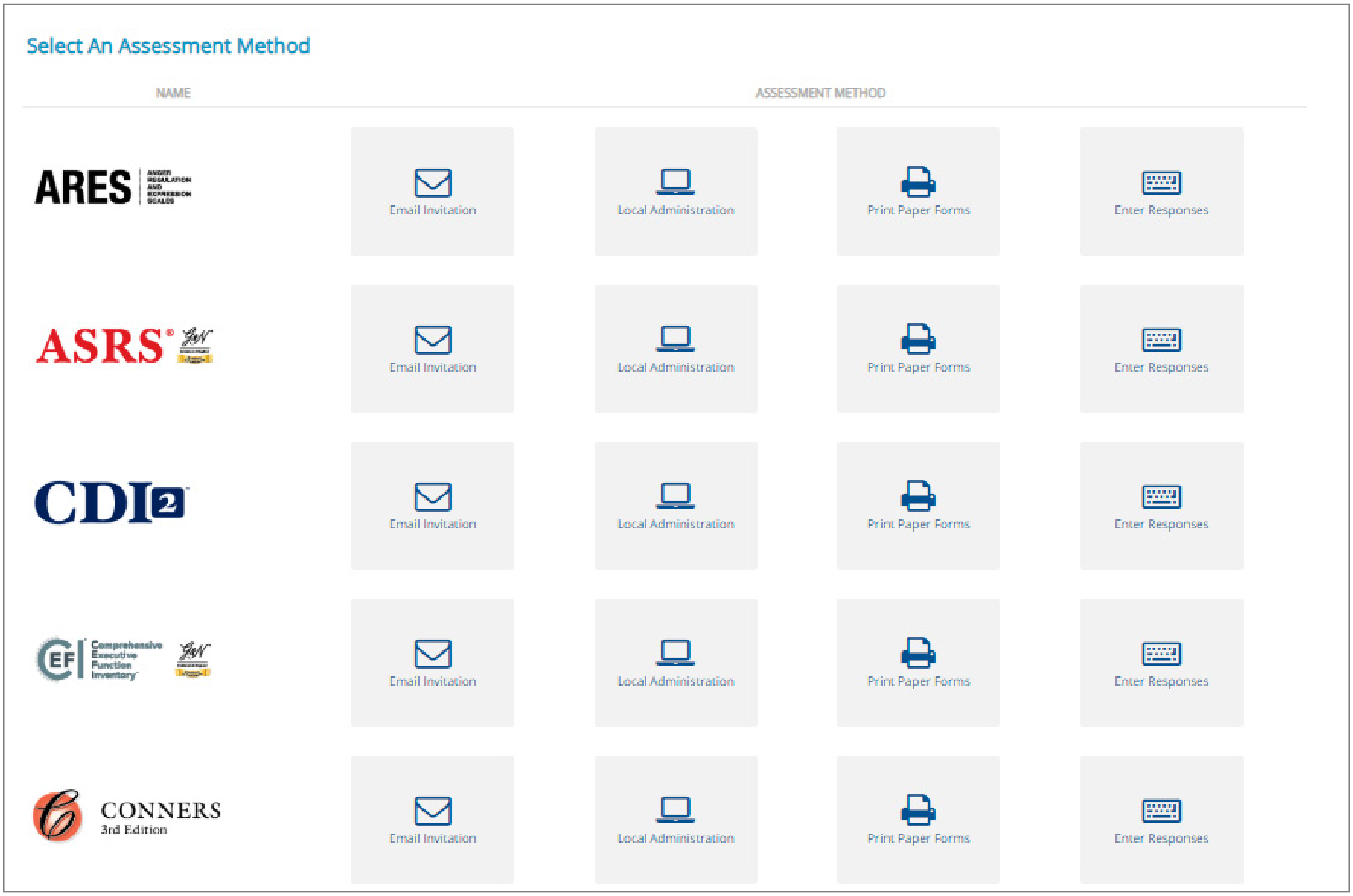
5 **Start new assessment for this client** — Click to begin a new administration for the selected client profile.

EXPRESS LAUNCHER

The Express Launcher is available on the Dashboard. The most common tasks can be quickly accessed through the Express Launcher.

1. Click **GO** to send a rater an email invitation to complete an assessment, begin a local administration, print a paper form, or enter responses.
2. Click the desired assessment method beside the associated assessment name and follow the subsequent steps.





PRINT PAPER FORMS

Access PDF versions of assessments to print and distribute to clients. Use the portal to score the responses automatically.

1. Select **Print Paper Forms** for the desired product on the Express Launcher page.
2. Click **Print Form** to open the PDF form. The PDF form will open in a separate tab within the browser.
3. Print and distribute to your clients.

Upon completion of the form, click **Enter Responses** to enter the assessment information on the portal.

Print Paper Forms

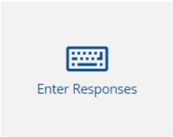
ASRS

Uses will not be consumed by printing.

Please ensure that you send the form with the appropriate age range for your client.

DESCRIPTION	RATER	LANGUAGE	REMAINING	
ASRS (2-5 Years)	Parent	English	20	Print Form
ASRS (2-5 Years)	Teacher/Childcare Provider	English	23	Print Form
ASRS (2-5 Years) Short Form	Parent/Teacher/Childcare Provider	English	21	Print Form
ASRS (6-18 Years)	Parent	English	22	Print Form
ASRS (6-18 Years)	Teacher	English	25	Print Form
ASRS (6-18 Years) Short Form	Parent/Teacher	English	23	Print Form
ASRS (2-5 Years)	Parent	Spanish	24	Print Form
ASRS (2-5 Years)	Teacher/Childcare Provider	Spanish	25	Print Form
ASRS (2-5 Years) Short Form	Parent/Teacher/Childcare Provider	Spanish	24	Print Form
ASRS (6-18 Years)	Parent	Spanish	25	Print Form
ASRS (6-18 Years)	Teacher	Spanish	25	Print Form
ASRS (6-18 Years) Short Form	Parent/Teacher	Spanish	25	Print Form

ENTER RESPONSES



You can automatically score paper forms by entering responses for completed forms within the portal.

1. Select **Enter Responses** for the desired product on the Express Launcher page.
2. Click **Select** for the required form from one of these two sections:
   - Saved Drafts - continue entering responses for a saved paper form
   - New Forms - select a new form

ASRS Enter Responses For Paper Forms

Saved Draft

CLIENT	FORM	RATER	LAST UPDATED	
Mary Andrews	ASRS (6-18 Years)	Parent	2019 Sep 10	Select

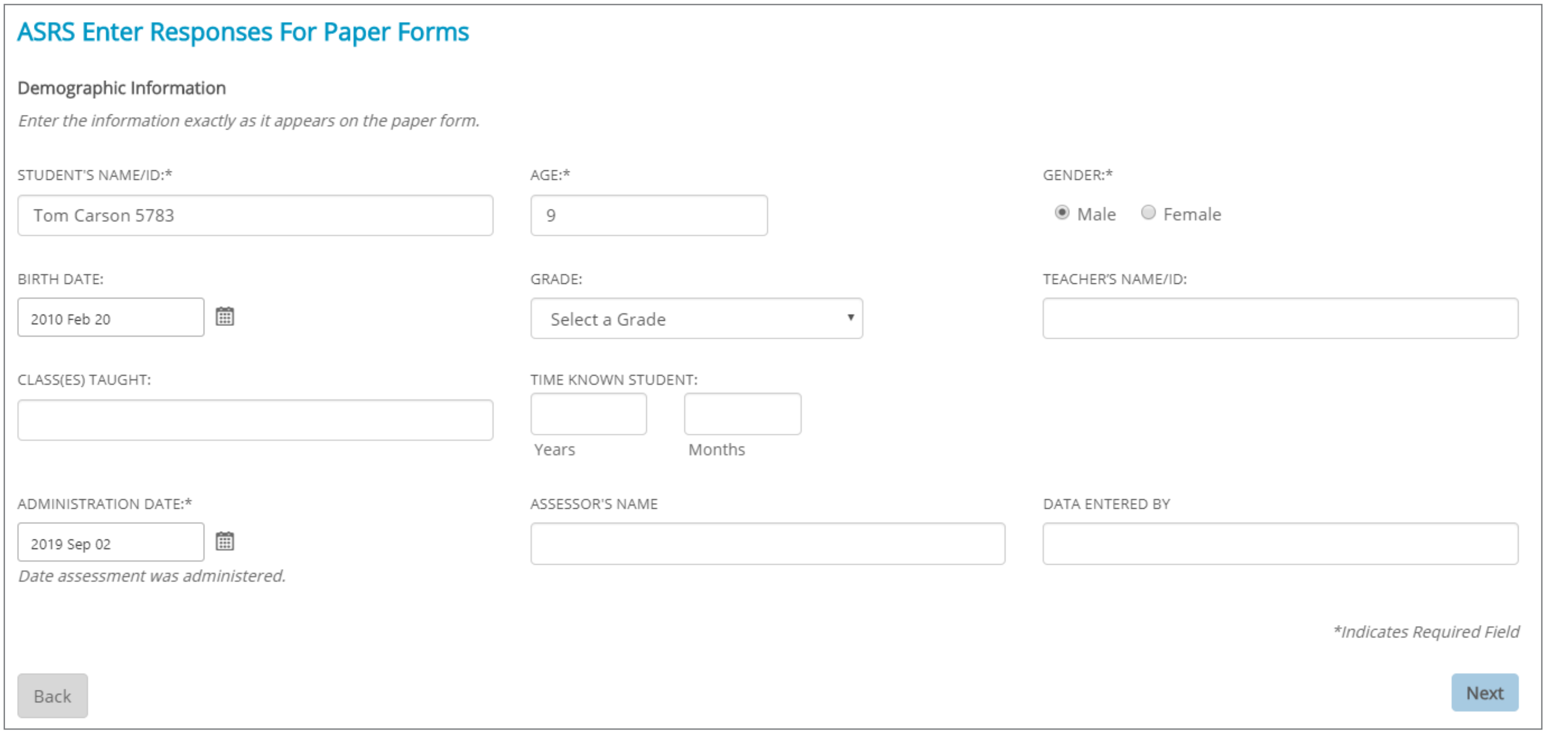
Page size: 10 — 1 items in 1 pages

New Forms

DESCRIPTION	RATER	LANGUAGE	REMAINING	
ASRS (2-5 Years)	Parent	English	20	Select
ASRS (2-5 Years)	Teacher/Childcare Provider	English	23	Select
ASRS (2-5 Years) Short Form	Parent/Teacher/Childcare Provider	English	21	Select
ASRS (6-18 Years)	Parent	English	22	Select
ASRS (6-18 Years)	Teacher	English	25	Select
ASRS (6-18 Years) Short Form	Parent/Teacher	English	23	Select

3. Select the checkbox for the applicable client and then click **Next**.
   - For a *new client* who has not been added to the assessment center, click **Add New Client**.
4. Confirm selected client information and click **Next**.

5. Enter demographic information exactly as it is entered on the completed paper form. Click **Next** to proceed.
   - NOTE: Administration Date is required


ASRS Enter Responses For Paper Forms

Demographic Information

Enter the information exactly as it appears on the paper form.

STUDENT'S NAME/ID:*
Tom Carson 5783

AGE:*
9

GENDER:*
Male Female

BIRTH DATE:
2010 Feb 20

GRADE:
Select a Grade

TEACHER'S NAME/ID:

CLASS(ES) TAUGHT:

TIME KNOWN STUDENT:
Years Months

ADMINISTRATION DATE:*
2019 Sep 02
Date assessment was administered.

ASSESSOR'S NAME

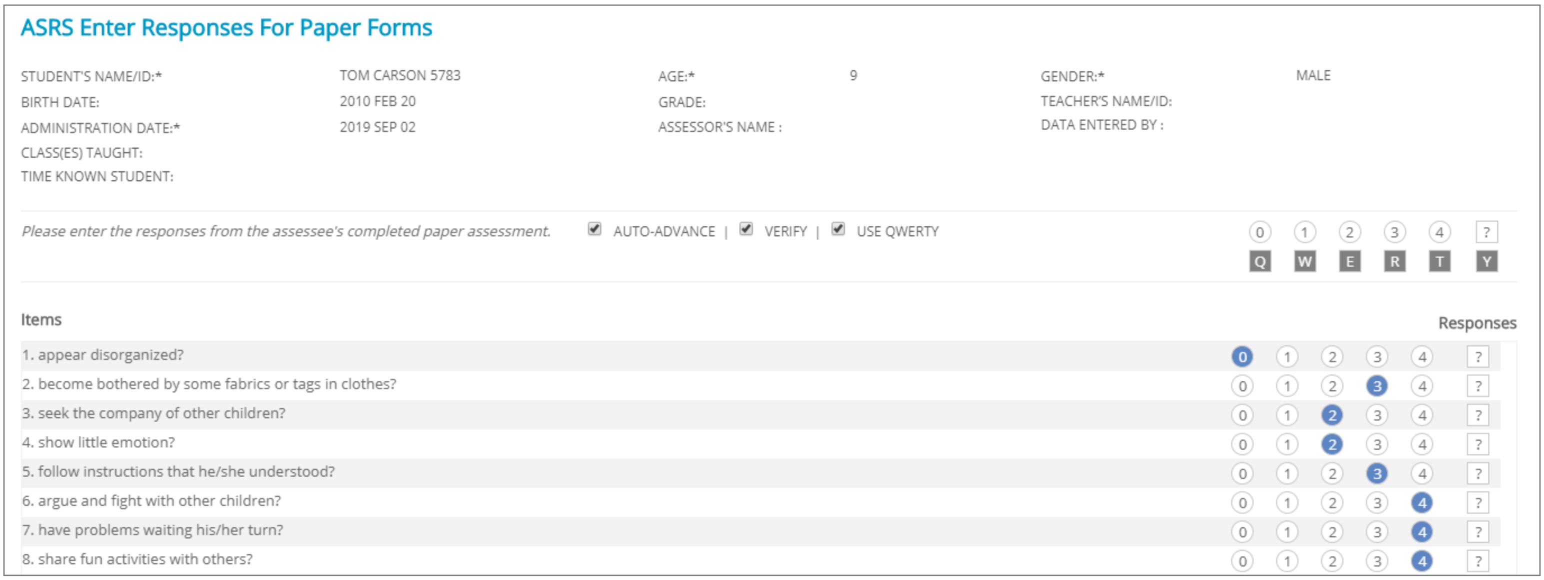
DATA ENTERED BY

**Indicates Required Field*

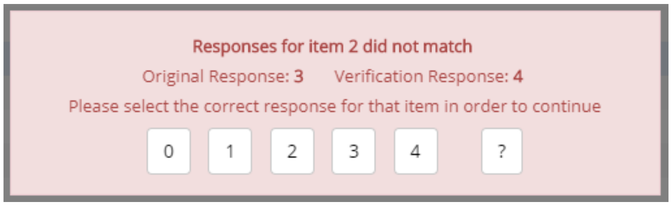
Back Next

6. Enter the responses from the completed paper assessment. By default, the following options will be preselected:
    - **Auto-advance:** After a response is entered, the form will automatically advance to the next item.
    - **Verify:** After the initial entry of responses, you must enter responses a second time as verification of entry. IF an entry does not match, a Verification Alert will appear in the center of the screen. The Verification Alert requires you to click the response (using a mouse/touch-screen, NOT a keyboard) for the item that does not match the initial entry.
    - **Use QWERTY:** Allows you to enter responses with Q-W-E-R-T-Y letters on your keyboard. Q-W-E-R-T-Y entry represents 0-1-2-3-4-? entry.

    NOTE: De-select the checkbox to turn the above options off.
7. When all responses have been entered and verified, click **Next**.

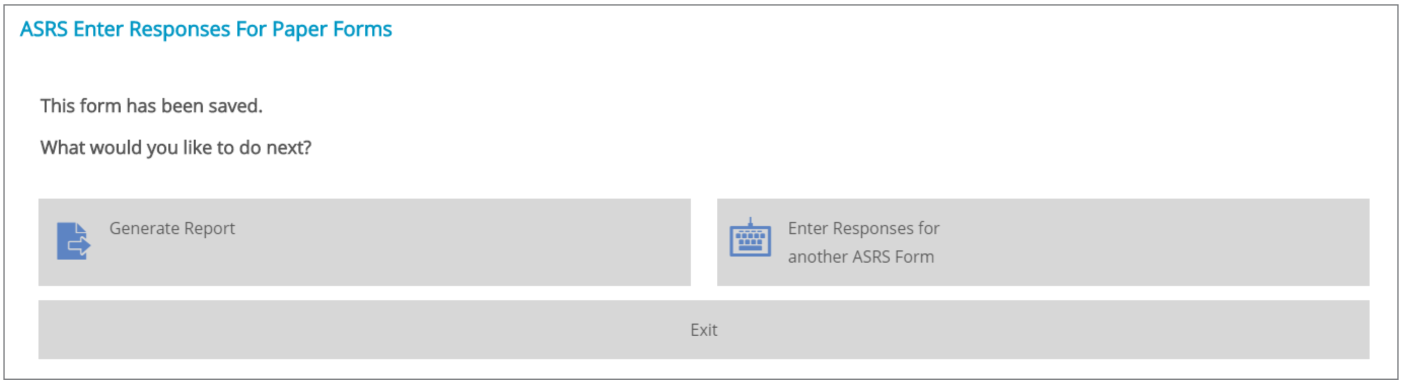


Enter Responses for Paper Form

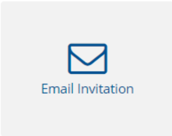


Verification Alert

8. Once the form is saved, you can continue to score the report by clicking **Generate Report**; continue entering responses by clicking **Enter Responses for another Form**; or click **Exit** to return to the Product Landing page.

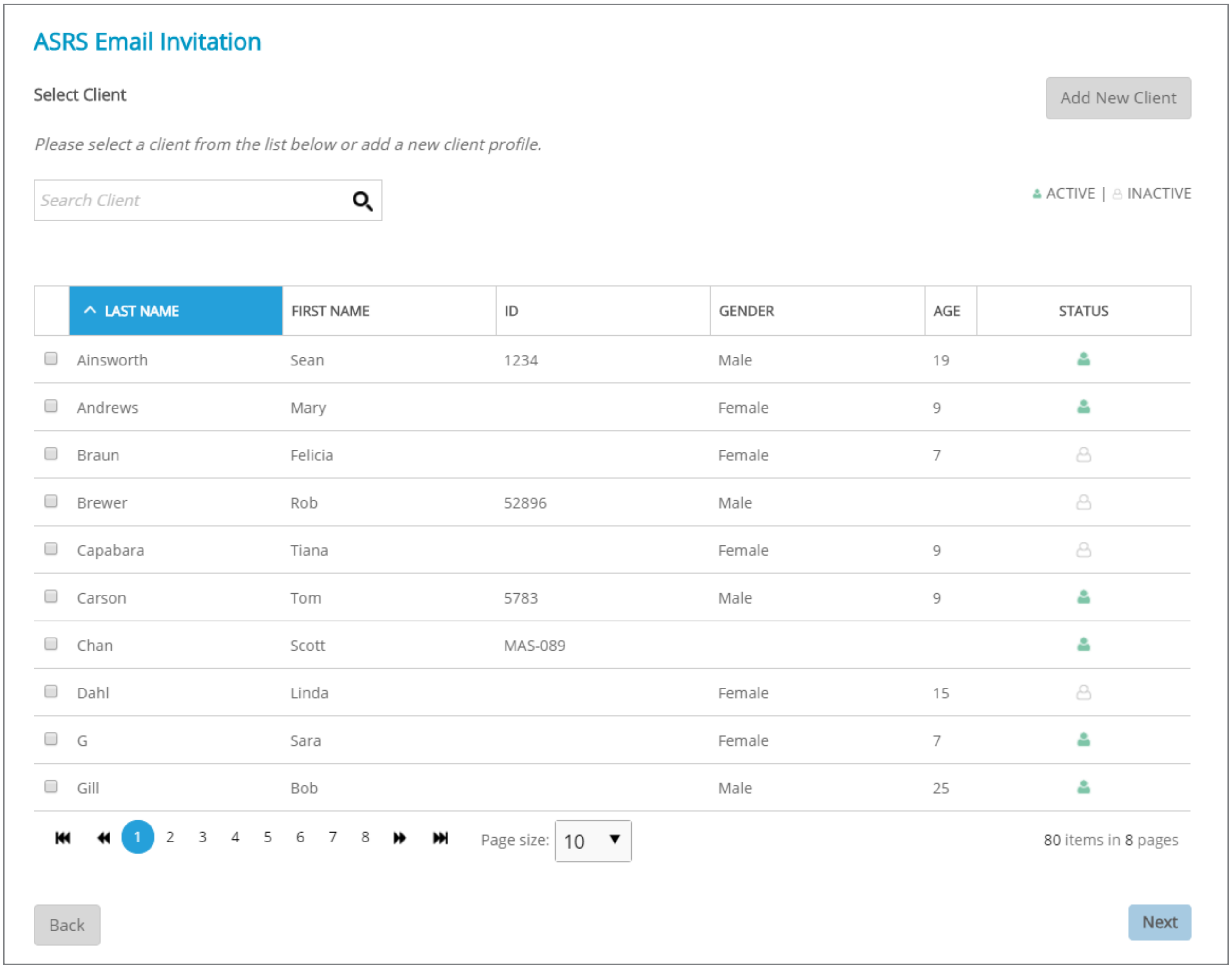


EMAIL ASSESSMENT INVITATIONS



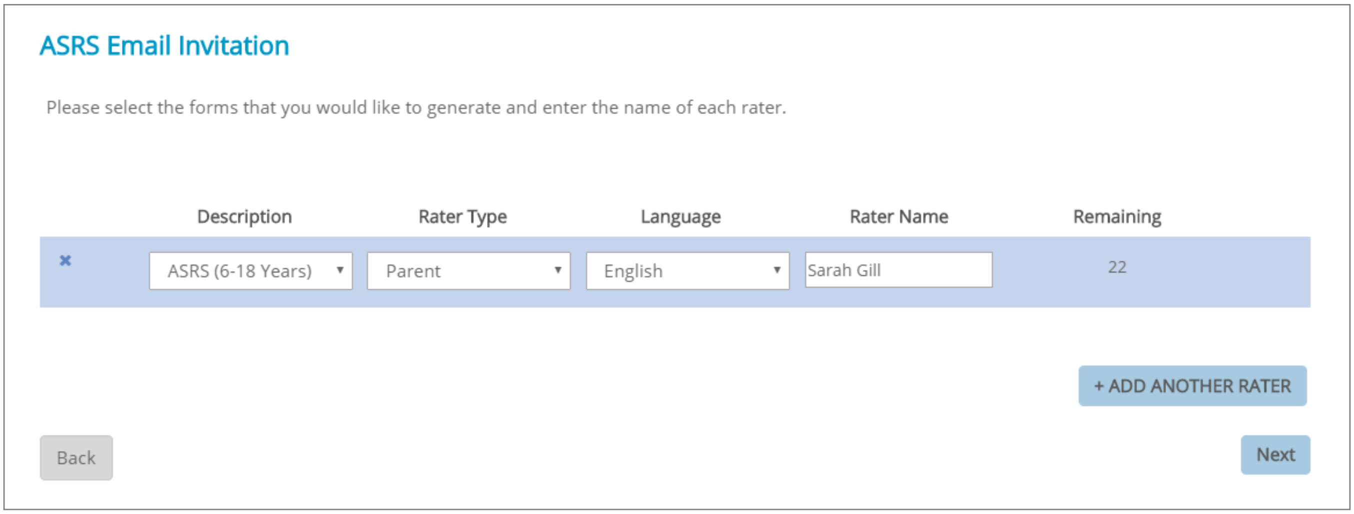
The Email Invitation assessment method allows you to create assessment links for remote administration.

1. Select **Email Invitation** for the desired product on the Express Launcher page. A list of clients appears.
2. Select or Add a new clien**t.**
   - For an existing client, select the client name and click Next.
   - For a *new client*, click **Add New Client**.

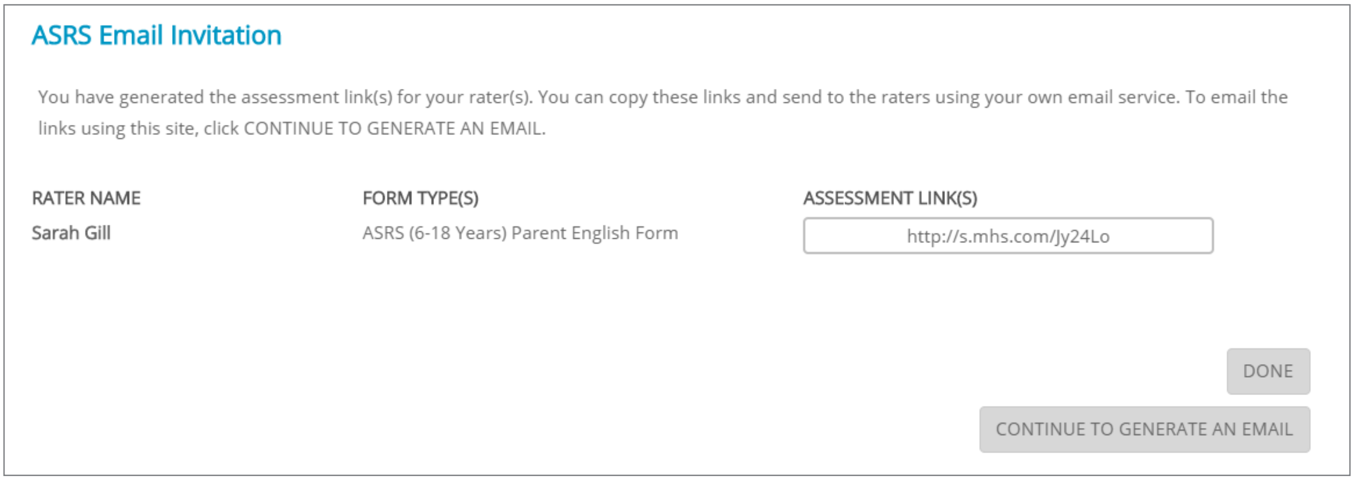


LAST NAME	FIRST NAME	ID	GENDER	AGE	STATUS
Ainsworth	Sean	1234	Male	19	
Andrews	Mary		Female	9	
Braun	Felicia		Female	7	
Brewer	Rob	52896	Male		
Capabara	Tiana		Female	9	
Carson	Tom	5783	Male	9	
Chan	Scott	MAS-089			
Dahl	Linda		Female	15	
G	Sara		Female	7	
Gill	Bob		Male	25	

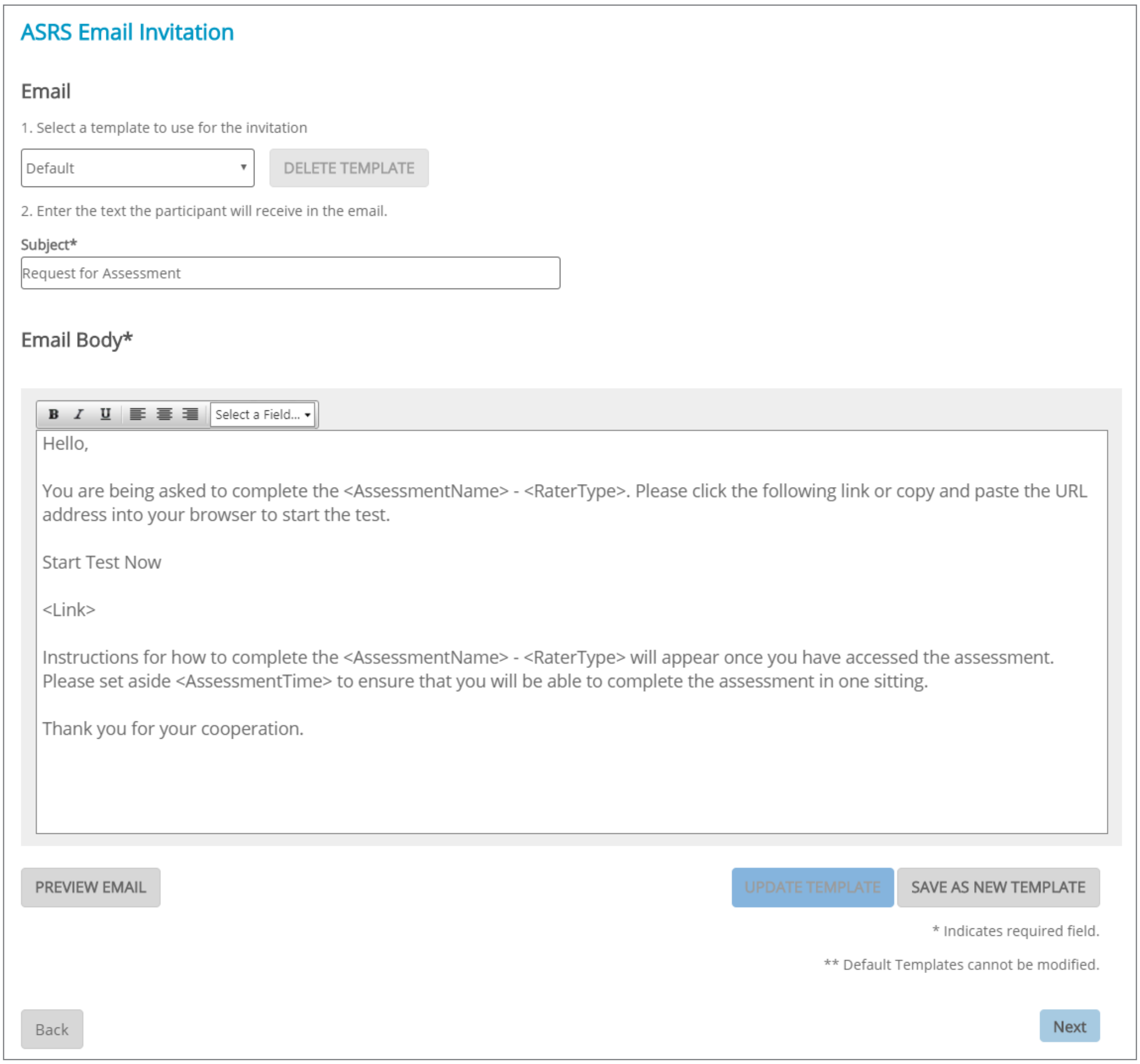
3. Review the Client Information, making changes as necessary. If it is correct, click **Save**.
4. Select the forms that you want to be completed and enter the name of each rater. Click **Next**.
    - To add additional raters to the assessment invitation, click **Add Another Rater.**



5. Review rater and form types. Click **Generate Links**.
6. The assessment links for your raters will be generated and displayed.
    - To send the assessment links using your own email service, copy and paste the links into your email. Click **Done** when finished.
7. To send the assessment links using the portal, click **Continue to Generate an Email**.

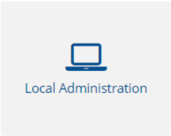


8. Add the rater/client email addresses. Click **Next**.
9. A default email template will be displayed for the email invitation. Assessment links will automatically be added within "<Link>". You can edit the email message or leave as is. Click **Next** to proceed.
    - Save As New Template - saves the email content as a new template
    - Update Template - updates an existing email template from the template drop-down
    - Delete Template - removes an existing template from the email template drop-down



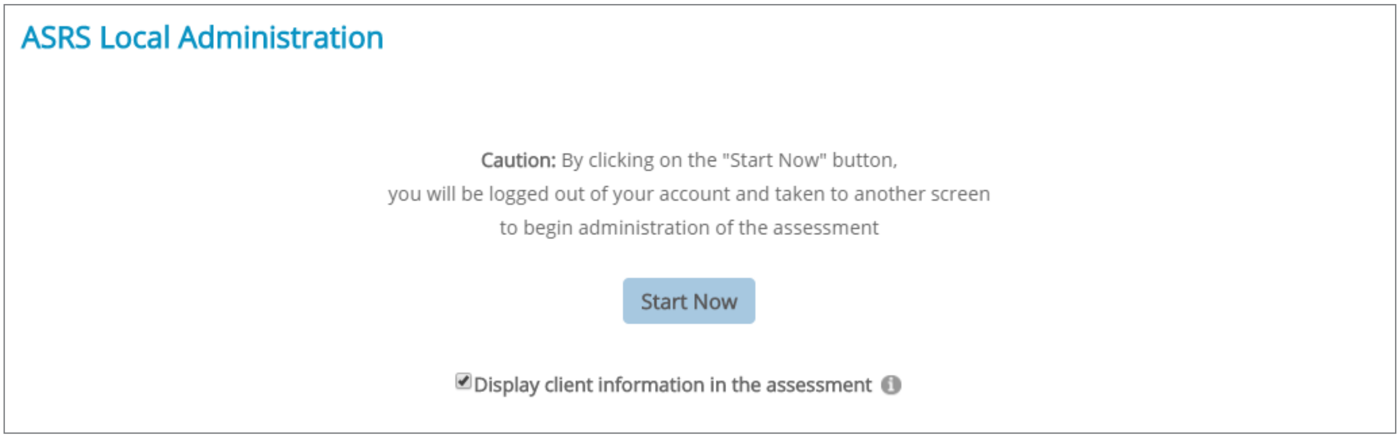
10. Review the outgoing invitations.
11. Click **Send Email**.
    - The email is sent out from noreply@mhs.com. If the rater or client does not receive the emailed invitation, ask them to check their spam folder.

LOCAL ADMINISTRATION



Use Local Administration to administer an assessment in person using your own computer.

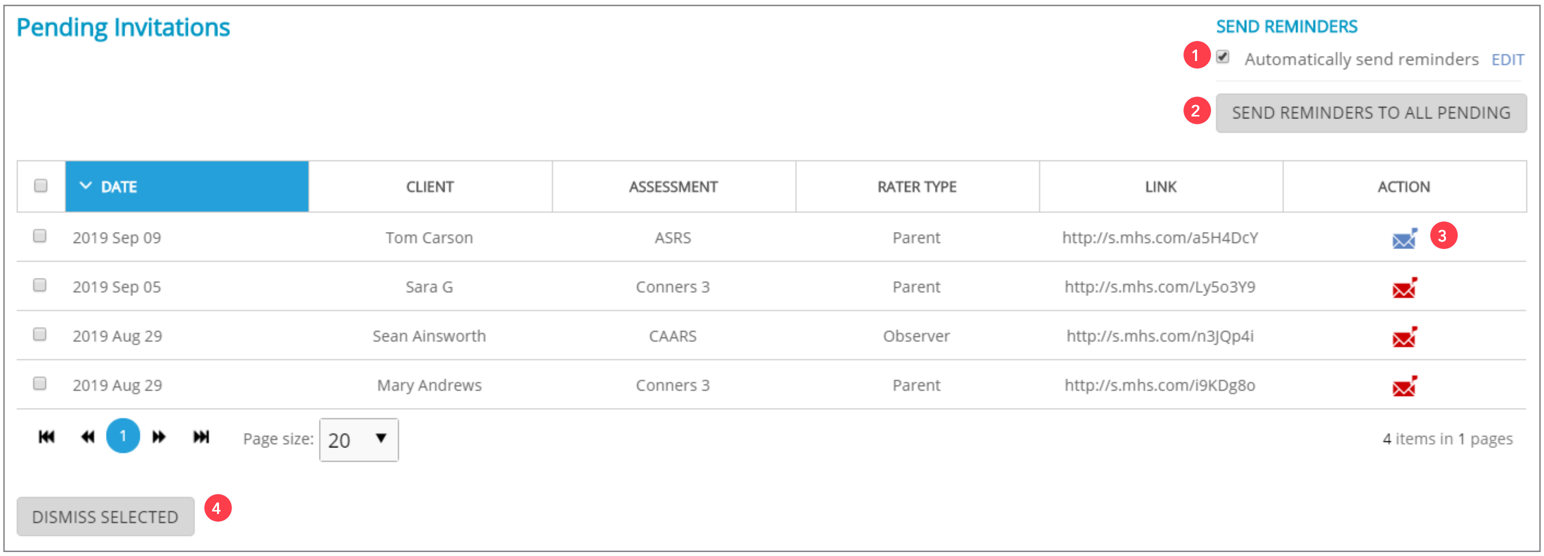
1. Select **Local Administration** for the desired product on the Express Launcher page. A list of available forms appears.
2. Click **Select** for the form that you want.
3. Select or Add a client.
    - For an *existing client*, select the client name and click **Next**.
    - For a *new client*, click **Add New Client**.
4. Confirm selected client information and click **Save**.
    - NOTE: The client's first & last name or ID are required fields.
5. Click **Start Now** to begin.
    - You will be automatically taken to the web version of the assessment. The system will also log you out of the assessment center to ensure your privacy.



PENDING INVITATIONS

Pending Invitations are assessments that have been emailed for completion, but are still not completed.

- Assessment links that were emailed to raters through the assessment center will have red or blue envelope icons in the ACTION column. *Pending Invitations* are indicated by a blue icon. *Overdue invitations* are indicated by a red icon.
- Click these envelope icons to send the rater a reminder to complete the assessment.
- **Overdue Invitations** - By default, assessment links sent using the assessment center will become *overdue* after 7 days. You can adjust the days a pending invitation becomes overdue by clicking **Account Settings** in the left menu.
- Assessment links that were sent using your own email service will have *no* icon in the ACTION column. To send email reminders to the rater for these pending invitations, you can copy and paste the assessment links from the table into your own email.



1 **Automatically send reminders** — Click the checkbox to automatically send an email reminder to pending invitations that become overdue. To edit the email template, click **Edit**.

2 **Send reminders to all pending** — Click to send an email reminder to *all* pending invitations that were sent using the assessment center.

3 **Send reminder icons** — Click an icon to send an email reminder to a rater or client. Blue icons represent pending assessments; red icons indicate overdue assessments.

4 **Dismiss selected** — Select the pending assessment links you want to remove from the table, and then click here.

VIEWING AND GENERATING REPORTS

All of your completed assessments and generated reports are displayed on the Completed Assessments page.

If your account has been upgraded from the old Assessment Center to the Online Assessment Center+, you will find all your generated reports and completed assessments on the Completed Assessments page. This includes any pending assessments that are completed after you have successfully upgraded your account.

To view your completed assessments:

1. Click **Completed Assessments** in the left menu.

   A table of your completed assessments appears.

Completed Assessments

Search for an assessment by Client or Assessment

ASSESSMENT DATE ↓	CLIENT	DESCRIPTION	RATER	ACTION
2019 Nov 21	Thomas Topaloglou	Conners 3 Parent English	Antonia Topaloglou	View Report
2019 Nov 20	Lanai Dyer	Conners 3 Parent English	Amanda Dyer	View Report
2019 Nov 20	Allen Boyes	Conners3 Full-Length Teacher	Maree Magnabosco	Generate Report
2019 Nov 12	Isabelle Hall	Conners 3 Teacher English	Joshua Tassone	Generate Report

2. Look in the RATER column to determine which rater completed the assessment.

3. To generate a report, click **Generate** in the ACTION column and then continue through the guided steps.

   - If this is the first time you are generating a report from that assessment, one form use will be deducted from your account.
   - ***However, if the assessment was completed from an invitation sent from the old Assessment Center, you will not be charged as the form use was previously deducted when you sent the invitation.***

4. To view a generated report, click **View Report** in the ACTION column and then continue through the guided steps.

ASSIGNING CLIENTS

> Note: The following only applies to assessments and reports transferred from the old Assessment Center. Any assessment that originates from the Online Assessment Center+ will have a client associated with it from the start.

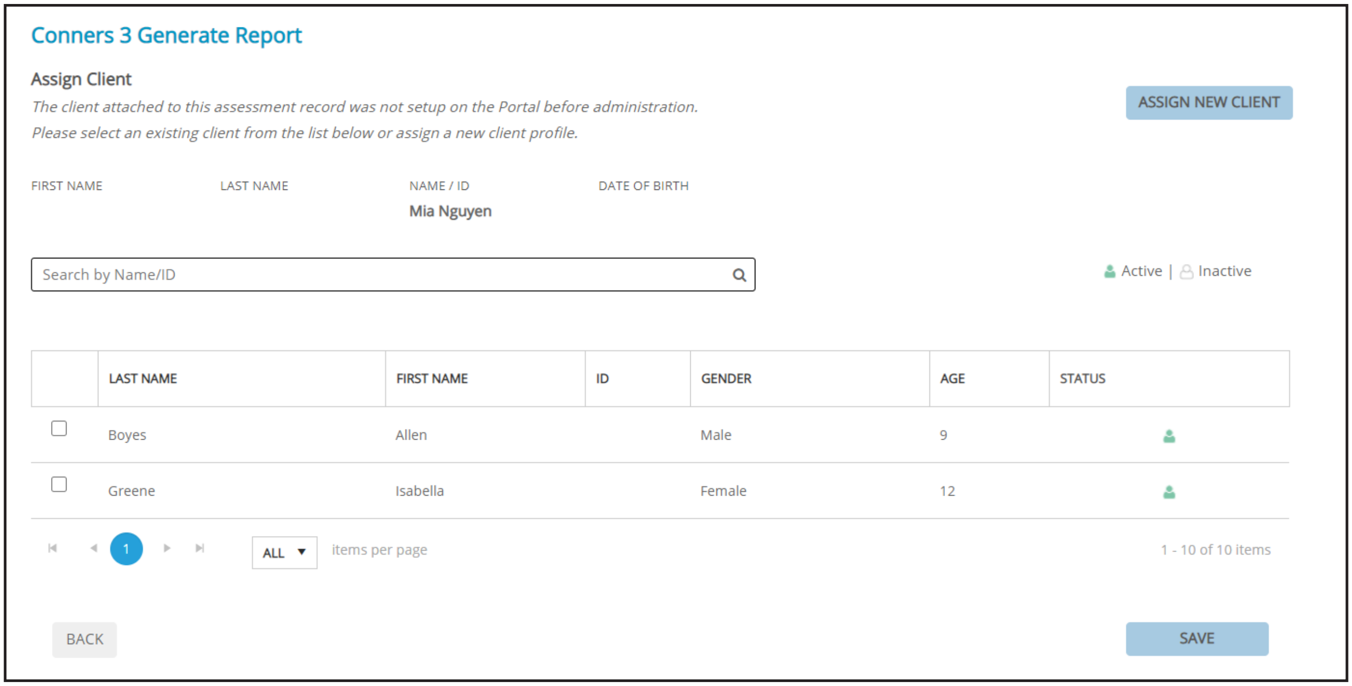
If you want to generate or view a report from the old Assessment Center, you must first assign a client to that report or assessment.

This step only needs to be done once and only applies to assessment data transferred from the old Assessment Center.

To assign a client to a completed assessment or report:

1. Click **Generate** or **View Report** on the Completed Assessments page.

   The Assign Client page opens.

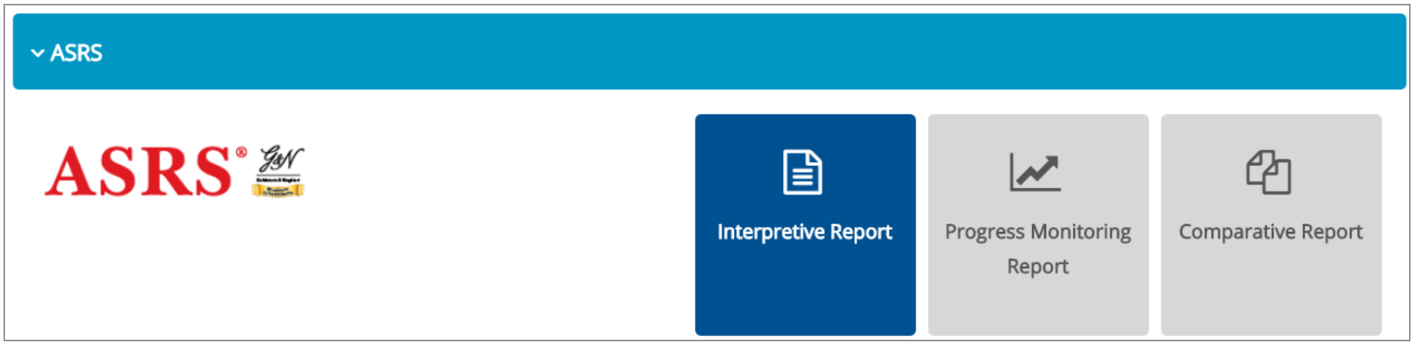


2. If you have already created a profile for the client, select their name from the list and then click **SAVE**.

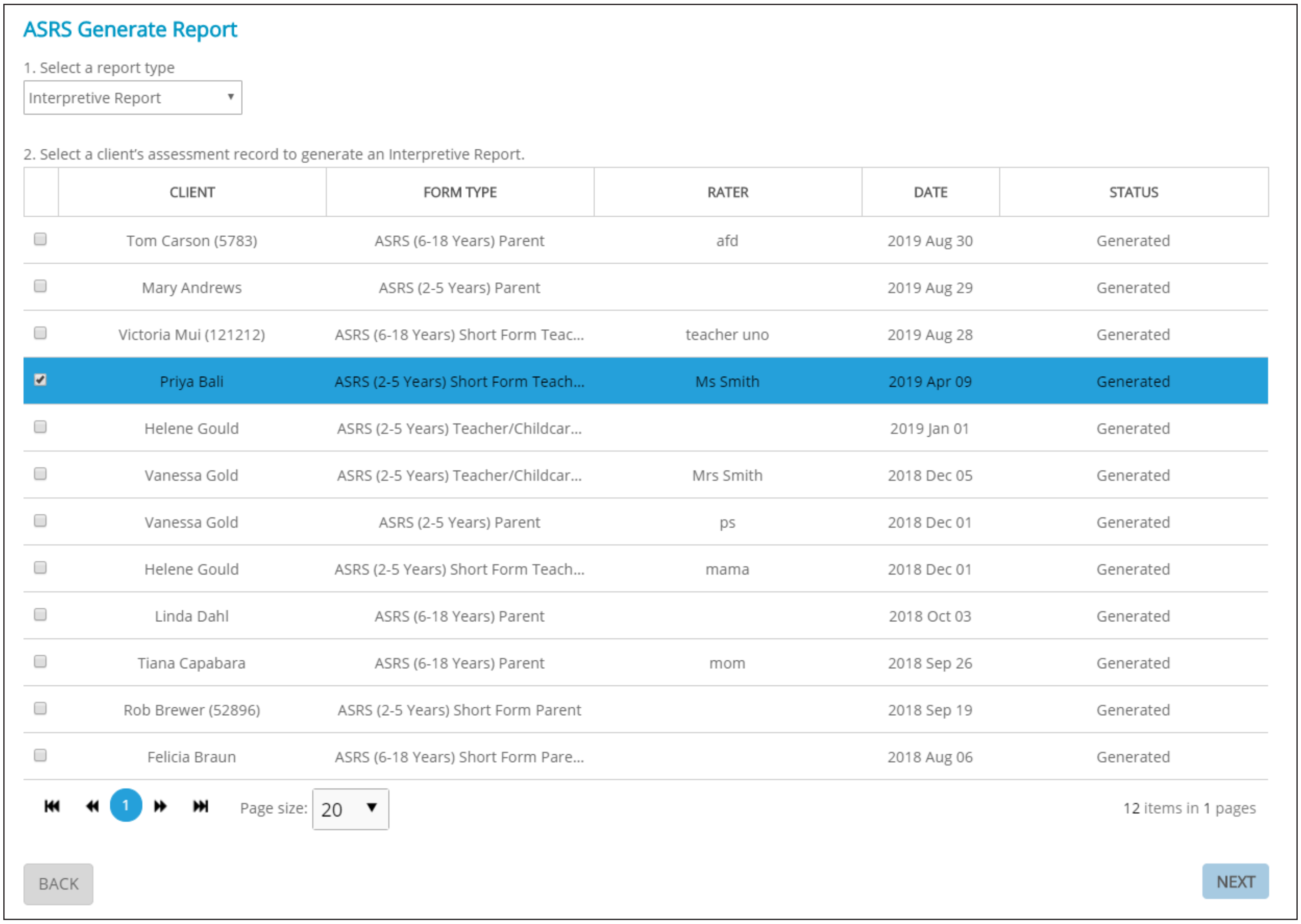
3. If you have not previously entered the client into the Assessment Center+, click **ASSIGN NEW CLIENT** then continue through the guided steps to create a client profile.

After an assessment has been completed, you can generate a report for the client through the Express Launcher.

1. Select the assessment and the type of report you wish to generate.



2. Select the client name for whom you wish to generate a report and click **Next**.


ASRS Generate Report

1. Select a report type

Interpretive Report

2. Select a client's assessment record to generate an Interpretive Report.

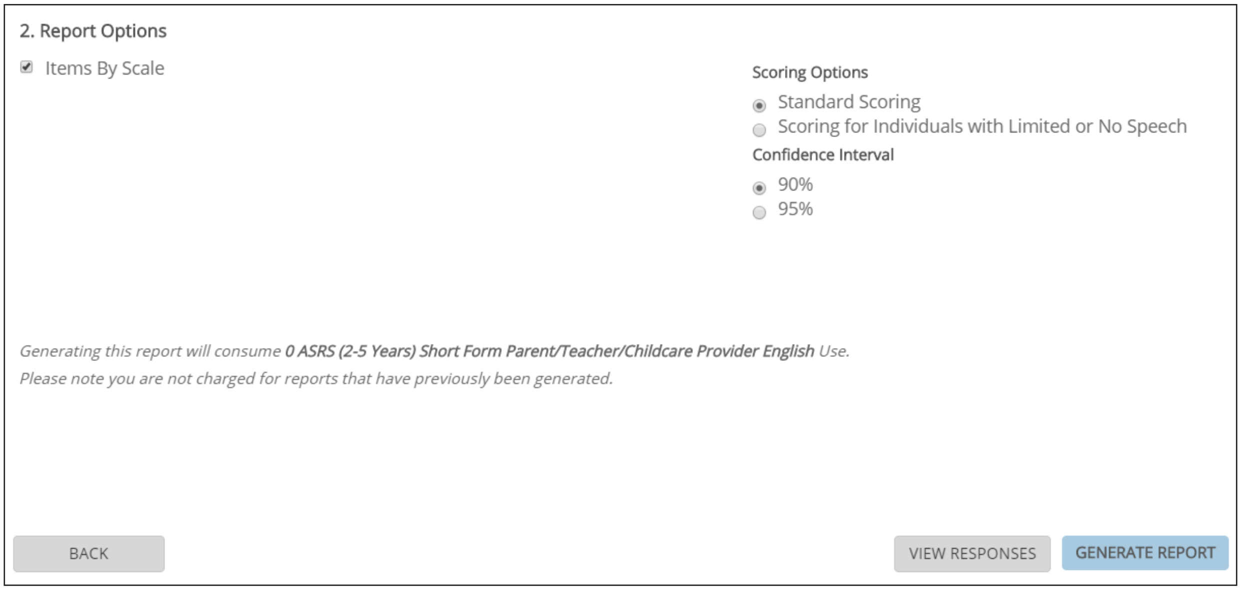
	CLIENT	FORM TYPE	RATER	DATE	STATUS
☐	Tom Carson (5783)	ASRS (6-18 Years) Parent	afd	2019 Aug 30	Generated
☐	Mary Andrews	ASRS (2-5 Years) Parent		2019 Aug 29	Generated
☐	Victoria Mui (121212)	ASRS (6-18 Years) Short Form Teac...	teacher uno	2019 Aug 28	Generated
☑	Priya Bali	ASRS (2-5 Years) Short Form Teach...	Ms Smith	2019 Apr 09	Generated
☐	Helene Gould	ASRS (2-5 Years) Teacher/Childcar...		2019 Jan 01	Generated
☐	Vanessa Gold	ASRS (2-5 Years) Teacher/Childcar...	Mrs Smith	2018 Dec 05	Generated
☐	Vanessa Gold	ASRS (2-5 Years) Parent	ps	2018 Dec 01	Generated
☐	Helene Gould	ASRS (2-5 Years) Short Form Teach...	mama	2018 Dec 01	Generated
☐	Linda Dahl	ASRS (6-18 Years) Parent		2018 Oct 03	Generated
☐	Tiana Capabara	ASRS (6-18 Years) Parent	mom	2018 Sep 26	Generated
☐	Rob Brewer (52896)	ASRS (2-5 Years) Short Form Parent		2018 Sep 19	Generated
☐	Felicia Braun	ASRS (6-18 Years) Short Form Pare...		2018 Aug 06	Generated

1 Page size: 20 — 12 items in 1 pages

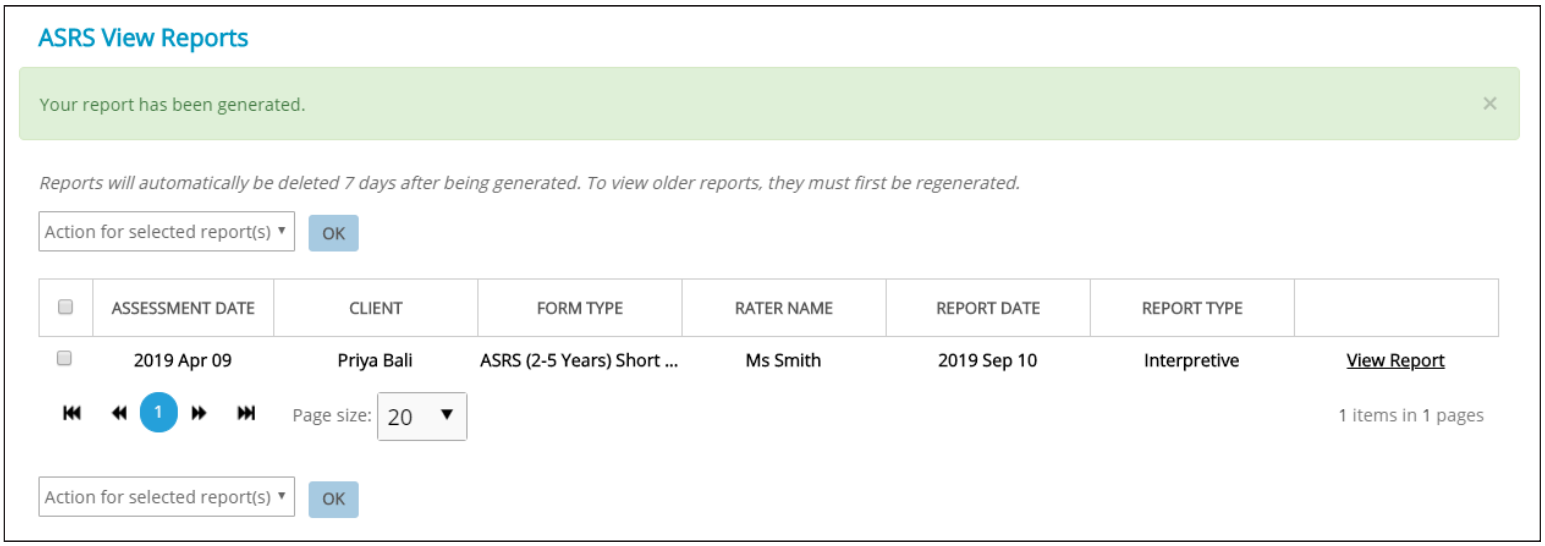
BACK NEXT

3. Ensure that the client's demographic information is correct. Changes can be made to the demographic information by clicking **Edit**.

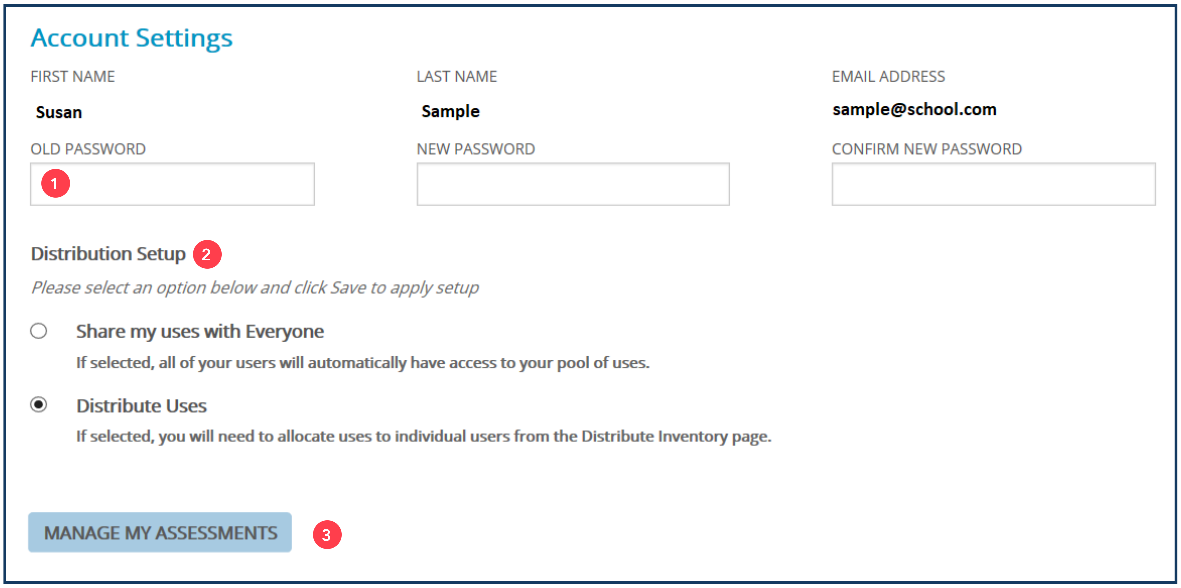
4. Scroll down to the report and norm options (if applicable). Make changes as needed.
   - If this is the first time an assessment report is being generated for this client and form type, you will consume 1 use.
   - If the report has been previously scored and generated, you will not be charged for regeneration.



5. Click **Generate Report**.
   - Once the report has been successfully generated, you will be navigated to the View Reports page.
6. Click **View Report** to open the PDF file. You will be able to access this PDF on the View Reports page for 7 days.
   - NOTE: After 7 days, you must regenerate the report (at no cost). Raw data from completed assessments can always be accessed on the Generate Reports page.



View or modify information related to your account by clicking **Account Settings** in the left menu.



1 **Change your password** — Enter your old password, then enter and re-enter your new password.

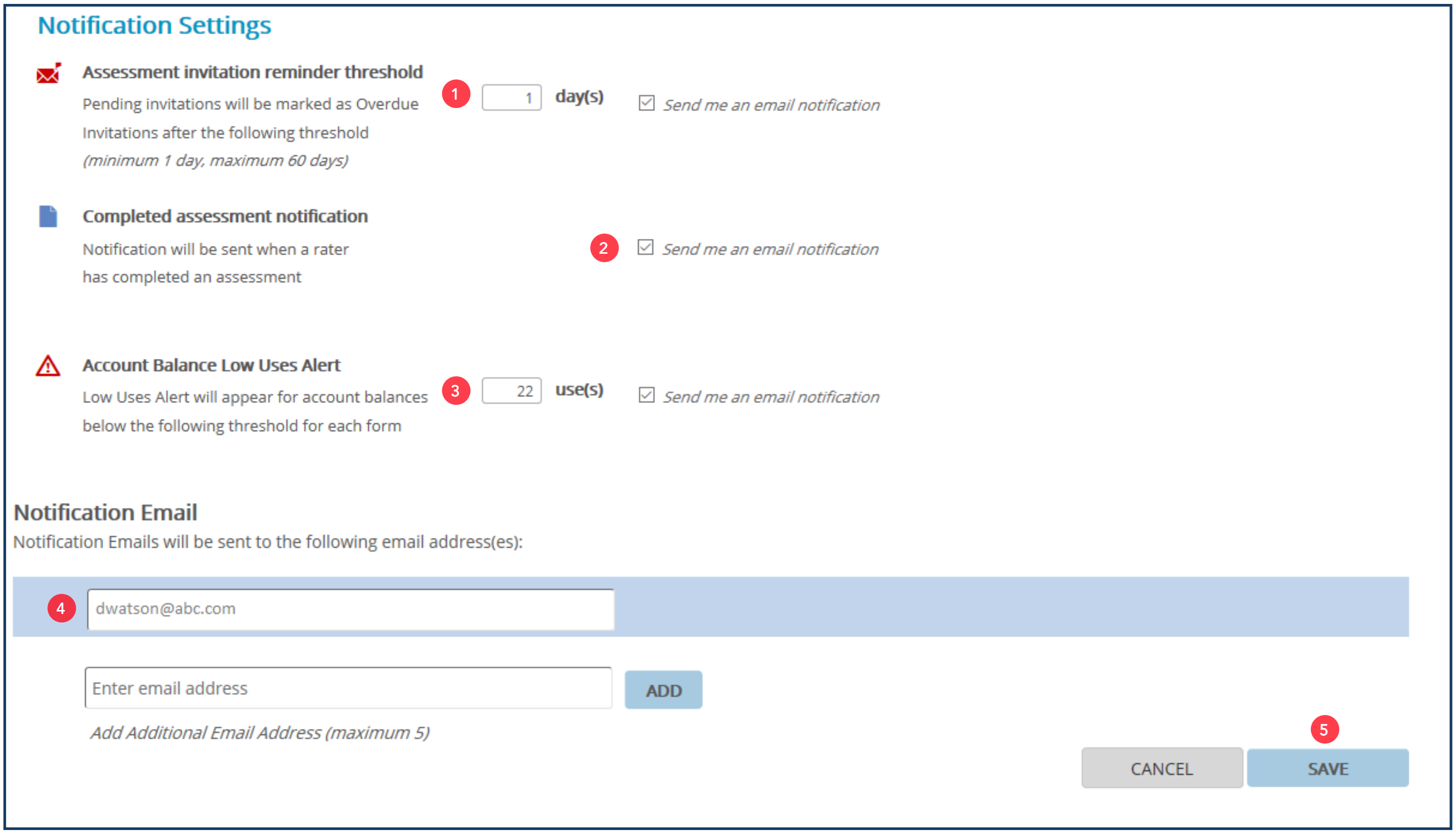
2 **Distribution Setup** – There are two choices for how you allocate form uses to sub-users:

- By default, your new account is set to **Distribute Uses**. This means that as the administrator, you can pick and choose how many forms each of your sub-users have access to. To manually distribute inventory, please see the instructions below.
- **Share my uses with Everyone** allows you to maintain your inventory in a pool. This means that when a sub-user has permission to use a specific assessment, they will be sharing the forms with everyone in the organization.

3 **Manage My Assessments** — Click here to view and manage the assessment licenses your account has enabled.

NOTIFICATION SETTINGS

Scroll to the bottom of the Account Settings page to view your Notification Settings.



1 **Assessment invitation reminder threshold** — Set and adjust the overdue threshold for pending invitations. Check the box to receive an email notification when a pending invitation is overdue.

2 **Completed assessment notification** — Check the box to receive an email notification when a rater has completed an assessment.

3 **Account balance low uses alert** — Set and adjust the threshold for receiving a Low Uses alert. This will display warning signs on your Account Balance page when any of your forms falls below your set threshold amount. Check the box to receive an email notification when any of your forms falls below your set threshold amount.

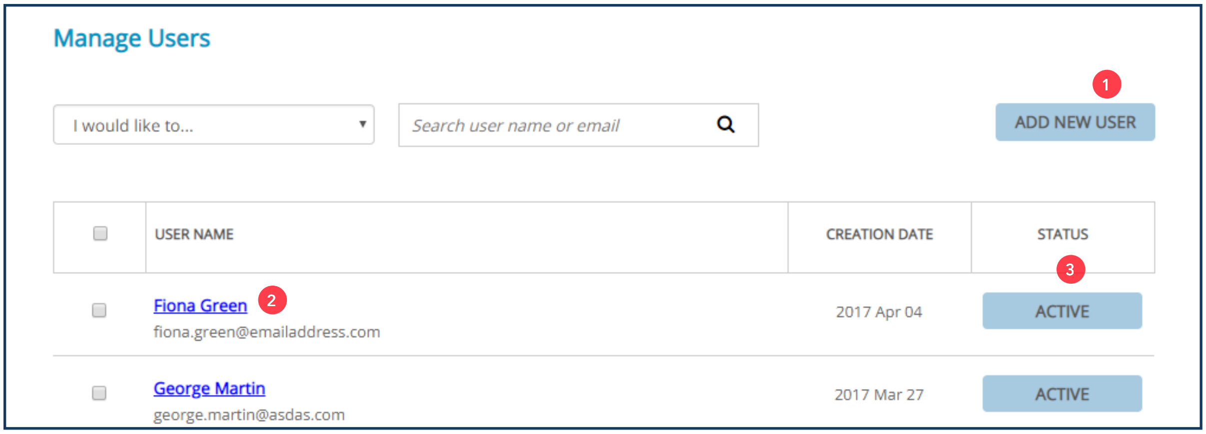
4 **Notification email address** — Enter the email address that will be associated with this account. This is the address where all notification emails will be sent. Up to 5 email addresses can be added to this account.

5 **Save** — Click **SAVE** when you're finished making changes to your account.

ADDING SUB-USERS

As an admin-user, you have the ability to create sub-users under your account. Sub-user accounts have the ability to conduct assessments and generate reports but have no control over inventory or account permissions.

To add or modify your sub-users, click **Manage Users** in the left menu. The Manage Users page appears:

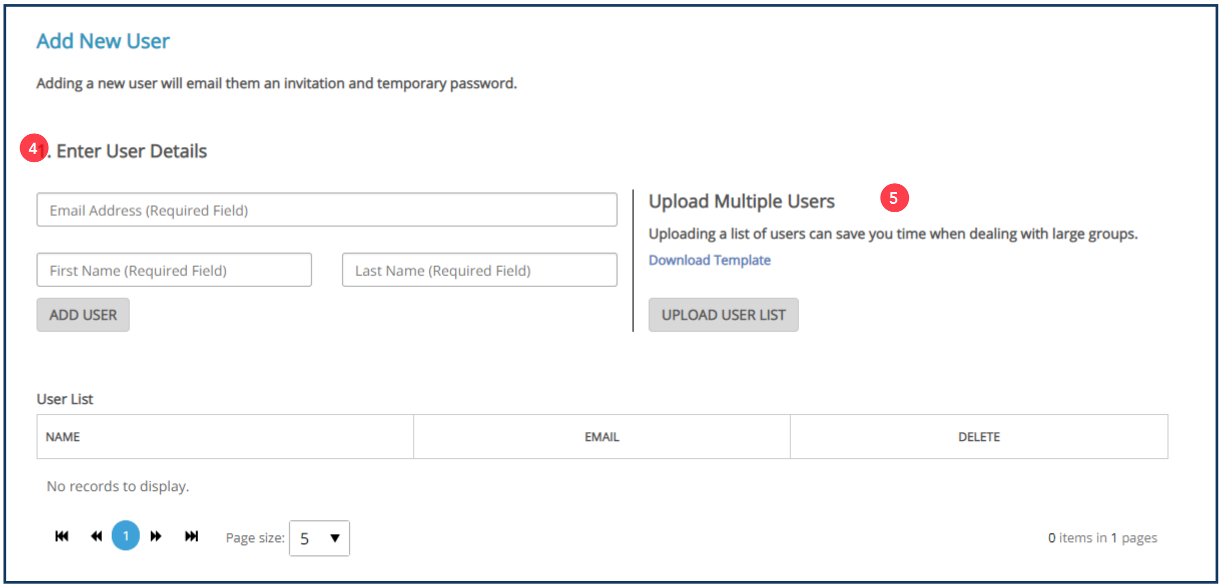


1 **Add New User** — Click to add one or more users on the Add New User page (See screenshot below).

2 **Edit User Details** — Click the sub-user's name to manage their account details and permissions.

3 **Active/Inactive** — This column displays the status of a user: Active or Inactive. Sub-users who are Inactive will not be able to log into their account. NOTE: Activating/Deactivating sub-users will not affect their assessments or client records.

When you click **ADD NEW USER**, the Add New User page appears:



To add a new user, you must provide an email address, first name, and a last name. You can add users one at a time, or by uploading a list.

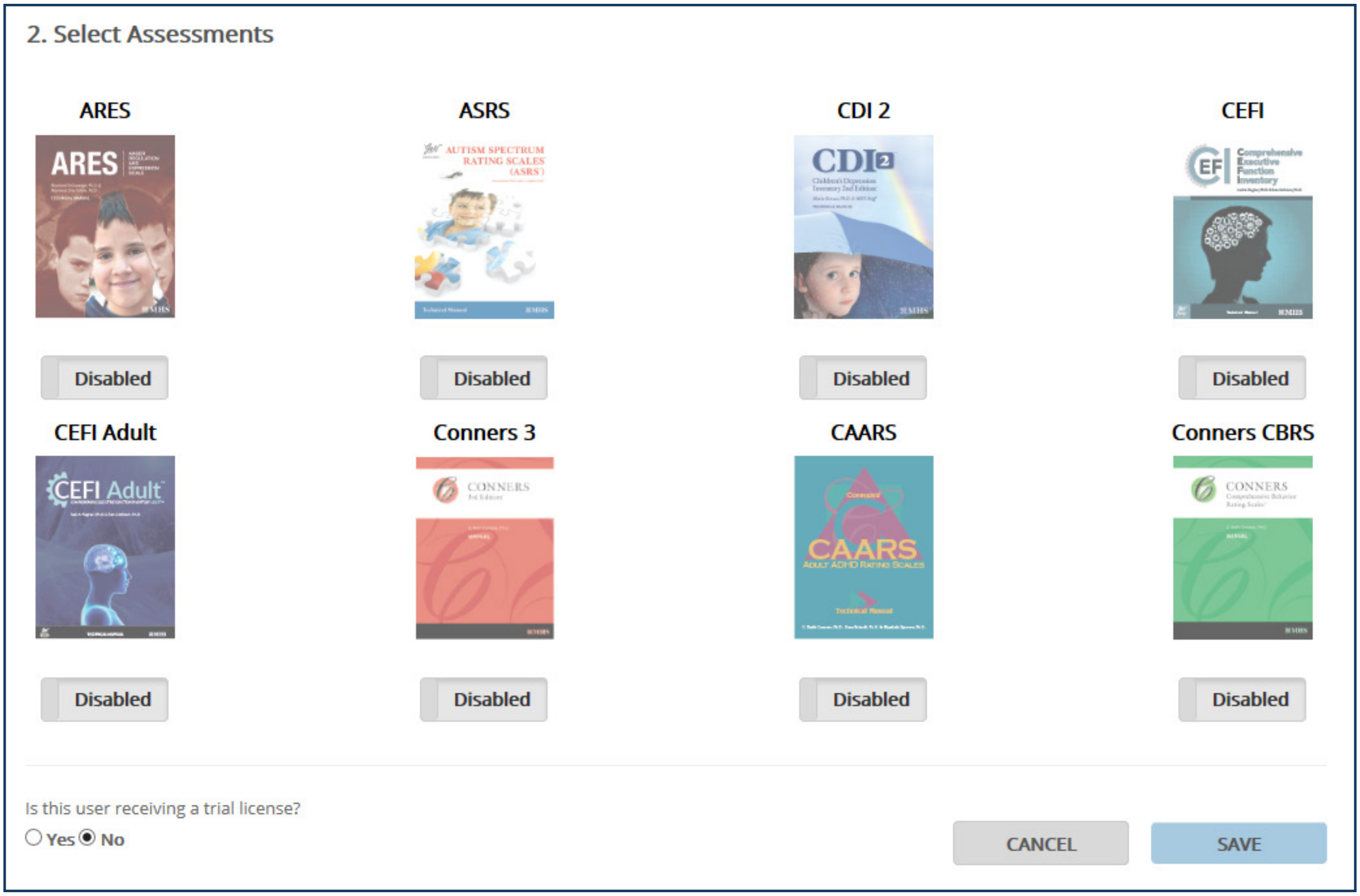
4 **User details** — Add one user at a time by completing the fields on the left-hand side and clicking **Add User**.

5 **Upload multiple users** — Add multiple users by downloading the template, adding your users' information, and uploading the document.

ASSIGNING ASSESSMENTS TO SUB-USERS

To give your sub-users access to assessment products:

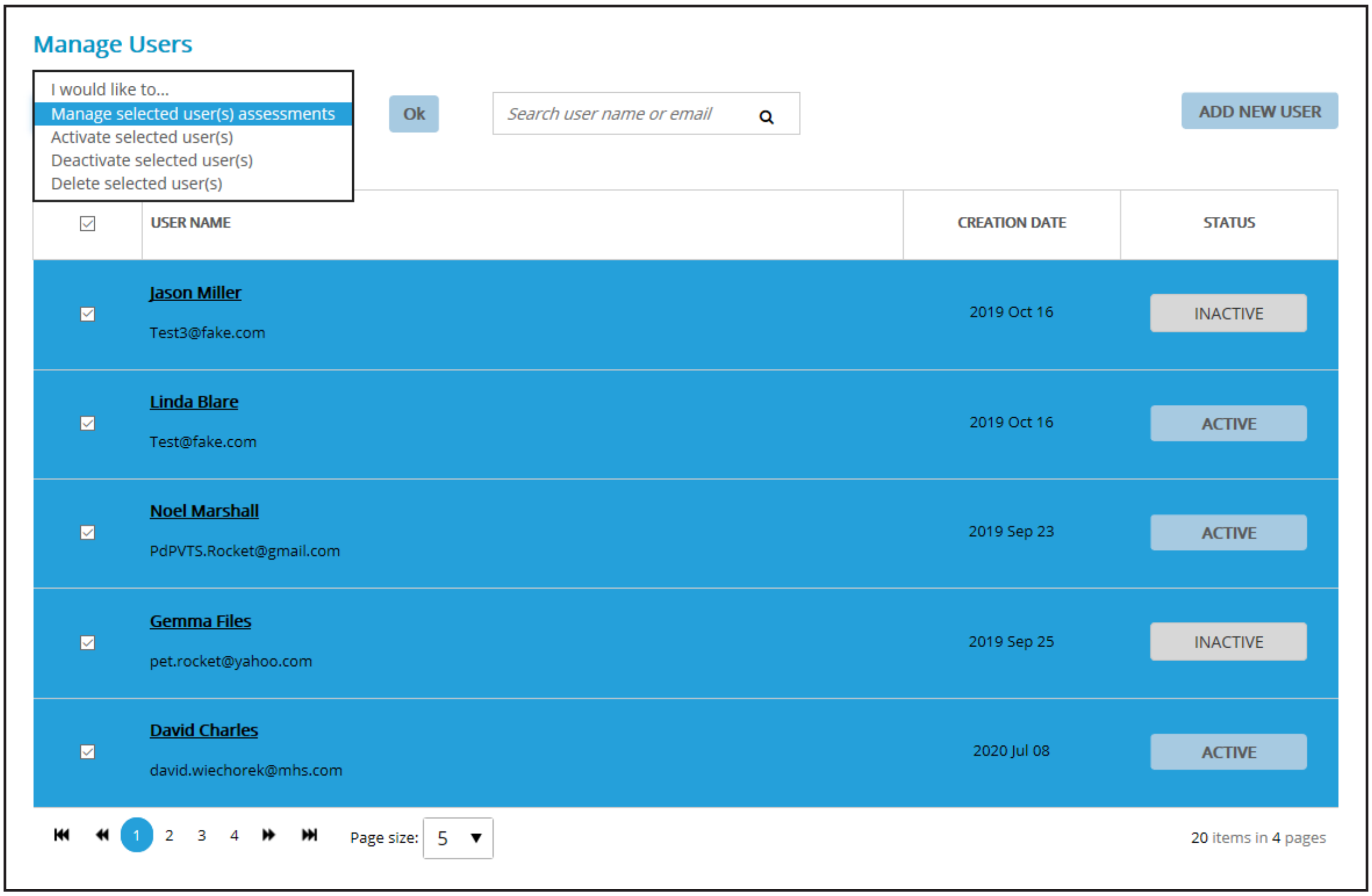
1. Scroll to the bottom half of the Add New User page so you can see the Select Assessments section.
2. To give the sub-users access to a product, toggle the button under each assessment icon so it reads Enabled. When an assessment is Enabled, the sub-user will be able to send assessment invitations to raters and clients, send reminders, and generate reports.
3. When you are finished entering your sub-user details and assigning assessments, click **SAVE**.



GIVING ACCESS TO MULTIPLE SUB-USERS

To save time, you can assign product access to multiple users at the same time.

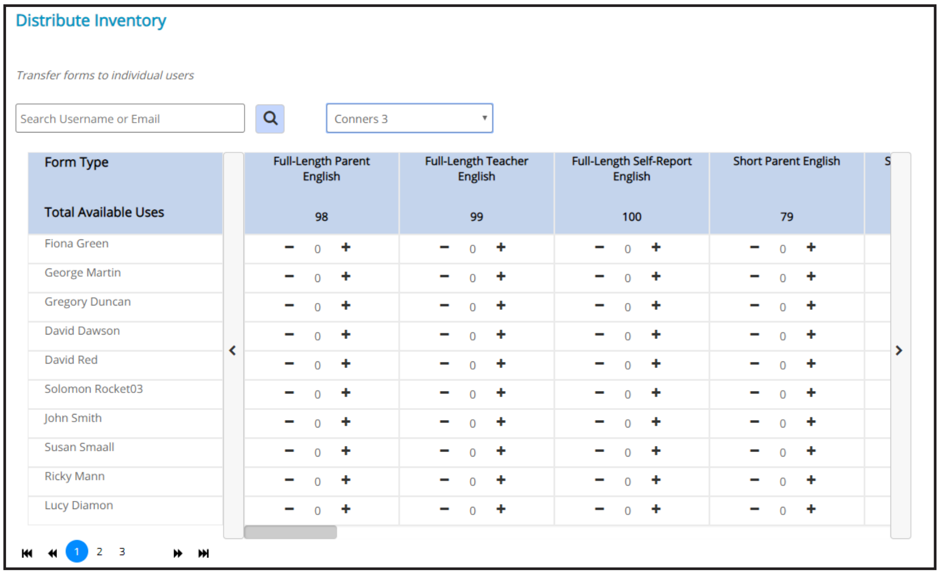
1. On the Manage Users page, select the users you want to give product access to. To select all users, click the checkbox at the very top of the table.
2. From the “I would like to...” dropdown, select **Manage selected user(s) assessments**.
3. Click **OK**. The Select Assessments page appears.
4. Select “Enabled” for the products you want to give the sub-users access to.
5. When you are done, click **SAVE**.



DISTRIBUTING FORM USES

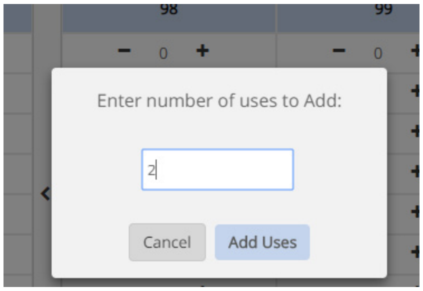
If you selected "Distribute Uses" as your distribution setup on the Account Settings page, you can manually distribute form uses to your sub-users by following the steps below.

1. Click **Manage Inventory** > **Distribute uses** in the left menu. The Distribute Inventory page appears.

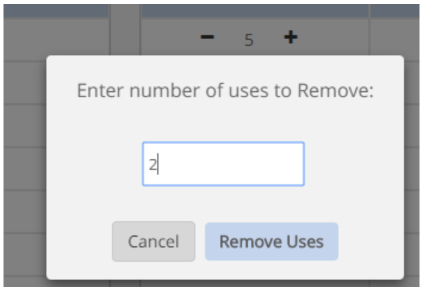


2. Select the assessment you wish to allocate uses for in the dropdown menu. The table underneath will repopulate to display the sub-users who have access to the selected assessment.

3. Use the + and — symbols to add or remove uses for a specific account and form. A modal pop-up will appear.



Add uses modal pop-up



Remove uses modal pop-up

4. Enter the number of uses you want to add or remove from this particular sub-user.

5. Click **Add Uses** or **Remove Uses**, depending on which action you are taking.

The admin client management feature lets you transfer clients between yourself and a sub-user, or from one sub-user to another. This could be useful when you or a sub-user is out sick, on maternity leave, or otherwise not available.

To transfer clients between users:

1. Click **My Clients** on the left menu.

   The My Clients page appears. By default, it displays a table of all of your own clients.

   (Note: If you want to transfer your own clients to a sub-user, you can skip ahead to step 4.)

2. Click the "View Clients by Clinician" dropdown menu at the top-left of the page. The menu opens to display the names of your active sub-users.

3. Select the sub-user you want to transfer clients ***from***.

   The table changes to show that sub-user's clients.

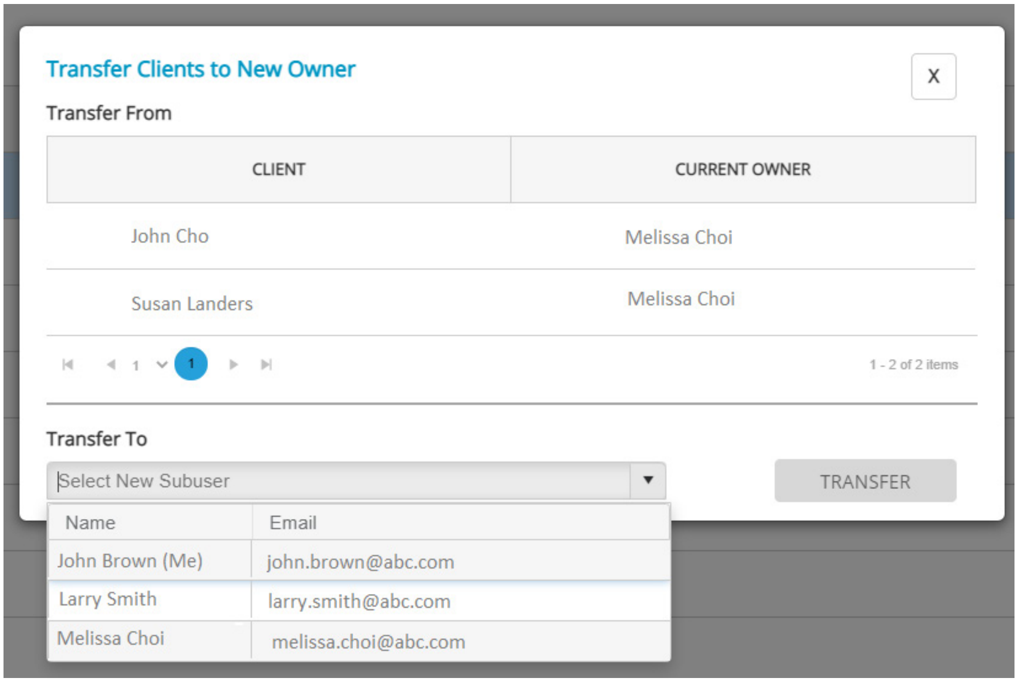
4. Select the clients you want to transfer by clicking their respective checkbox.

5. Select **Manage Clients' Owner** from the "Action" dropdown menu at the top-right of the page.

   The Transfer Clients pop-up appears. It displays a list of the clients you selected for transfer, along with the name of their current owner.

6. Click the **Transfer To** dropdown menu.

   This menu opens to display your name and the names of your active sub-users.



7. Select the clinician to transfer the clients to.
8. Click **TRANSFER**.

   A pop-up appears asking for confirmation of the transfer.
9. Click **CONFIRM**.

The clients are successfully transferred to the selected clinician.

A note on client transfer

The moment the clients are transferred, it will trigger the portal to send a receipt to the former owner of the clients, the new owner of the clients, and the administrator. This receipt will confirm what was done, the clinicians involved, and the clients that were transferred.

For the clinician that the clients were transferred to, the clients will appear on their My Clients page, and all the completed assessments and reports will become available on their Completed Assessments page.

ACCOUNT BALANCE

You can view your account balance for each assessment, broken down by form type (if applicable). To do this:

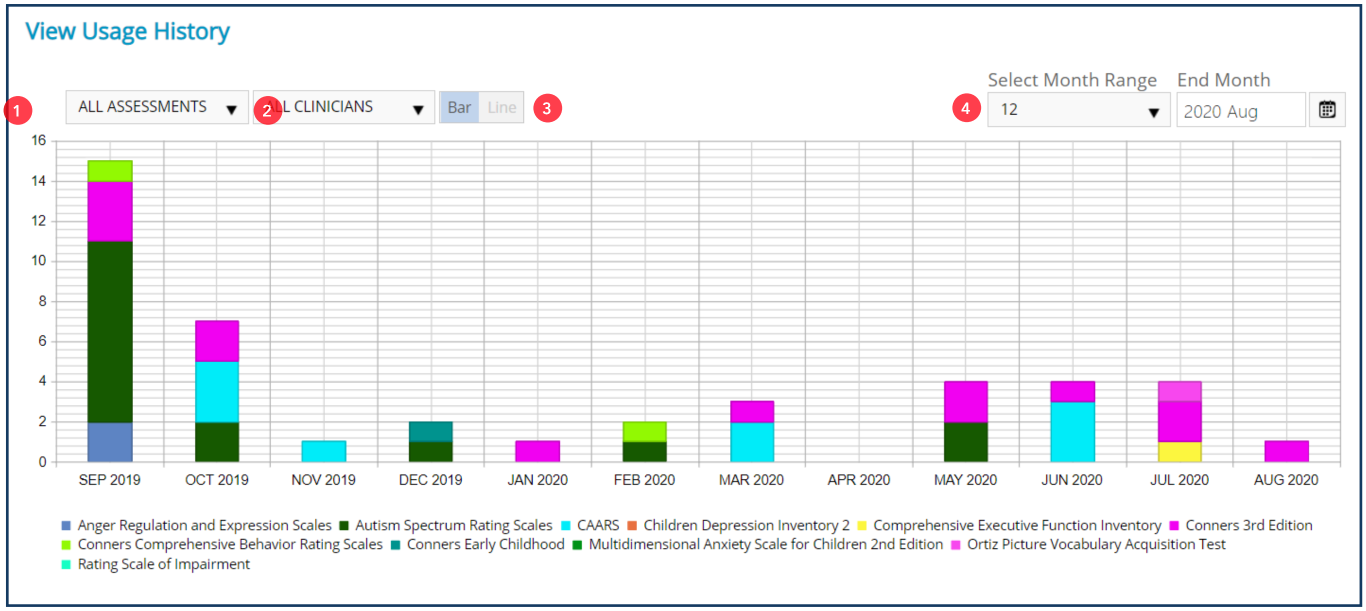
1. Select **Manage Inventory** > **Account Balance** from the left menu.
2. Select the desired assessment from the list.
   You will see the number of uses remaining for that product.
3. To purchase additional form uses, click **Buy**.

Conners 3rd Edition (Conners 3)

DESCRIPTION	RATER	LANGUAGE	REMAINING	
Conners 3	Parent	English	170	Buy
Conners 3	Teacher	English	193	Buy
Conners 3	Self-Report	English	190	Buy
Conners 3 Short	Parent	English	168	Buy
Conners 3 Short	Teacher	English	194	Buy

VIEWING USAGE HISTORY

You can view the usage history for all the assessments you and your sub-users have access to. To see this history, select **Manage Inventory > View Usage History** from the side menu. The View Usage History page appears, with a table that displays how many uses were consumed per month within the current year.



1 **Assessment dropdown menu** — Select **ALL ASSESSMENTS** to view usage history of all products, or select a specific assessment from the menu to only see the usage history for that product.

2 **Clinician dropdown menu** — Select **ALL CLINICIANS** to view the usage history of all your sub-users, or select a specific sub-user from the menu to only see their usage history. NOTE: To view your <u>own</u> usage history, select **My Usage** from the menu.

3 **View options** — Select an option to view your usage history in either a bar graph or a line graph.

4 **Time range** — Select the time range of the data you wish to view. For example, choose 12 under the "Select Month Range" dropdown to view 12 months worth of information. By default, "End Month" displays the current Month and Year.

FREQUENTLY ASKED QUESTIONS

STARTING AN ASSESSMENT

What are the options for emailing a form?

- Using the Online Assessment Center+: send assessment links with a template or custom email from noreply@mhs.com
- Using your own email service: copy and paste assessment links and send an email through your own email service

What do these words symbolize (<Assessmenttime>, <Product>, etc) on the email invitation page?

- Those words are the dynamic text fields that can be used to draft an email
- The word will be replaced based on the product, form, and even rater type selected
- For example, "<Assessmenttime>" will change to reflect a form's average completion time; <Product> will say ASRS if the assessment invitation is for the ASRS
- To view the text in the dynamic fields as they will appear to the user, click **Preview**.

GENERATE REPORTS

How can I check a rater's response before scoring?

- Select the client's assessment record

Will my reports or data be deleted from the site after a number of days?

- Although reports will be automatically deleted from the View Reports page after 7 days, the raw assessment data will be kept indefinitely (unless you choose to delete the record)
- Simply re-generate reports for any older assessments as required

MANAGE CLIENTS

What are tags and how can I use them?

- Tags can be used to help identify or sort clients
- For example, you can tag clients by school, teacher, clinician, etc.
- Add tags when editing/creating client profiles within My Clients

INVENTORY

When is a Use consumed?

- A Use is consumed the first time you score results and generate a report
- Re-generating a report does not consume a Use

ACCOUNT SETTINGS

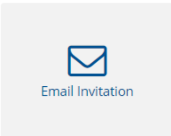
Where can I manage my account notifications?

- Click **Account Settings** on the main menu
- Under Notification Settings, you can change the following: Email notifications; Uses that trigger low balance alert; and when pending invitations become marked overdue

ASSESSMENT METHOD GUIDE

There are a variety of different methods in which an assessment can be administered. The available methods vary depending on the product. Below are the steps that correspond to each assessment method.

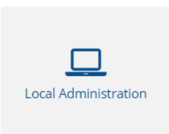
SEND A GENERATED LINK THROUGH EMAIL INVITATION



Use the system to create assessment links for remote administration.

1. Select or Add a client.
2. Confirm selected client information.
3. Select forms.
4. Generate Links. If you would like to send the links using the portal, proceed to step 5
   OR
   copy and paste the links to use your own email service to send the links to the raters or client directly.
   Click **Done** when finished.
5. Click **Continue to Generate an Email** to send the links using the portal.
6. Add the rater/client email addresses.
7. Edit/Write the email message.
8. Review the outgoing invitations.
9. Send the email.

CONDUCT A LOCAL ADMINISTRATION

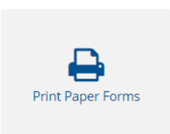


Use Local Administration to administer an assessment in person using your browser.

1. Select a form.
2. Select or Add a client.
3. Confirm selected client information.
4. Click **Start Now** to begin.

Note: Upon clicking **Start Now**, you will be automatically taken to the web version of the assessment. The system will also log you out of the assessment center.

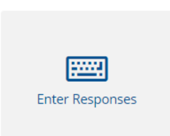
PRINT PAPER FORM & ENTER RESPONSES



Access PDF versions of the assessments to print and distribute to the client. Use the portal to score the responses automatically.

1. Open the PDF form by clicking **Print Form**.
2. Print and distribute to your clients.

Upon completion of the paper form, use the **Enter Responses** button to enter the assessment information into the portal.



3. Select form.
4. Select or Add a client.
5. Confirm selected client information.
6. Enter demographic information as entered on the completed paper form.
7. Enter responses.
8. If **Verify** is turned on, you must enter the responses a second time to validate the information.

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