MANAGING SUB-USERS

TASK	Online Assessment Center	Online Assessment Center+
Creating a sub-user	Users > Add New User > create new user > enter details > save. Your user will be able to sign in with the creden-tials you create for them and then update their password.	Manage Users Page > Add New User > fill in name and email OR upload list of your sub-users > click Save > you have the opportunity to assign assessment access by clicking the enable button > click Save again with the button on the bottom right > the sub-user will receive account information in their email and will be able to set up their password
Giving sub-user uses	Sub-users may need to contact admin-istrators or distributors to purchase uses for them. An administrator's uses are shared across sub-users.	Distribute Inventory > select product > search for user or find the user on the list > choose number of forms to give user by pressing the + sign under the form you want > enter the number of uses > click Done Under the Account Settings Page, users can also initiate to "Share My Uses With Everyone" which allows users to access any uses you purchase. If you select Distribute Uses again you will need to redistribute them
Giving sub-user product access	Shared automatically	Manage Users > Add New User > En-able product of choice before you save the user **OR** Manage Users > select user > Enable product > Save
Removing a sub-user	Users > click Delete beside user of choice	Manage users > select user > click red Delete User button

MANAGING INVENTORY AND PURCHASING FORMS (USES)

TASK	Online Assessment Center	Online Assessment Center+
Consuming a form	Purchase form using Shopify link on the MHS Online Assessment Center, then use it	Forms can be sent out and completed at any time, but uses must be purchased via shopify link or MHS.com to generate the report. One unique report is one use.
Buying forms (uses)	Home > Purchase Form > select assessment > select form type > choose quantity > purchase OR Home page > choose admin method (paper administration or online) > choose assessment > select form type > purchase form	Account Balance > you will see a "Buy" button beside the "Select item" dropdown and also beside each type of form if you expand the information for an assessment.
View Pending Forms	Home > click administration method of choice > select assessment > select form type > you are in the available forms by default, click the Pending tab to see Pending forms of that form type	Pending Invitations Page
NEW **Sending Reminders**	You must keep track of your raters and send them emails to remind them to take the assessment	Pending Invitations Page > click the reminder icon under the "Action" column to send a reminder. Or, click the "Send Reminders To All Pending" button in the top righthand corner to send them to everyone. You can also send reminders automatically. Check off "Automatically send reminders". In Account Settings, set the threshold by which an assessment is overdue. The user can always customize the reminder email that is sent out, and save the customized email to use again.

MANAGING CLIENTS OR FOLDERS

TASK	Online Assessment Center	Online Assessment Center+
Folder Creation	Subuser: Create a folder after logging in. Admin: Create a folder after logging in and selecting a subuser. Open folders to complete assessments or view previous assessments.	Folders have no longer been included on the new site. Instead, you can make clients. Assessments completed by raters are automatically added to client profiles. Clients can be tagged – the tags are searchable on the My Client page
NEW **Create Clients**		My Clients Page > click the Add New Client button

ADMINSTERING ASSESSMENTS

TASK	Online Assessment Center	Online Assessment Center+
Administer assessment online and send to a recipient	Home > Administer Online - Select Assessment > select assessment > select form type > Generate Link for a form > copy the link. You can also regenerate links from pending forms in the Pending tabs	Home Page > Express Launcher > Beside your assessment of choice, click Email Invitation > follow the procedure to choose or add your client, your assessment form, and the raters. At the end of the process, you will receive the assessment link and the option to add and send emails for raters
Conduct a local administration	Home > Administer Online - Select Assessment > select assessment > select form type > Generate Link for a form > start test (can do so for an available or pending form)	Local Administration from assessment's product page OR Express Launcher
Administer paper forms	Home > Administer Paper Forms – Get Paper Forms > Select assessment > select form type > Create Form > Open (then print or save PDF) **OR** View Forms, open Form ID is on the bottom of the form	Print as many paper forms as you would like by selecting Print Paper Forms for an assessment from the Express Launcher or its product page. **PAPER FORMS NO LONGER HAVE ID AND A USE IS NOT CONSUMED BY GENERATING A PAPER FORM**
Enter responses	Home page > Enter Responses > Enter Form ID	Enter Responses from the Home Page **OR** from the assessment's Product Page **OR** from the Express Launcher
NEW **Product Page**		Select product from Express Launcher OR from My Assessments Page

GENERATING AND VIEWING REPORTS

TASK	Online Assessment Center	Online Assessment Center+
Generating Reports	Access Generate Report tab from homepage, choose assessment and click Generate or enter form ID and then generate	Log in to the Home Page, click the Generate Reports button, select the product, then click the report type you wish to generate. **OR** Go to the My Assessment Page, choose the assessment and then click Generate Reports Shortcut: The Completed Assessments Page shows all of the assessments that have been completed. To generate a report, click **Generate Report**. **For records from the MHS Online Assesment Center**: After you begin to generate the report, you will need to assign a client to that record. You will be prompted to select an existing client, or add a new client by clicking the Add New Client button in the top right hand corner. Complete the demographic information, then click next to continue creating the report.
Viewing Report	Home page > View Reports	When you click My Assessments, it displays a list of all the products you have access to. Click the product title for the report you wish to generate. From the submenu that appears, select View Reports.
Regenerating a report	Repeat generation process after five days	Repeat generation process after 7 days.

VIEWING DATA

TASK	Online Assessment Center	Online Assessment Center+
NEW **Viewing Usage**		Manage Inventory Page > View Usage History You are able to filter by clinician and product
NEW **Progress and Comparative Reports**		IF product has progress or comparative reports available Home > Generate Reports button – select progress or comparative reports for product of choice **OR** you can do it from Generate Reports button on the assessment's Product Page
NEW **Scored Datasets**		IF product has scored datasets available – Home > Generate Reports button – select scored dataset for product of choice **OR** You can do it from Generate Reports Page on the assessment's Product Page