

TA Portal Getting Started Guide

Multi-User Accounts

The screenshot displays the MHS TA Portal interface. At the top left is the MHS logo with the tagline "Beyond Assessments". Navigation links for "HOME" and "MY PRODUCTS" are in the top right. A "My Products" section features a grid of assessment tools including EQ-i 2.0, EQ 360, EQ-i 2.0 Higher Education, MSCEIT, PEARMAN Personality Integrator, HRG Hardiness Resilience Gauge, risktype compass, Change Style Indicator, Influence Style Indicator, Decision Style Profile, Paper Planes, Inc, The Exchange, Paper Scrapers, Press Time, The Acquisition, EdgeWork, Change Navigator, Discovery Leadership Profile, Emerging Leader Profile, entrepreneurial EDGE, SALES AP, and CS AP.

On the right, a "Tokens Available" box shows 394 tokens as of Wednesday 8/5/2020, with a "Manage Tokens" button. Below this are links for "Account Settings" and "Report Calculator".

A "Manage" sidebar on the left includes "My Account" and a "Date" filter with a list of "Aug 06, 2020" entries.

A table below the products shows transaction history:

Date	Account	Transaction	Amount	Balance	Icon
Aug 06, 2020	(TTCBD96)	Transfer	500	823	🗑️
Aug 06, 2020	(TTCBD96)	Transfer	500	823	🗑️
Aug 06, 2020	(TTCBD96)	Transfer	500	823	🗑️

Page size: 20, 9 items in 1 pages.

A "PURCHASE TOKENS" form at the bottom right has a "Tokens:" input field with the value "0" and a "Submit" button.

Introduction



The MHS Talent Assessment portal allows you—the multi-user—an easy way to manage sub-users, distribute tokens, and track usage.

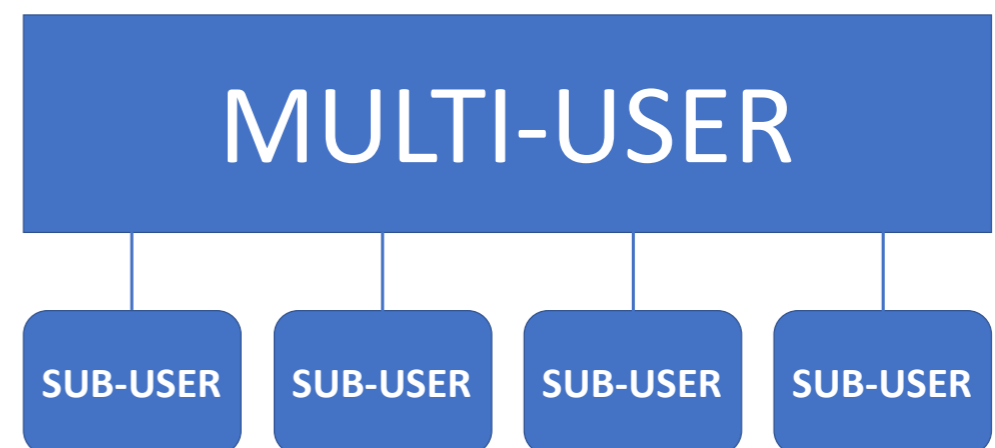
This getting started guide will show you how to conduct the most commonly performed tasks.

WHAT IS A MULTI-USER?

A **multi-user** is a designation given by MHS to individuals who are account administrators. By this we mean that the multi-user is in charge of other accounts, referred to as **sub-user accounts**.

The multi-user is responsible for setting up and managing sub-user accounts. These sub-users can conduct assessments. However, sub-users cannot purchase tokens from MHS. Instead, they receive tokens from the multi-user, as described on page 12 of this guide.

Please note that in order to be designated as a multi-user, you must apply to MHS. You can not switch your account designation on your own.



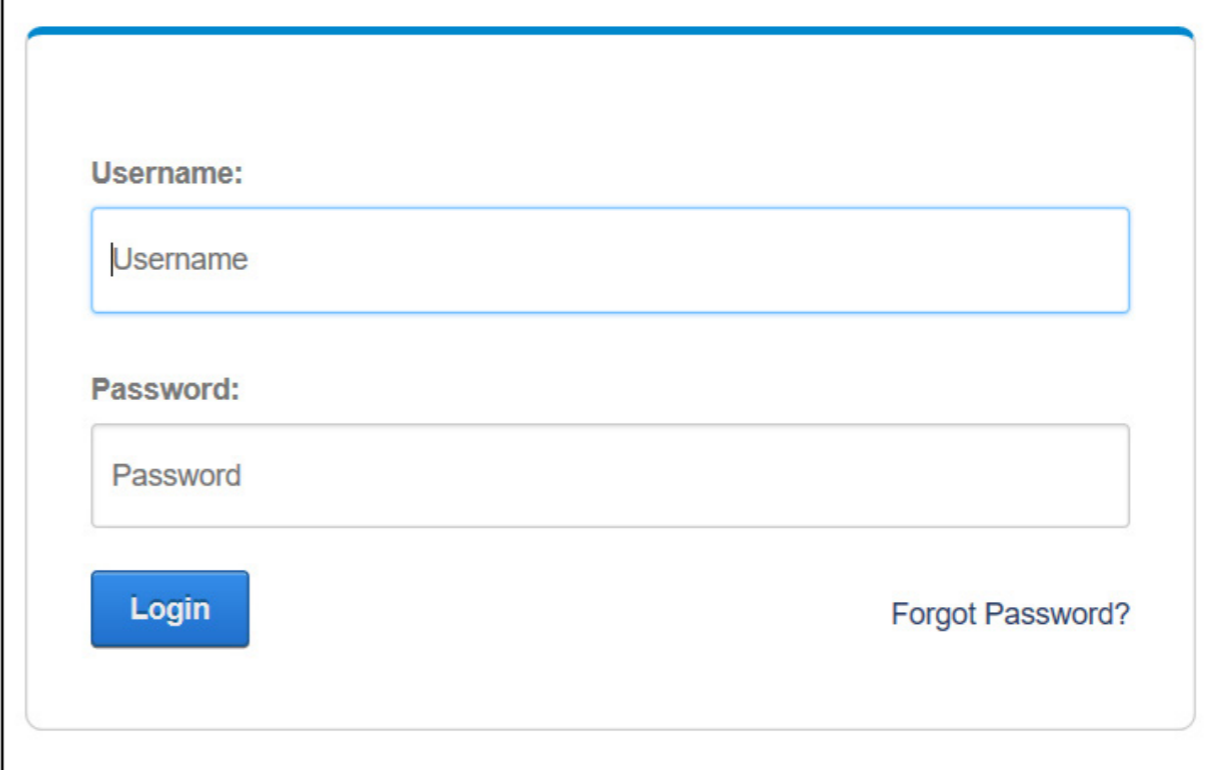
Logging In

STEP 1

To log in to the Talent Assessment portal, go to tap.mhs.com

STEP 2

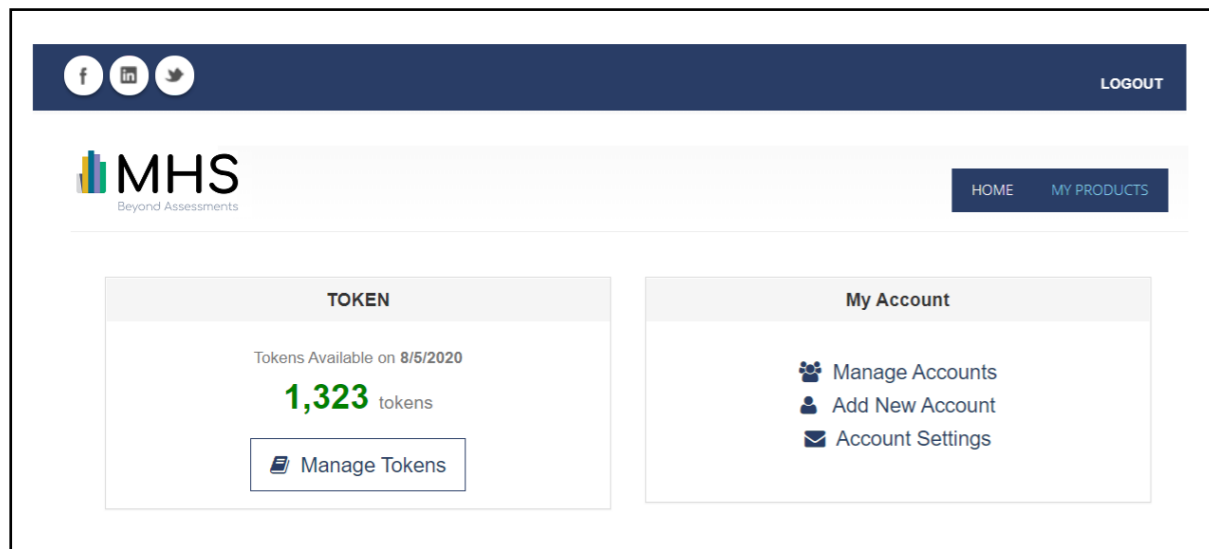
1. Enter your user name
2. Enter your password
3. Click **Login**



The screenshot shows a login form with the following elements:

- Username:** A text input field with a light blue border and a vertical cursor on the left. The placeholder text "Username" is visible.
- Password:** A text input field with a light gray border and the placeholder text "Password".
- Login:** A blue rectangular button with the text "Login" in white.
- Forgot Password?:** A text link located to the right of the Login button.

Your Home Page



When you log in, you're taken to the multi-user home page.

The home page is divided into two sections:

- **Tokens** lets you purchase and transfer tokens
- **My Account** lets you add and manage your sub-users

NOTE

To return to the home page at any time, click **HOME** in the top menu.

HOME MY PRODUCTS

HOW DO I CONDUCT AN ASSESSMENT?

When your sub-users log-in, they see product icons that let them conduct assessments.

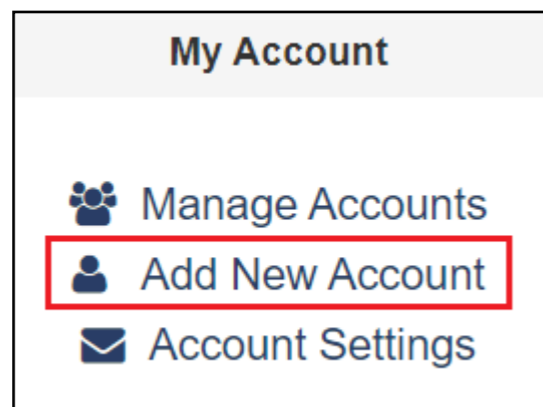
As a multi-user, you do not see these icons when you log-in because your account is set up for administration only.

If you want to conduct assessments, set up a new sub-user account for yourself as described on page 6.

Creating a New Sub-User Account

STEP 1

To create a new account for one of your sub-users, click **Add New Account** on the home page.



STEP 2

On the next screen, enter an account name and email address for the new sub-user.

An email with a password for the new account will be automatically generated and emailed to the sub-user.

Account Details

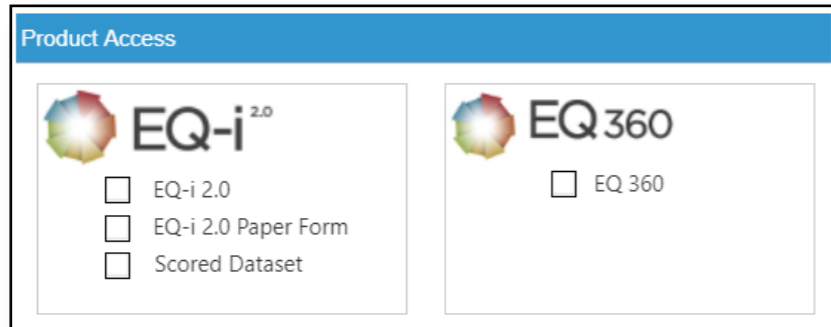
Account Name:

Email Address:

A new password for this account will be automatically generated and emailed to the user

Note: Sub-users can only be added if they have been certified on the tool and are active in the MHS system. If you have trouble adding their email, go back to your sub-user and verify the email address that is associated with their account.

STEP 3



The screenshot shows a 'Product Access' interface with two columns. The left column is for 'EQ-i 2.0' and contains three checkboxes: 'EQ-i 2.0', 'EQ-i 2.0 Paper Form', and 'Scored Dataset'. The right column is for 'EQ 360' and contains one checkbox: 'EQ 360'. All checkboxes are currently unchecked.

Select the check boxes beside the products and tools you want to make available for the sub-user. When the sub-user logs in to their account, they will see the products available on their home page.

Note: You can only enable access to products and tools that you have the rights for.

STEP 4

Click **Save Changes**.

An account has now been created for your sub-user. They will receive an email with all of their log-in details. Once they log in to the portal, they will be able to use the assessments that you provided access for.

CREATING A SUB-USER ACCOUNT FOR YOURSELF

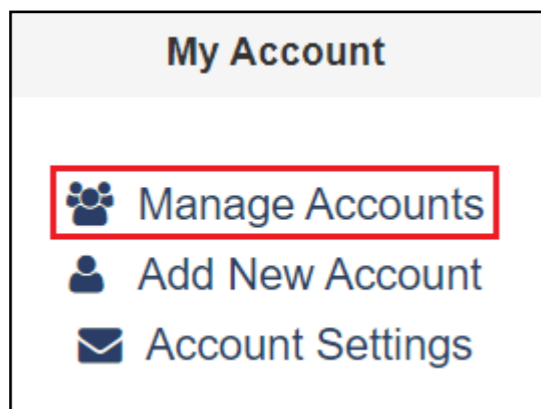
When a multi-user account is set up by MHS, it does not include the ability to invite participants and conduct assessments.

If you want to conduct assessments, you must create a sub-user account for yourself. To do this, please follow steps 1-4 as outlined above.

Editing Sub-User Accounts

STEP 1

To make changes to the sub-user accounts that you have created, click **Manage Accounts** on the home page.



STEP 2

A table of all your sub-users appears. To assign a new password, modify access to products, or make changes to the sub-user's name and email address, click **Edit**.

Delete	Administrator	Creation Date	Edit Account
<input type="checkbox"/>	<input type="text" value=""/> ▾	<input type="text" value=""/> 📅 ▾	<input type="checkbox"/>
✕	Coaching Inc.	8/8/2019	Edit
✕	ABC Enterprises	1/25/2019	Edit
✕	Wilson Chu	8/8/2019	Edit
✕	Manuel Suarez Inc.	1/31/2019	Edit

STEP 3

To make a product available to a sub-user, select the checkbox beside the product icon. If you want to remove access to a product, deselect the checkbox.

Note: When a new product is added to your account, it is not automatically enabled for sub-users. You must make it available to them by following the steps above.

Opening Sub-User Accounts

STEP 1

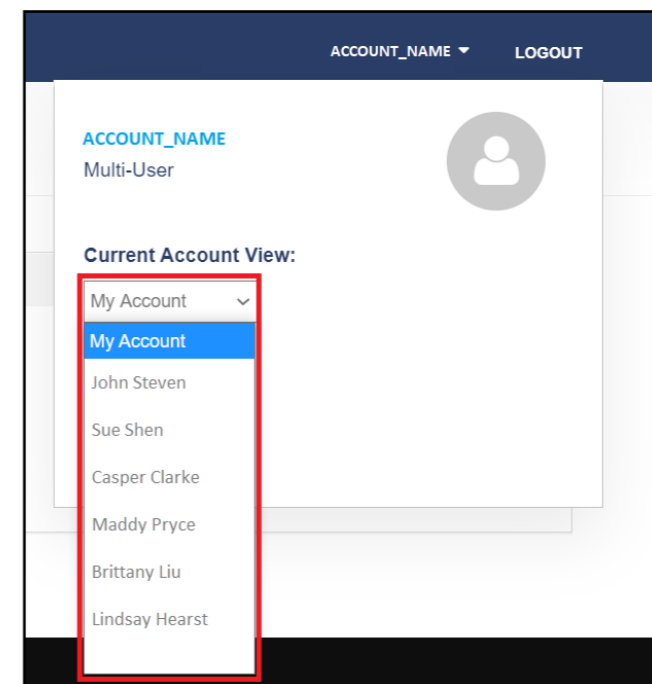
To open a sub-user account (thereby allowing you to view the participants and reports associated with that account), click the **name of your account** in the top-right corner of the screen.

ACCOUNT_NAME ▾ LOGOUT

A window will open with a drop-down menu of your sub-user accounts.

STEP 2

To open an account, look at the menu and click the name of the sub-user whose account you want to see.



When you open a sub-user's account, you are taken to their home page. From there you can view the sub-user's participants and generated reports.

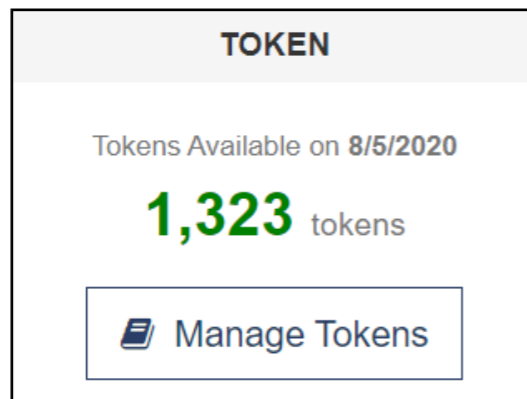
To return to your own home page, 1) click the name of your account at the top of the screen, and then 2) select "My Account" from the drop-down menu.

Purchasing Tokens

As a Multi-User, you can purchase tokens from MHS. Your sub-user accounts can not purchase tokens on their own. They must receive tokens from you, as described on page 12.

STEP 1

Click **Manage Tokens** on the home page.

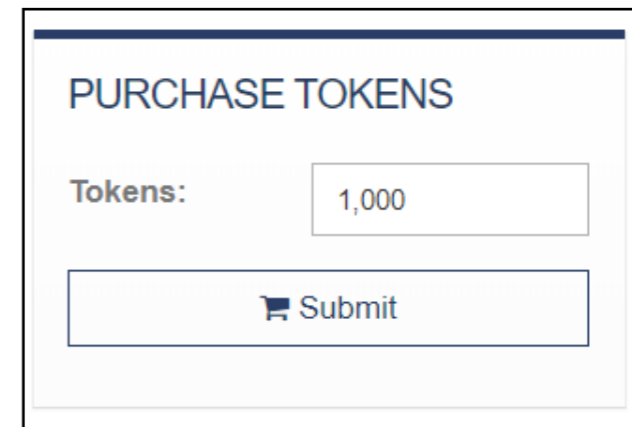


The Manage Tokens page appears. On the right side of the page is the Purchase Tokens widget.

STEP 2

Enter the number of tokens you want to purchase in the **Tokens** box.

Click **Submit**.



STEP 3

When you click **Submit**, a new window opens that displays the purchase page at MHS.com. Please see the next page for details.

EXPRESS CHECKOUT

shop Pay

G Pay

OR

CONTACT INFORMATION Already have an account? [Log in](#)

Email
Scott.Simpson@work.com

Keep me up to date on news and exclusive offers

BILLING ADDRESS

Company

Address

Apartment, suite, etc. (optional)

City

Country/Region
United States

State
State

ZIP code

Phone ?

< Return to cart

Continue to payment

← If you have an account with **Shopify** or **Google Pay**, click the appropriate icon to access the Express Checkout.

← Do not change the email address. The address listed connects your token purchase to your account at the Talent Assessment Portal. If you change the address, you might not receive the tokens you buy.

← Enter your billing address and phone number. (Note: This section is not applicable if you selected the Shopify or Google Pay option above).

← When you are finished entering your information, click **Continue to payment**.

STEP 4

MHS ASSESSMENTS

Cart > Information > Payment

Contact: youremailaddress@work.com [Change](#)

Billing: ABC Incorporated, 567 Main Street, Toronto ON M4K 1Y3, Canada [Change](#)

MHS Token	\$200.00
Subtotal	\$200.00
Taxes	\$26.00
Total	CAD \$226.00

PAYMENT
All transactions are secure and encrypted.

Credit card VISA MasterCard AMEX

Card number

Name on card

Expiration date (MM / YY) Security code

[Return to information](#) [Pay now](#)

1. Confirm your contact information and the token amount you are purchasing.
2. Enter the details of your credit card.
3. When you're done, click **Pay now**. You will be taken to a page that confirms your transaction.

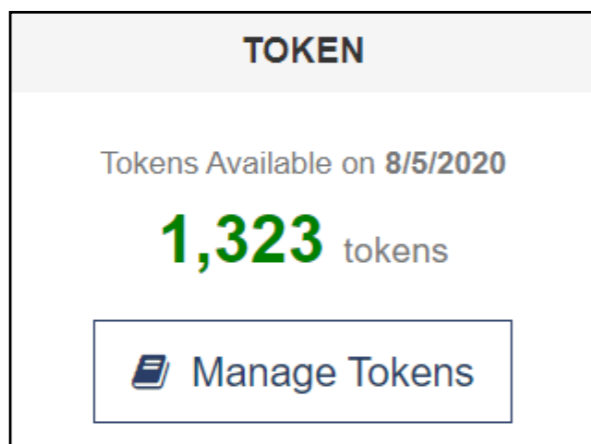
Transferring Tokens to Sub-Users

In order for sub-users to have tokens to generate reports, you must either 1) transfer tokens to specific sub-users, or 2) enable your token pool.

To transfer tokens...

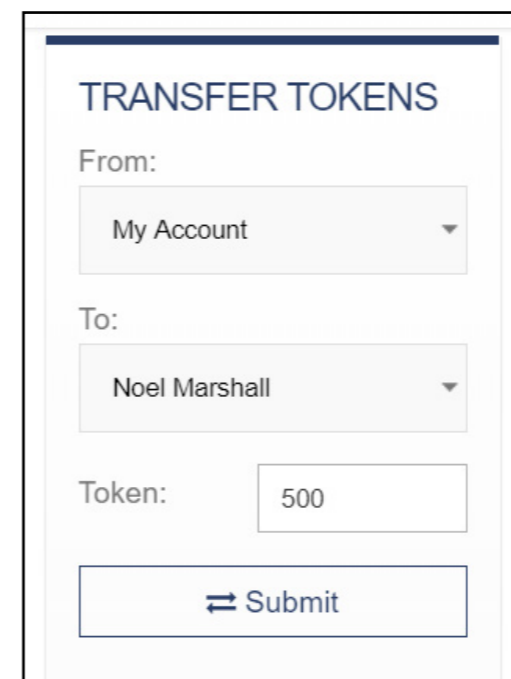
STEP 1

Click **Manage Tokens** on the home page.



STEP 2

The Manage Tokens page will open. It has a Transfer Tokens section on the right.



The screenshot shows a form titled "TRANSFER TOKENS". It has three main sections: "From:" with a dropdown menu showing "My Account"; "To:" with a dropdown menu showing "Noel Marshall"; and "Token:" with a text input field containing "500". At the bottom is a "Submit" button with a double arrow icon.

To transfer tokens to a specific sub-user:

1. Select "My Account" in the **From** menu.
2. Select the sub-user you want to transfer the tokens to in the **To** menu.
3. Enter the number of tokens you want to transfer in the **Tokens** box.
4. Click **Submit**.

The tokens you transferred will now be added to that sub-user's account.

At the same time, the number of tokens transferred will be deducted from your own account balance.

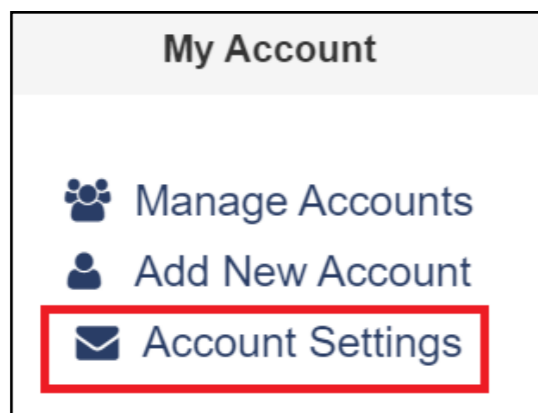
Enabling the Token Pool

If you don't want to distribute tokens to individual sub-users, you can make all of your tokens equally available to all users. You accomplish this by enabling the Share Token Pool.

To ENABLE THE TOKEN POOL...

STEP 1

Click **Account Settings** on the home page.



STEP 2

The Account Settings page will open.

At the bottom of the page, in the Share Token Pool section, select the **Enable** button and then click **Save Changes**.



All of your sub-users will now have equal access to the tokens in your account.

Note: The default setting for the sharing of tokens is **Disable**, which means that you must change this setting if you want to enable the token pool.

Keeping Track of Transfers

All of your token transfers are listed in the Manage Tokens table.

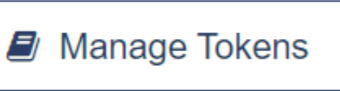
STEP 1

To view your transfers, click **Manage Tokens** on the home page.

TOKEN

Tokens Available on 8/5/2020

1,323 tokens

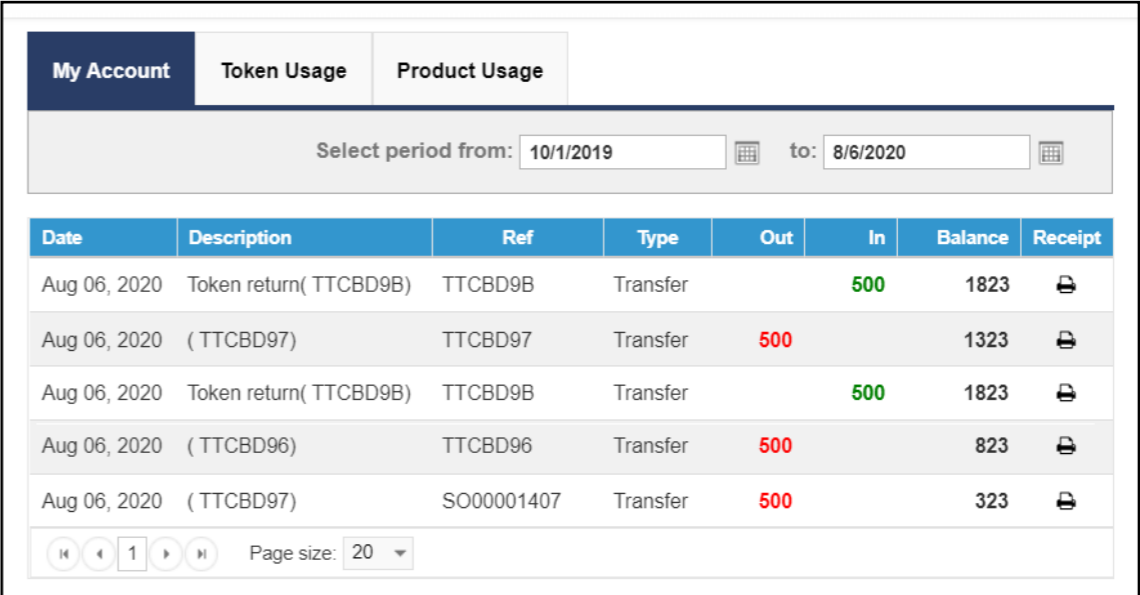
 Manage Tokens






STEP 2

The Manage Tokens table displays records of all transfers.

To view transactions from a specific time period, select a **From** and **To** date from the applicable drop-down menus.

To print a detailed receipt, click the print icon for the desired transaction.



Date	Description	Ref	Type	Out	In	Balance	Receipt
Aug 06, 2020	Token return(TTCBD9B)	TTCBD9B	Transfer		500	1823	
Aug 06, 2020	(TTCBD97)	TTCBD97	Transfer	500		1323	
Aug 06, 2020	Token return(TTCBD9B)	TTCBD9B	Transfer		500	1823	
Aug 06, 2020	(TTCBD96)	TTCBD96	Transfer	500		823	
Aug 06, 2020	(TTCBD97)	SO00001407	Transfer	500		323	

Page size: 20

Viewing Product Usage

The product usage page displays a breakdown of the tokens your sub-users spent on the talent assessment products.


STEP 1

To view product usage, click **Manage Tokens** on the home page.

TOKEN

Tokens Available on 8/5/2020

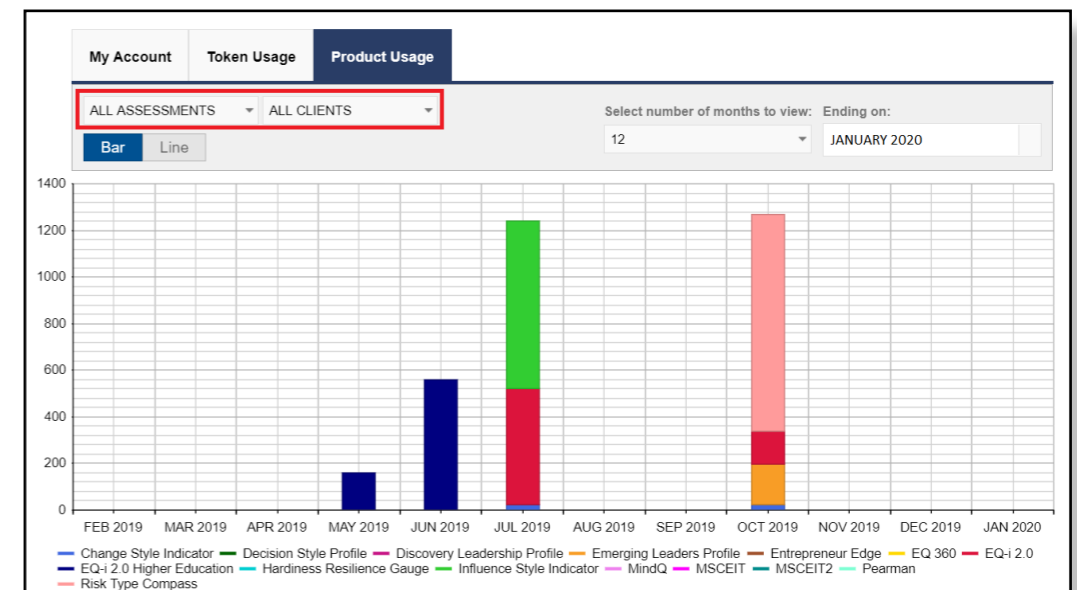
1,323 tokens

 **Manage Tokens**

STEP 2

Click the **PRODUCT USAGE** tab.

The Product Usage table appears.



The default is to show the number of tokens spent on all assessments by all of your sub-users. To show the number of tokens spent on a specific product, select the product name from the Assessments drop-down list.

To show the number of tokens spent on products by a specific sub-user, select the sub-user's name from the Clients drop-down list.

Who Are We?

A leading publisher of scientifically validated assessments for more than 30 years, Multi-Health Systems Inc. (MHS) serves clients in corporate, clinical, educational, public safety, government, military, pharmaceutical, and research settings. With offices in North America and partners around the world, MHS is dedicated to strong product growth, and an optimal user experience. MHS has developed leading products such as the Emotional Quotient Inventory (EQ-i 2.0®), the Conners™ suite of ADHD assessments, and the Level of Service™ suite of assessments.

The MHS line of Talent Assessments specialize in emotional intelligence, entrepreneurship, risk tolerance, and meeting facilitation. These range of tools measure and manage talent and are ideal for use in coaching, organization and leadership development, selection, and succession planning.

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