TA Portal

Getting Started Guide

Multi-User Accounts

MHS

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.

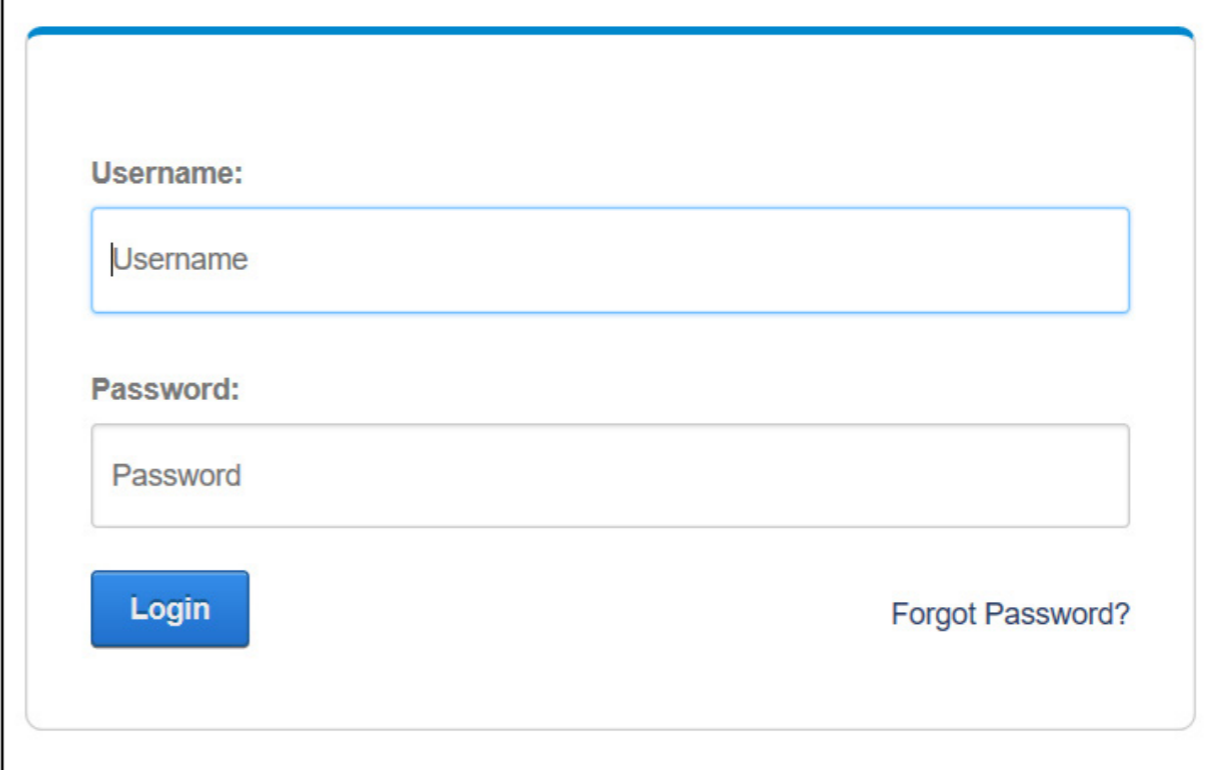**MULTI-USER**

| SUB-USER | SUB-USER | SUB-USER | SUB-USER |

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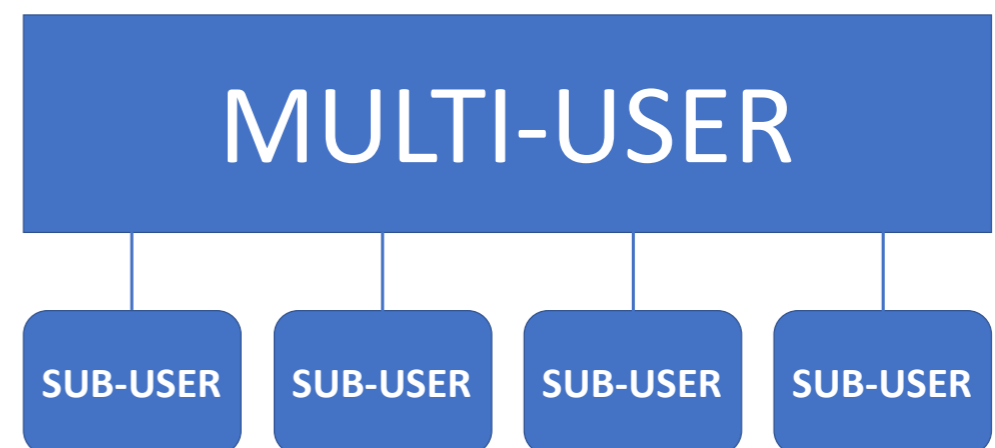
Logging In

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

1. Enter your user name

2. Enter your password

3. Click **Login**

Username:

Username

Password:

Password

Login   Forgot Password?

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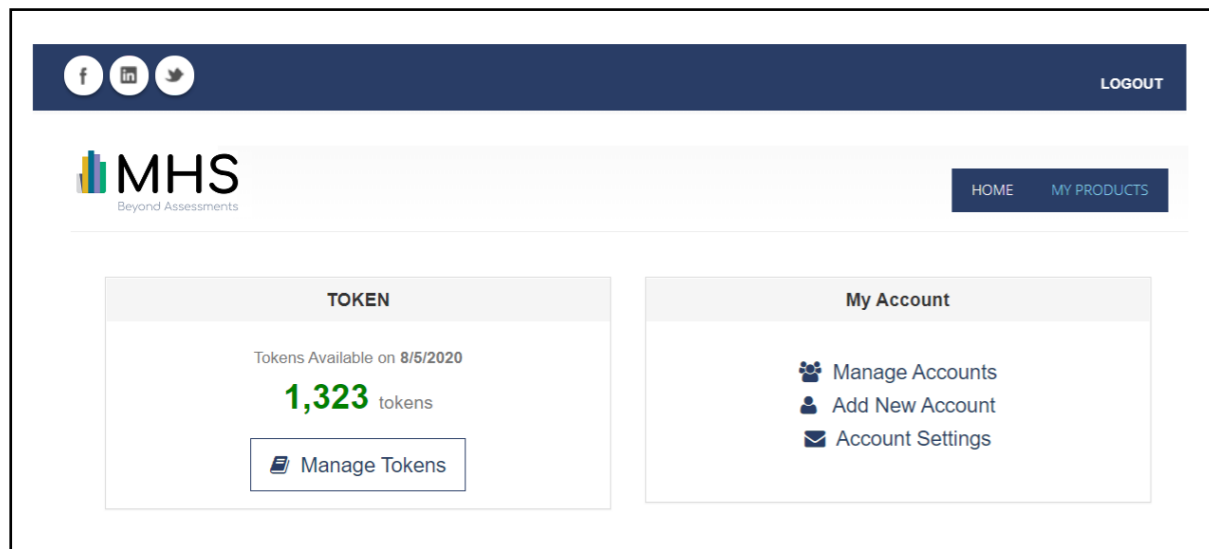
Your Home Page

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

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.

My Account

👥 Manage Accounts
👤 Add New Account
✉ Account Settings
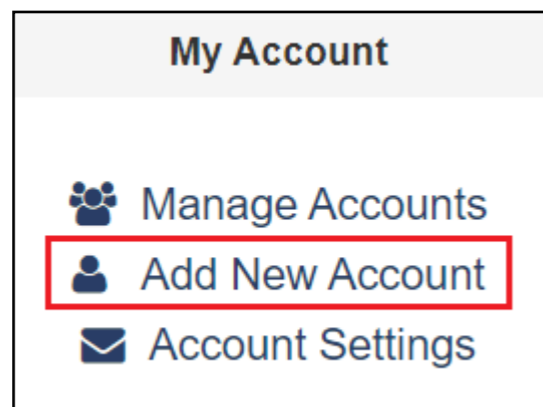
STEP 2

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: Larry Brown

Email Address: larrybrown@researchassociates.com
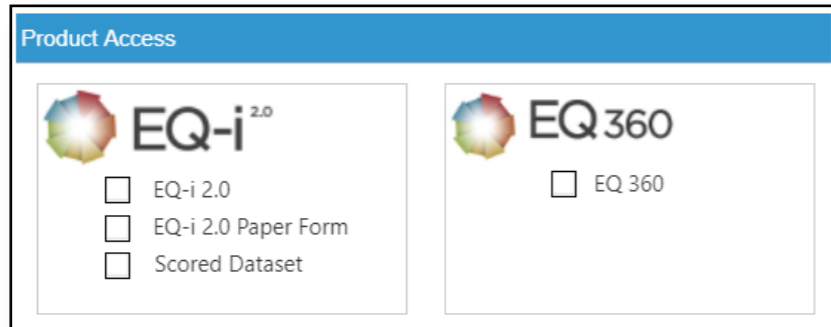
A new password for this account will be automatically generated and emailed to the user

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.

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STEP 3

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.
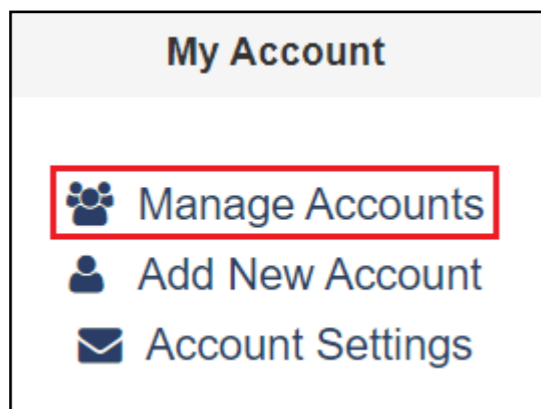
STEP 2

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**.

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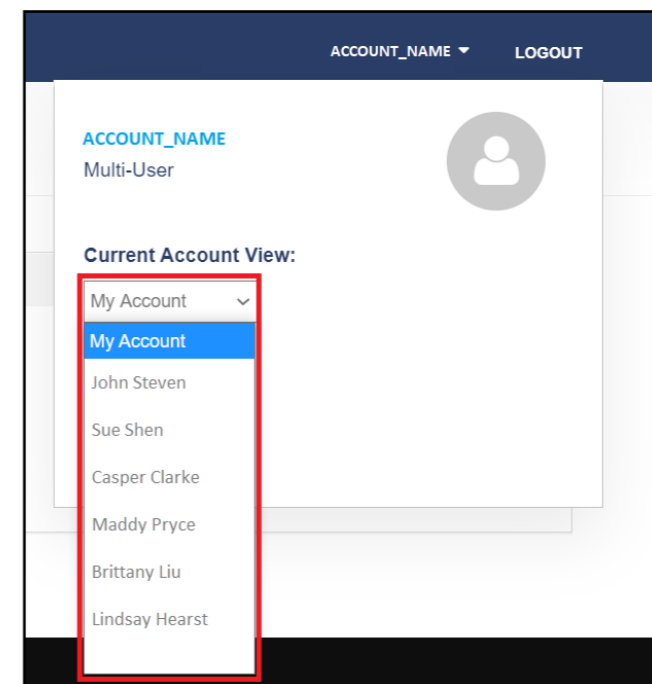
When you open a sub-user's account, you are taken to their home page. From there you can view the sub-user's participants and generated reports.

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.

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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.

TOKEN

Tokens Available on **8/5/2020**
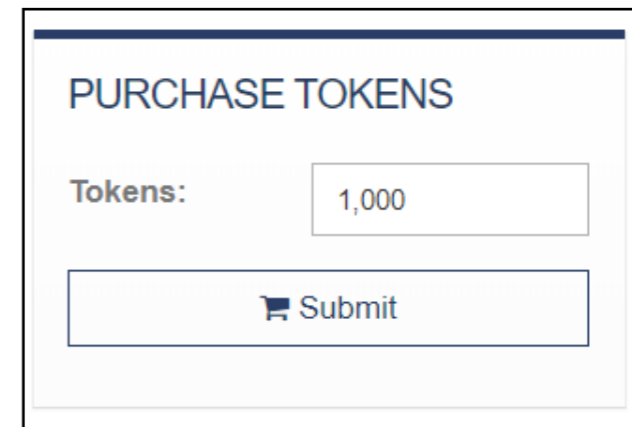
1,323 tokens
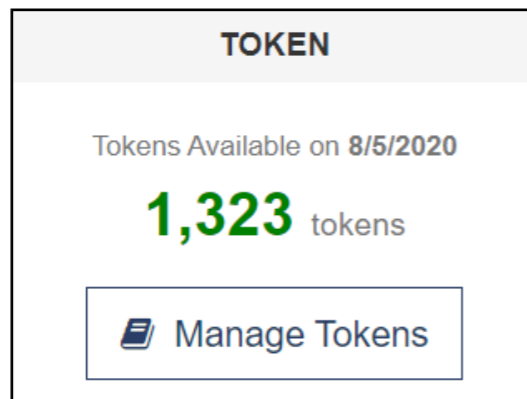
📖 Manage Tokens

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**.

PURCHASE TOKENS

Tokens: 1,000

🛒 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.

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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

First name | Last name

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**.

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STEP 4

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.
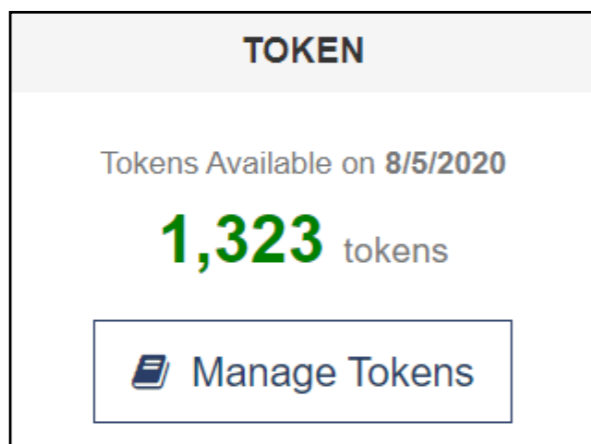
Transferring Tokens to Sub-Users

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.
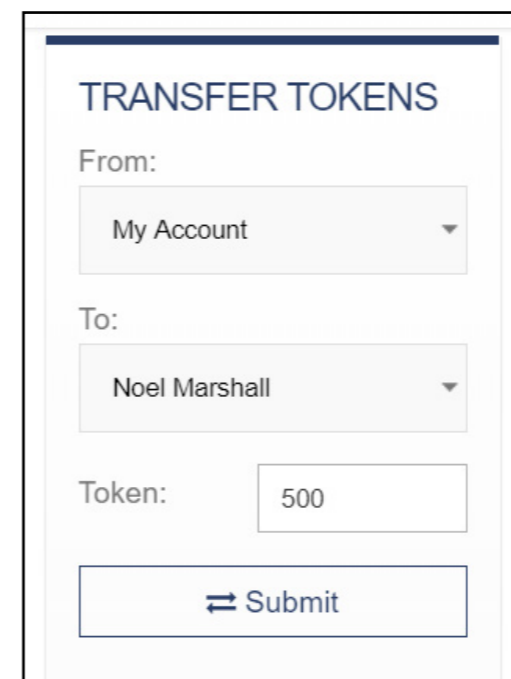
To transfer tokens...

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

TOKEN

Tokens Available on **8/5/2020**

1,323 tokens

📘 Manage Tokens

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

TRANSFER TOKENS

From:

My Account

To:

Noel Marshall

Token: 500

⇄ Submit

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.
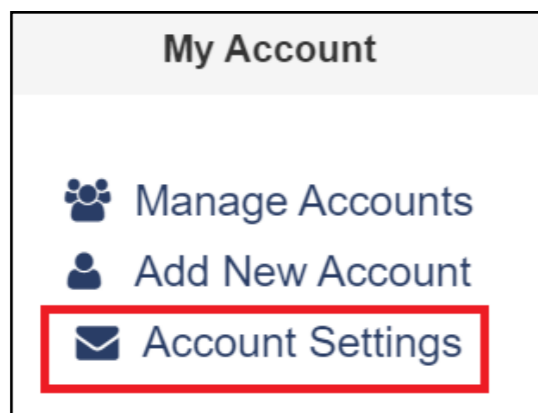
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Enabling the Token Pool

If you don't want to distribute tokens to individual sub-users, you can make all of your tokens equally available to <u>all</u> 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.

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Keeping Track of Transfers

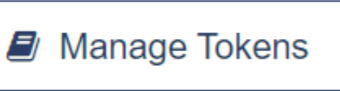All of your token transfers are listed in the Manage Tokens table.

STEP 1

To view your transfers, click **Manage Tokens** on the home page.
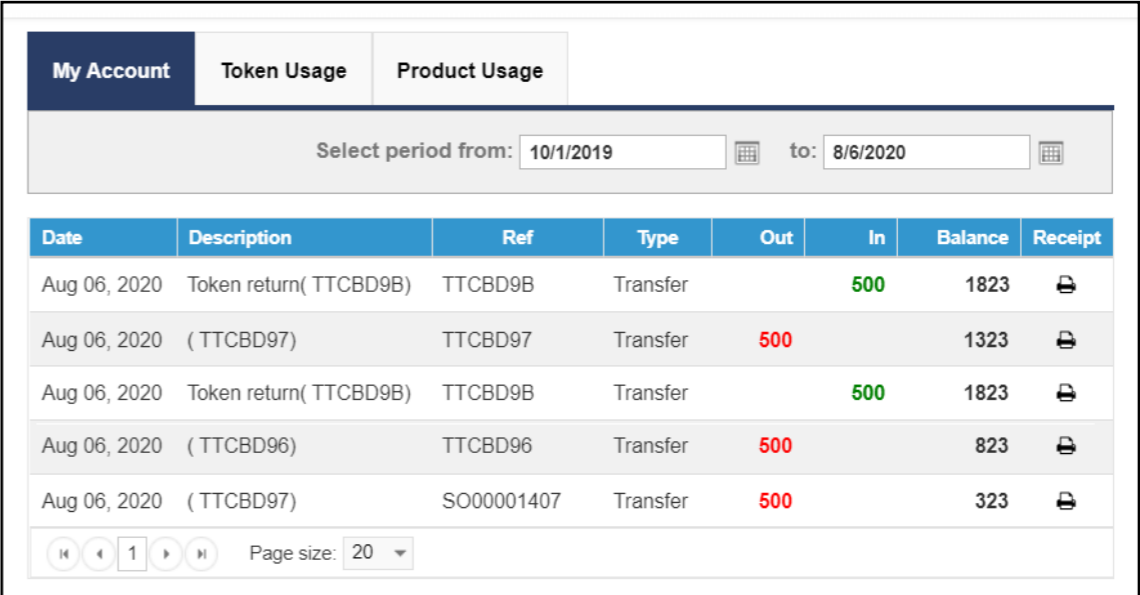
STEP 2

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.

Viewing Product Usage

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

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

TOKEN

Tokens Available on **8/5/2020**

1,323 tokens

📖 Manage Tokens

Click the **PRODUCT USAGE** tab.

The Product Usage table appears.
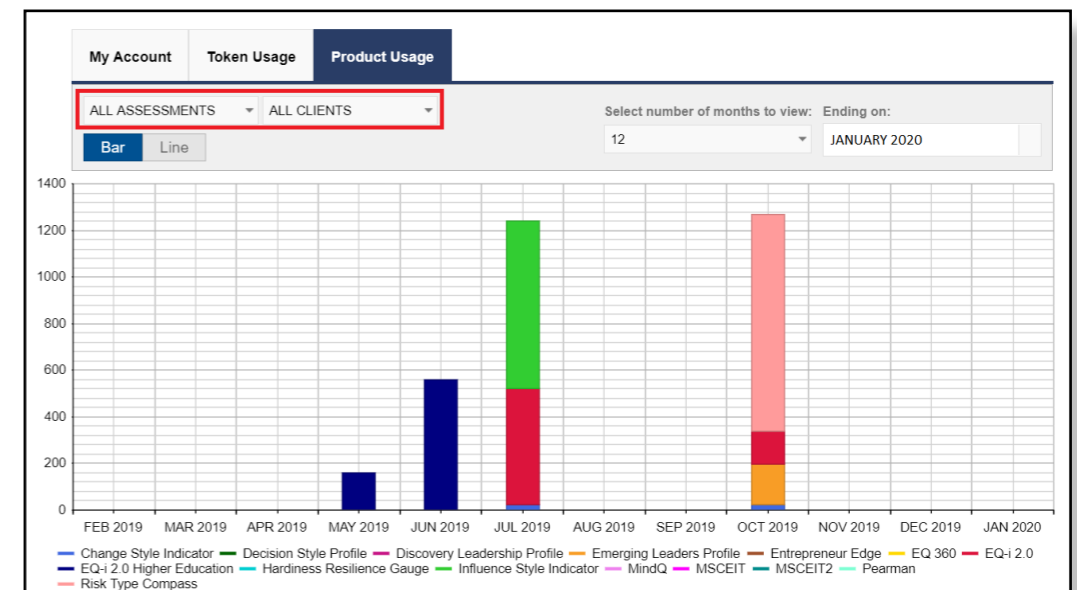
The default is to show the number of tokens spent on <u>all</u> assessments by <u>all</u> of your sub-users. To show the number of tokens spent on a specific product, select the product name from the Assessments drop-down list.

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.

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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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