

# TA Portal Getting Started Guide

## Distributor 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 lists various assessment tools in a grid, 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 Sales Aptitude Profile, and CS AP CS Aptitude Profile. 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 multiple "Aug 06, 2020" entries. At the bottom, a table shows transaction history with columns for date, ID, type, amount, and balance. A "PURCHASE TOKENS" section at the bottom right has a "Tokens:" input field set to 0 and a "Submit" button.

Date	ID	Type	Amount	Balance
Aug 06, 2020	(TTCBD96)	Transfer	500	823
Aug 06, 2020	(TTCBD96)	Transfer	500	823
Aug 06, 2020	(TTCBD96)	Transfer	500	823

# Introduction



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

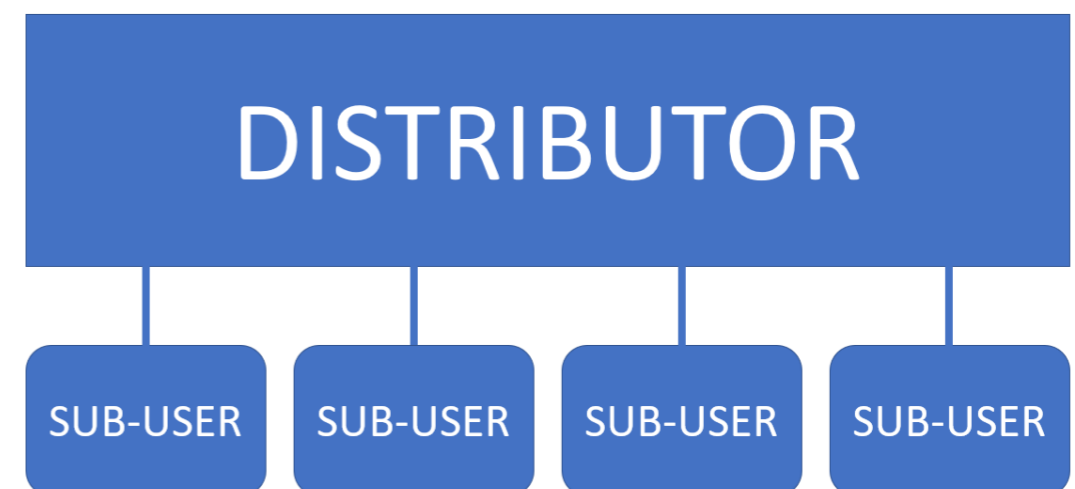
*This getting started guide will show you how to conduct the most commonly performed tasks.*

## WHAT IS A DISTRIBUTOR?

A **distributor** is a designation given by MHS to individuals or organizations that sell tokens and provide product access to other accounts, referred to as **sub-user accounts**.

The distributor 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 purchase tokens from the distributor.

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



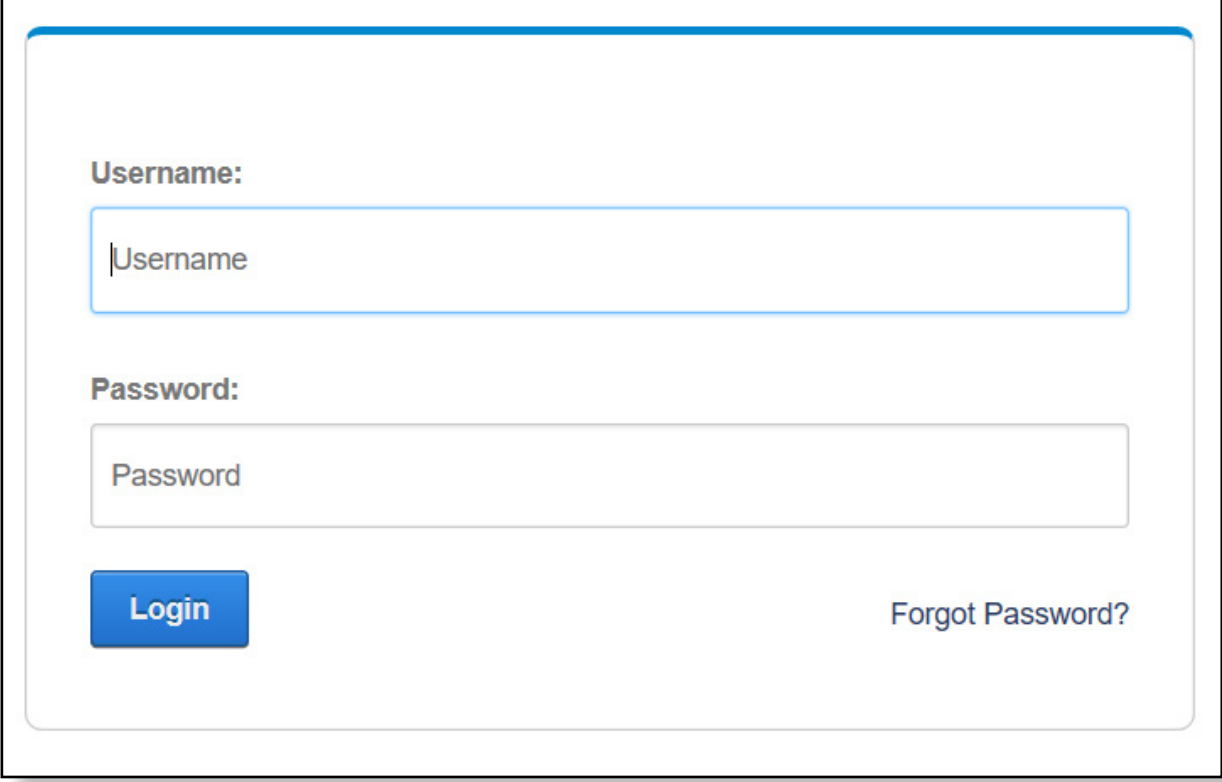
# Logging In

## STEP 1

To log in to the Talent Assessment portal, go to [tap.mhs.com](https://tap.mhs.com)

## STEP 2

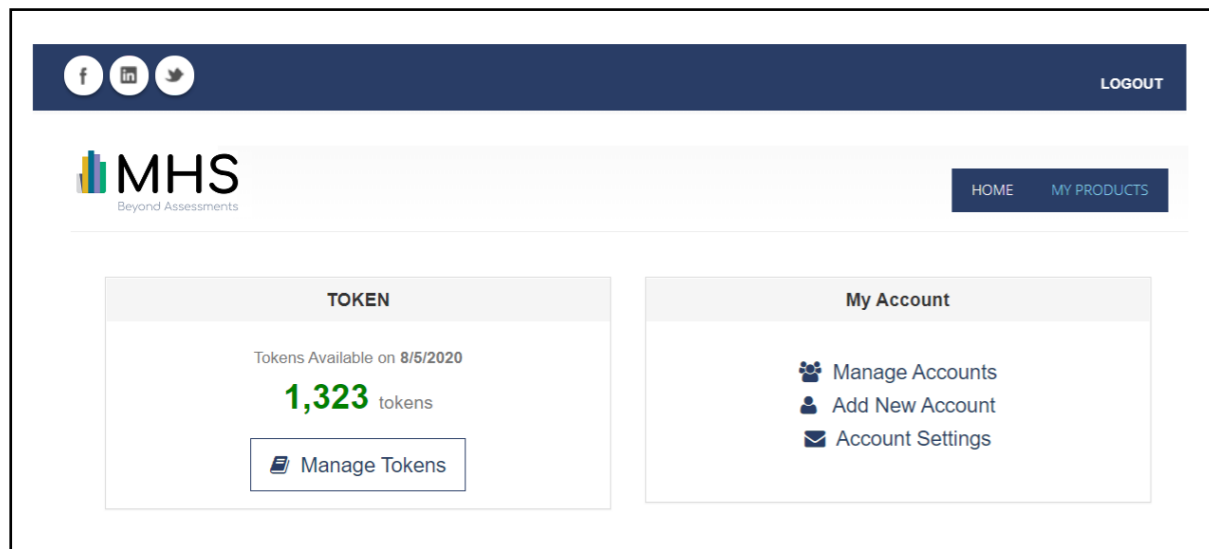
1. Enter your user name
2. Enter your password
3. Click **Login**



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 a vertical cursor on the left. The placeholder text "Password" is visible.
- Login:** A blue rectangular button with white text.
- 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 distributor 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.

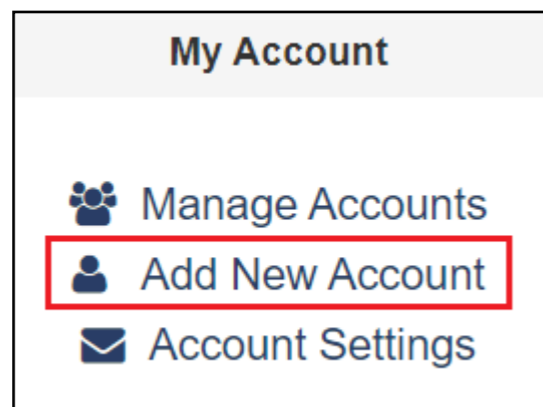
As a distributor, you do not see these icons when you log-in because your account is set up for administration only.

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** in the My Account section of 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

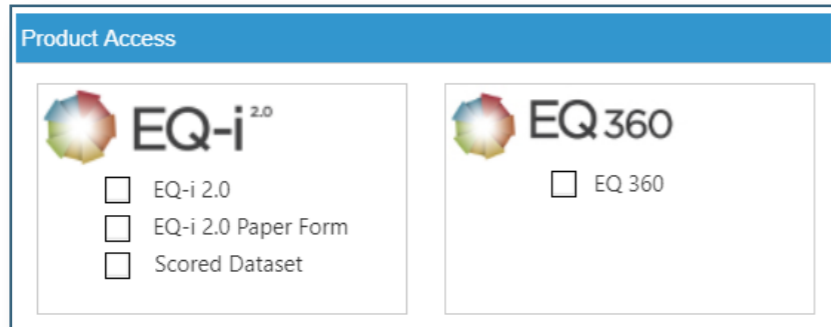
Account Name:

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' section 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

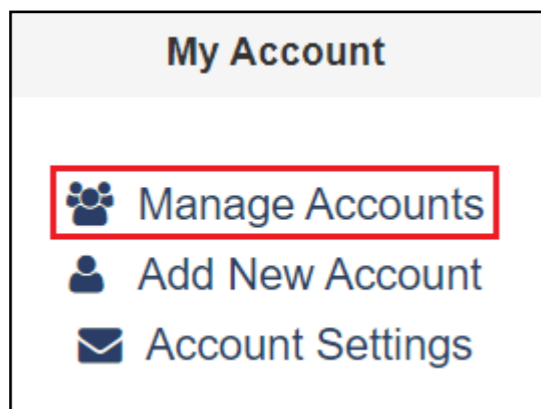
When a distributor account is set up by MHS, it does not include the ability to invite participants and conduct assessments.

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** in the My Account section of the home page.



## STEP 2

To assign a new password, modify access to products, or make changes to the sub-user's name and email address, click **Edit**.

Manage Accounts

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

## 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.

# Purchasing Tokens

As a Distributor, you usually purchase tokens from your sales rep at MHS. However, there might be times when you want to purchase tokens through the Talent Assessment Portal.

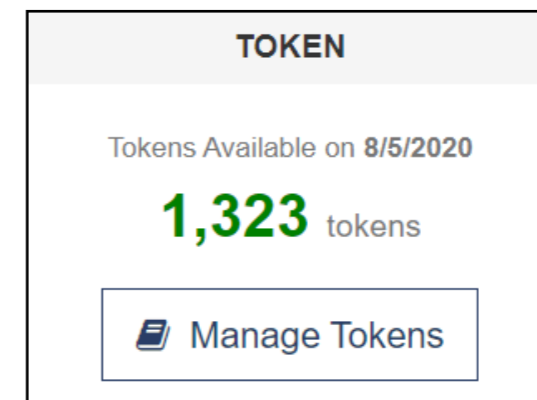
## NOTE

If you purchase tokens in this manner, you will not receive the distributor discount. If you want to receive this discount, you must purchase the tokens from your sales representative.

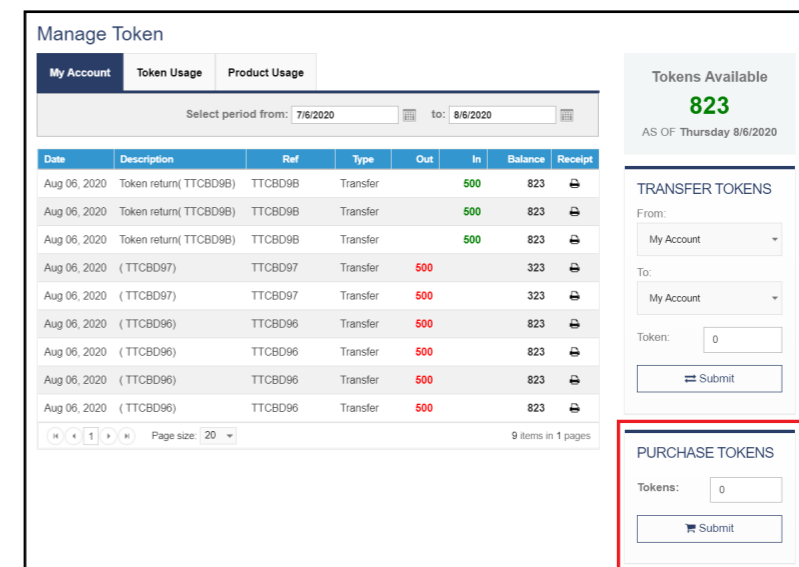
If you want to purchase tokens from the portal, use the following instructions.

## 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.

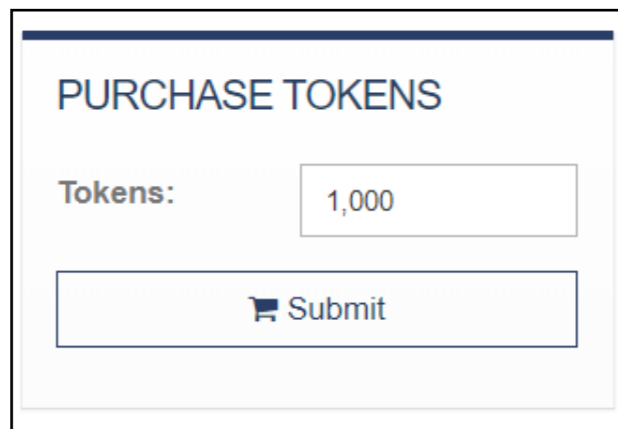




## STEP 2

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

Click **Submit**.



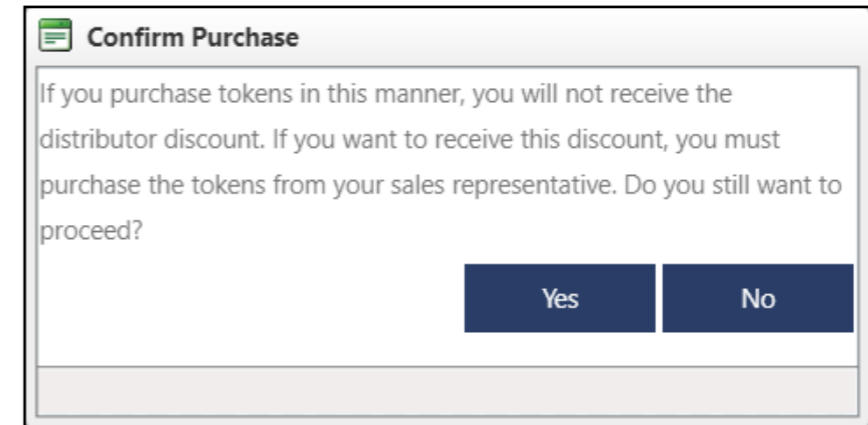
PURCHASE TOKENS

Tokens:

## STEP 3

A pop-up informs you that you will not receive your distributor discount if you continue.

If you want to proceed with your purchase, click **Yes**.



Confirm Purchase

If you purchase tokens in this manner, you will not receive the distributor discount. If you want to receive this discount, you must purchase the tokens from your sales representative. Do you still want to proceed?

## STEP 4

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

EXPRESS CHECKOUT

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  State  ZIP code

Phone

[< Return to cart](#)

← 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 5

The screenshot shows the MHS ASSESSMENTS payment interface. At the top left is the MHS ASSESSMENTS logo. Below it is a breadcrumb trail: Cart > Information > Payment. A red box labeled '1.' encompasses the contact and billing information fields. The contact field shows 'youremailaddress@work.com' with a 'Change' link. The billing field shows 'ABC Incorporated, 567 Main Street, Toronto ON M4K 1Y3, Canada' with a 'Change' link. To the right, a summary table shows 'MHS Token' for \$200.00, 'Subtotal' for \$200.00, 'Taxes' for \$26.00, and a 'Total' of CAD \$226.00. Below this is the 'PAYMENT' section with the text 'All transactions are secure and encrypted.' A red box labeled '2.' encompasses the 'Credit card' form, which includes fields for 'Card number', 'Name on card', 'Expiration date (MM / YY)', and 'Security code'. At the bottom left is a '< Return to information' link, and at the bottom right is a blue 'Pay now' button, which is highlighted by a red box labeled '3.'

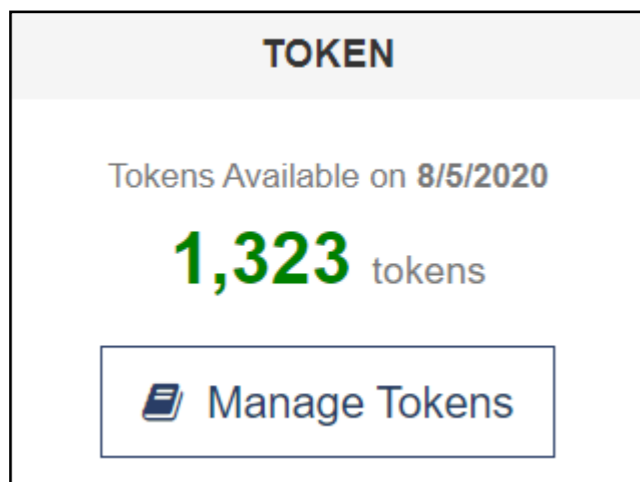
1. Confirm your contact information and the token amount you are purchasing.
2. Enter the details of your credit card.
3. When you're done, click **Pay now**. You will be taken to a page that confirms your transaction.

# Transferring Tokens to Sub-Users

In order for sub-users to have tokens to generate reports, you must transfer tokens to specific sub-users as described below.

## STEP 1

Click **Manage Tokens** in the Tokens section of the home page.



## STEP 2

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

A screenshot of a 'TRANSFER TOKENS' form. It has three main sections: 'From:' with a dropdown menu showing 'My Account'; 'To:' with a dropdown menu showing 'Coaching Inc.'; and 'Token:' with a text input field containing '1,000'. At the bottom is a 'Submit' button with a double-headed 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.

# 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

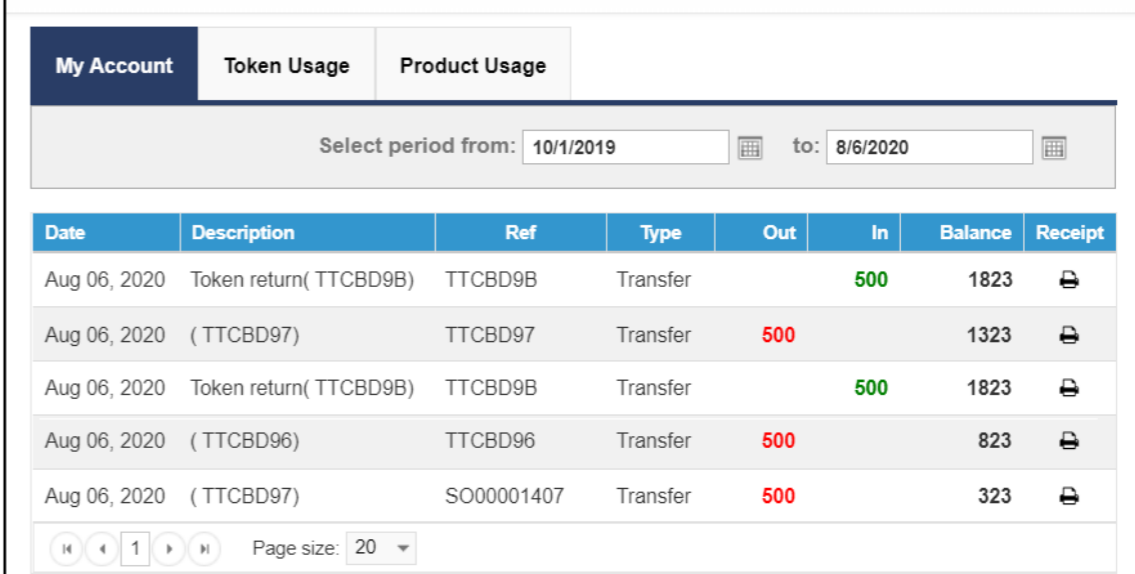
 Manage Tokens






## 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	

# 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

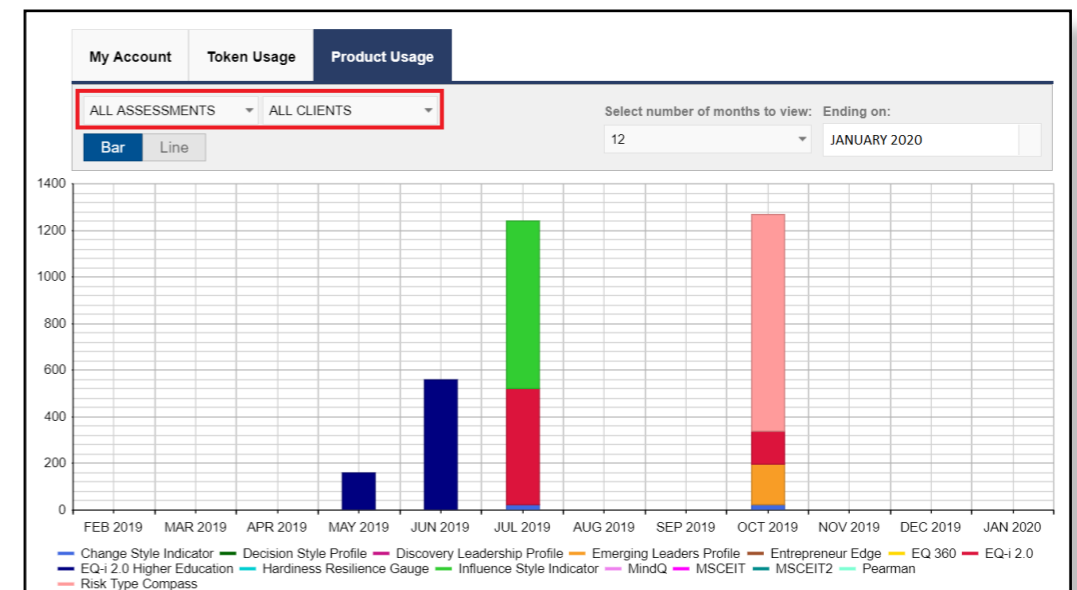
**1,323** tokens

 **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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