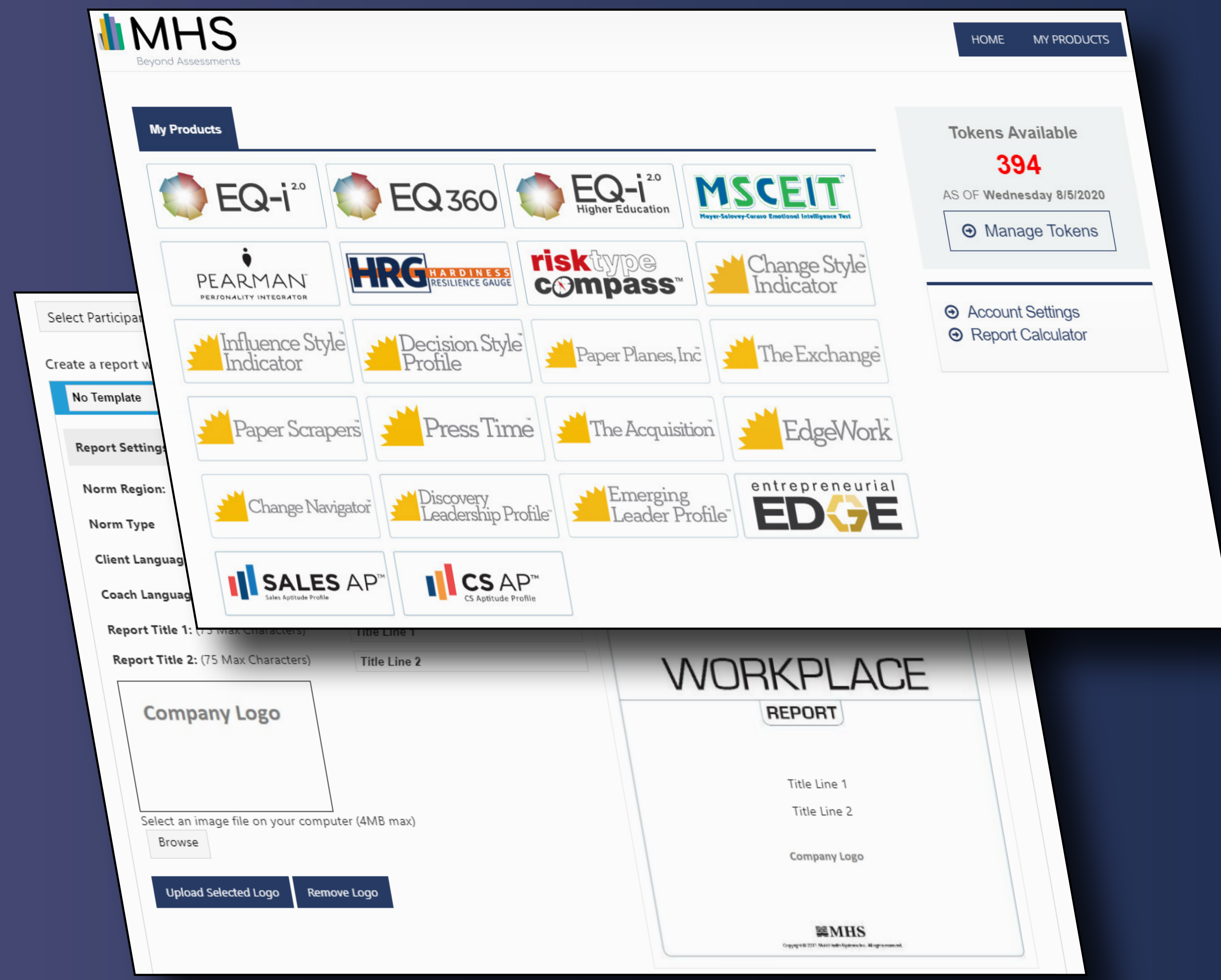
TA Portal

Getting Started Guide



Single-User Accounts

MHS

Introduction

The MHS Talent Assessment Portal (TAP) is the online assessment platform that is used by certified users to administer and manage their Talent suite of assessments. The portal gives users an easy way to invite and manage participants, send reminders, and generate reports.

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

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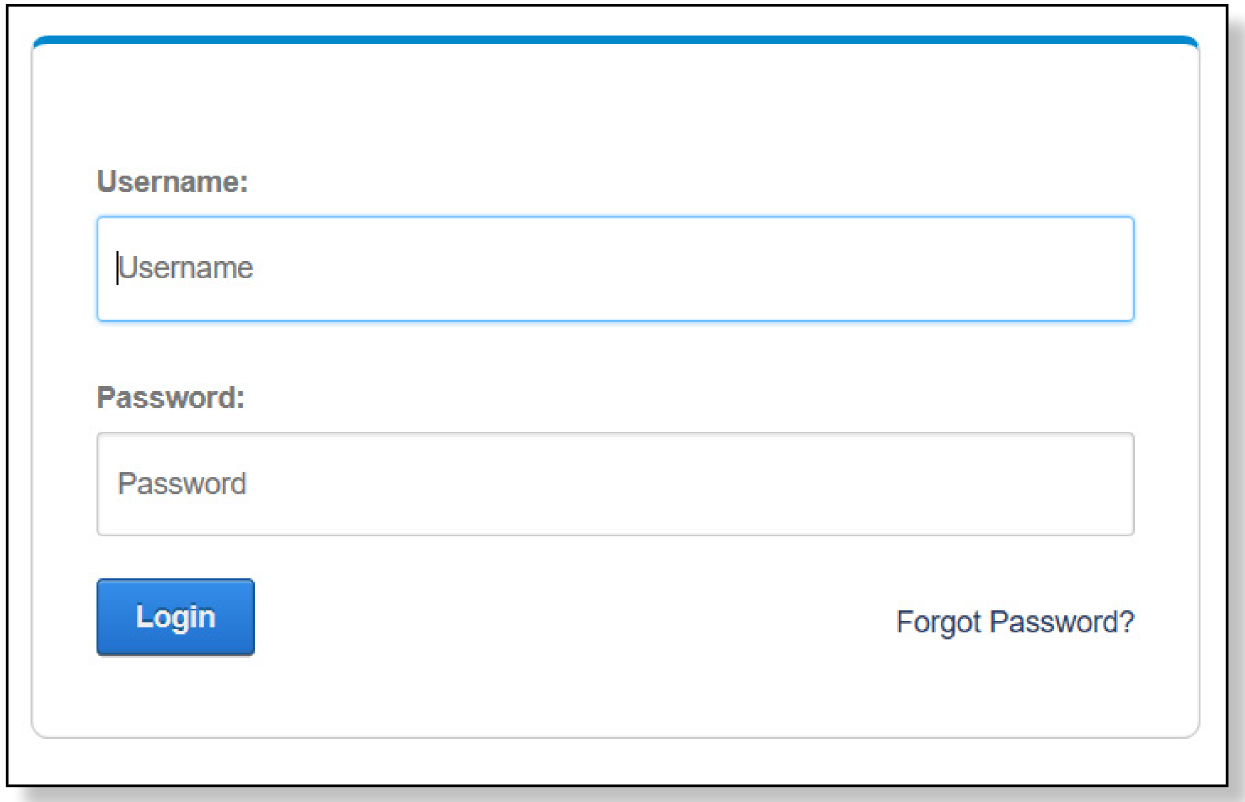
Logging In

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**

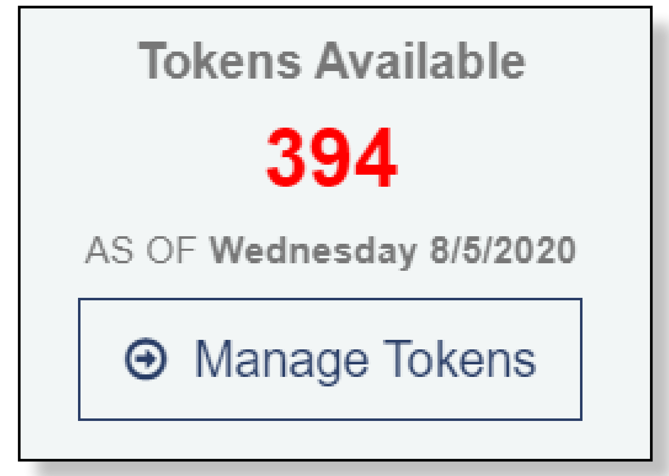


The Home Page

When you log in to the portal, you see the home page.

The home page displays the assessments that you have access to. To use a product, click the product icon.

The token widget shows you how many tokens you have left. To purchase additional tokens, click **Manage Tokens**.



NOTE

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

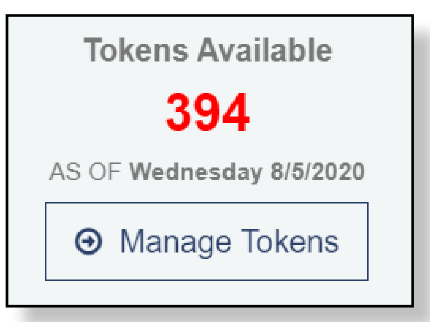
Purchasing Tokens

Tokens are required to purchase reports from the Talent Assessment Portal (TAP). If you do not have enough tokens in your TAP account, you will not be able to generate new reports. However, you can still send invitations to participants to complete a TAP assessment.

Tokens can be purchased from MHS at any time. Note that the tokens are deducted from your account when you generate a report, <u>not</u> when you send an invitation.

STEP 1

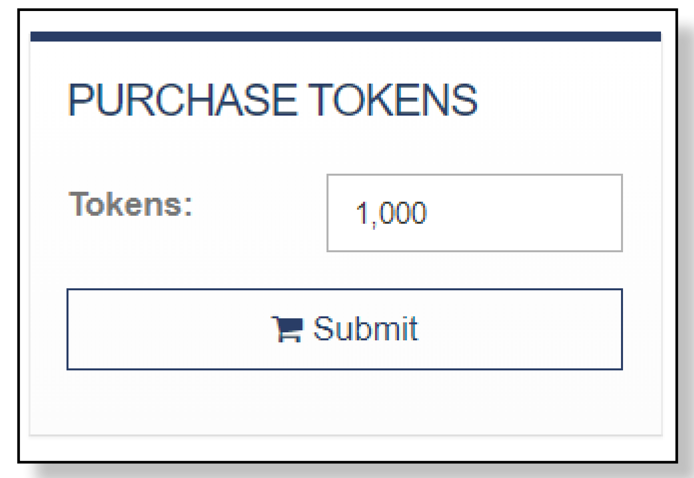
To purchase tokens from MHS, click the **Manage Tokens** link on the home page.



STEP 2

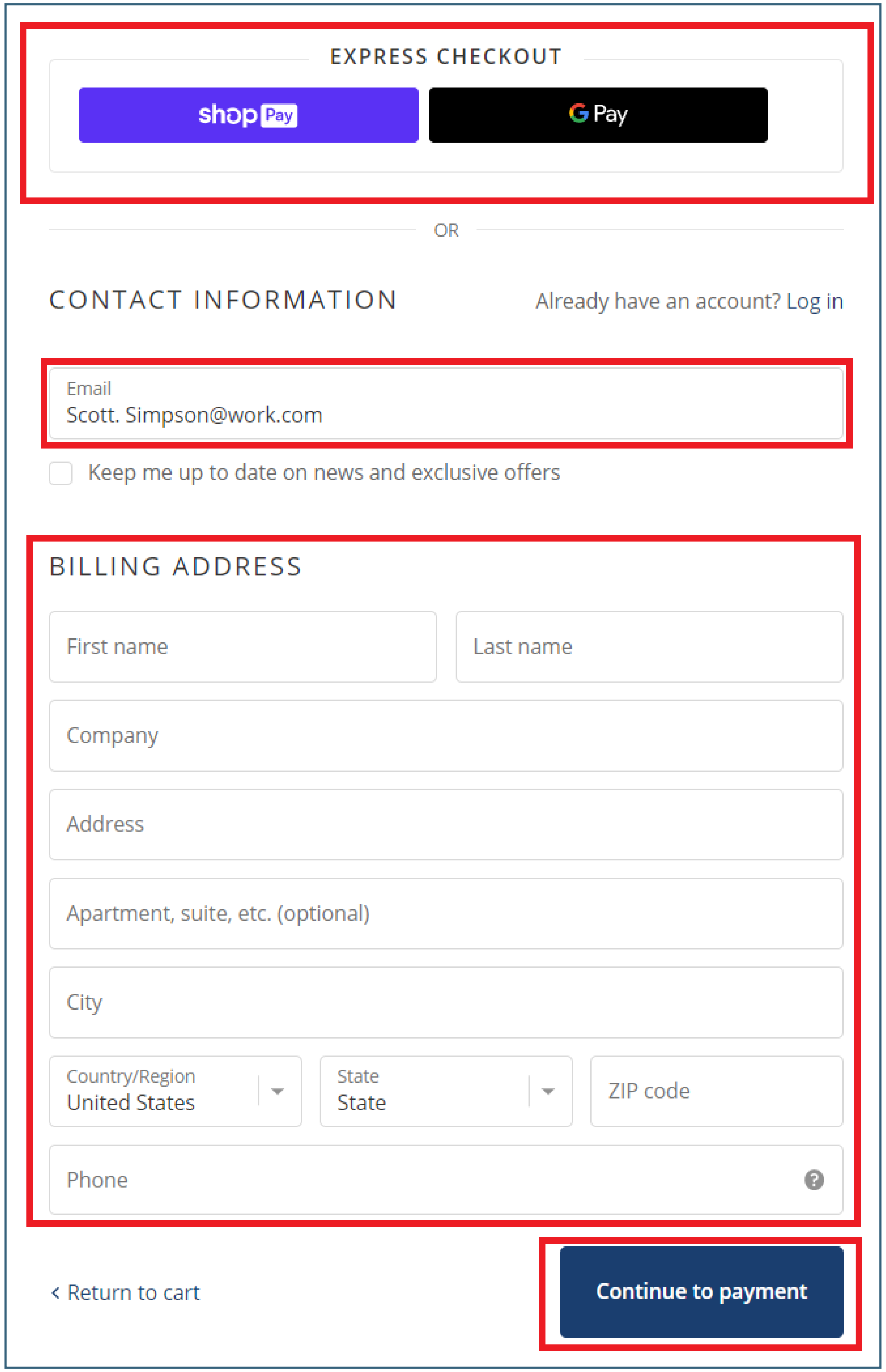
Enter the number of tokens you want to purchase in the Tokens box.

Click **Submit**.



STEP 3

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



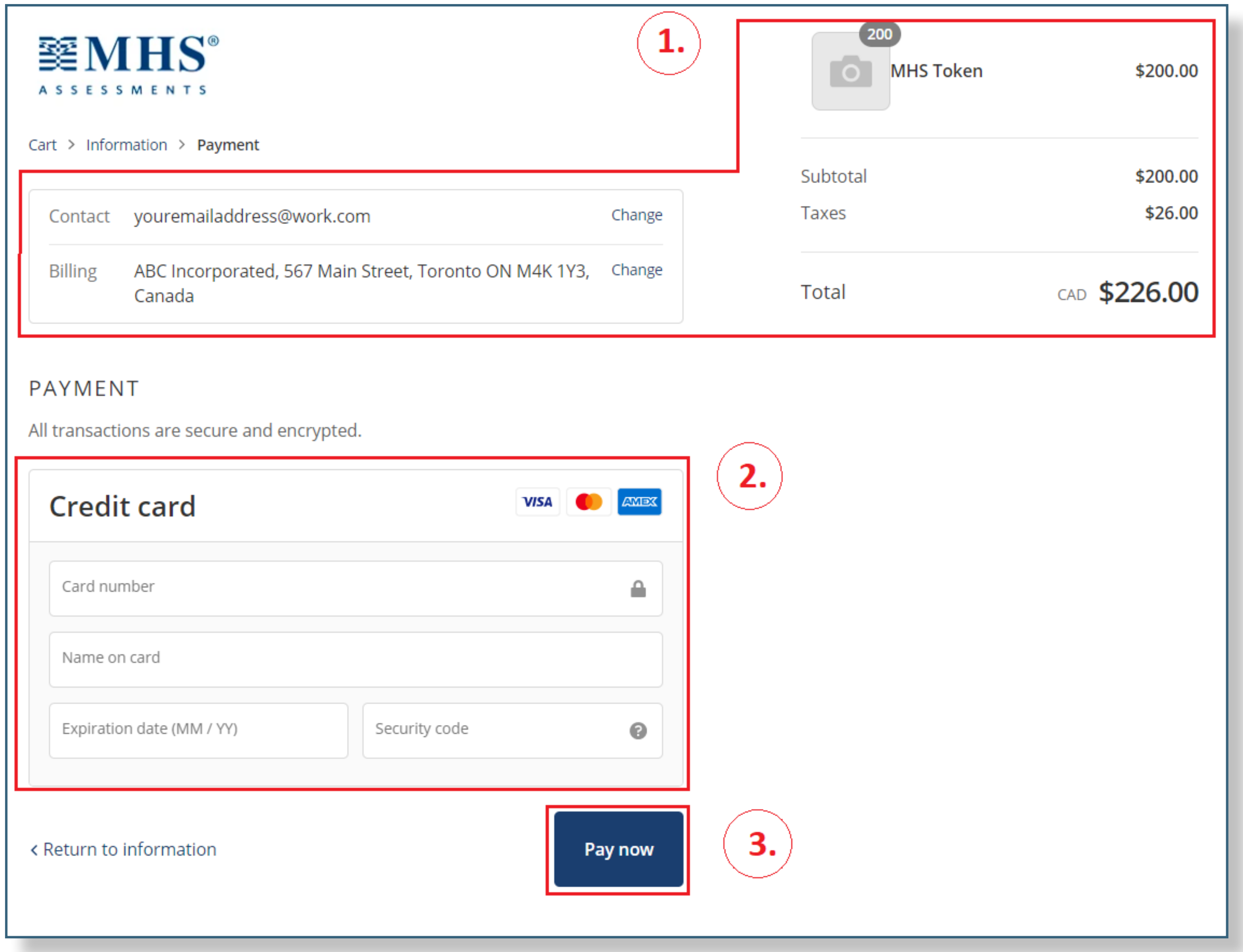
If you have an account with **Shopify** or **Google Pay**, click the appropriate icon to access the Express Checkout.

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

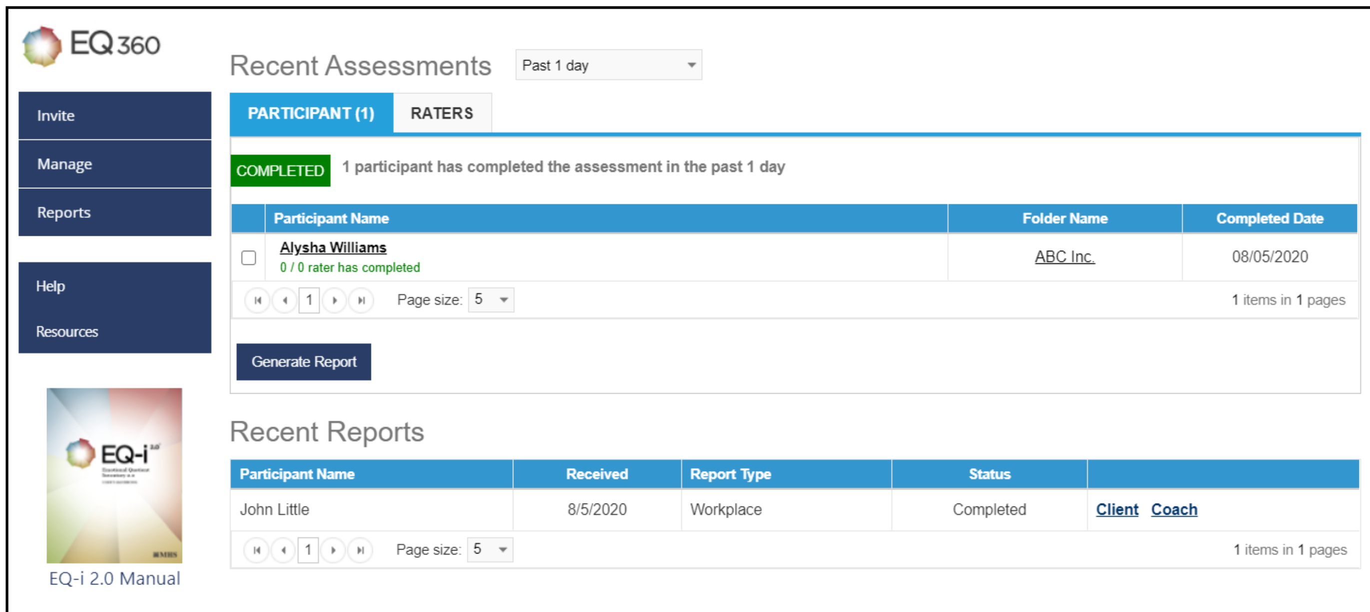


1. Confirm your contact information and the token amount you are purchasing.

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.

Conducting an Assessment



Most of the assessments on the Talent Assessment Portal follow the same Invite, Manage, Report procedure.

INVITE: Click Invite in the left menu to invite participants to take the assessment. You can either send each participant an email containing a unique link to complete the assessment online, or you can create an Open Invitation: A single link that can be used by multiple participants.

MANAGE: Click Manage in the left menu to manage your participants. You can update their name and email address, send reminders to pending participants, and delete participants.

REPORT: Click Reports in the left menu to generate reports for participants once they have completed the assessment. When you are finished, a link to download the report will appear on the My Reports page.

Sending Invitations

You invite a participant to complete an assessment by sending them a link to the assessment in a Personal Invitation or an Open Invitation.

Please note that there are variations in the invitation process depending on the product you select. For detailed instructions, consult the product help file by selecting a product on the Home Page and clicking Help in the left menu.

Personal Invitations

The personal invitation creates a unique link for a participant to access the online assessment.

To send a personal invitation:

1. Click **Invite** in the left menu, and then select **Personal Invitation**.
2. Select a language for the invitation email and assessment. Note that when the participant opens the assessment, they can select a different language to read the instructions and questions in.
3. Create a folder to organize the participants into.
4. Enter the name and email address of the participants, either one at a time, or by uploading multiple participants in an Excel spreadsheet.
5. Customize the text in the invitation email, or use the default text provided.
6. Click **Next** to go to the review page.

   Review the invitation settings. Click **Previous** to go back and make changes.
7. If everything looks good, click **Send Email**.

The entered participants will each receive an email containing a unique link to take the assessment.

Open Invitations

The Open invitation creates a single link that can be used by multiple participants. This is useful if you do not know the participants' email addresses or want to invite many people.

To use the open invitation:

1. Click **Invite** in the left menu, and then select **Open Invitation**.
2. Select a language for the assessment.
3. Give the invitation a name, and create a folder to organize the participants into.
4. Click **Generate Link**.

An open invitation link is generated. This link can be distributed to participants through any method. If you want to include instructions, you can copy the provided email text and link and send it through your own email account.

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Managing Participants

You can track assessment completion, send reminders, and delete participants, all on the Manage Page.

Please note that there are variations in the management process depending on the product you select. For detailed instructions, consult the product help file by selecting a product on the Home Page and clicking Help in the left menu.

To manage your participants, click **Manage** in the left menu. This opens the manage page.

Depending on the product, there are tabs for Assessments, Open Invitations, Groups, and Raters. Click the tab to select the category you want to deal with.

To see if a participant has completed the assessment, click the Assessments tab. A table opens with a list of participants invited to complete the assessment. The status column lets you know the stage that each participant is at:

- **Pending** means the participant has not completed the assessment.
- **Expired** means they have not completed the assessment and the assessment link is no longer valid.
- **Completed** means the participant has finished the assessment.
- **Scored** means they have completed the assessment and a report has been generated for them.

Clicking the name of a participant, open invitation, rater, or group, opens a page where you can edit the applicable details.

A drop-down menu allows you to send reminders to pending participants, reactivate expired links, generate reports, or delete participants/invitations.

To send a reminder to a participant to complete the assessment

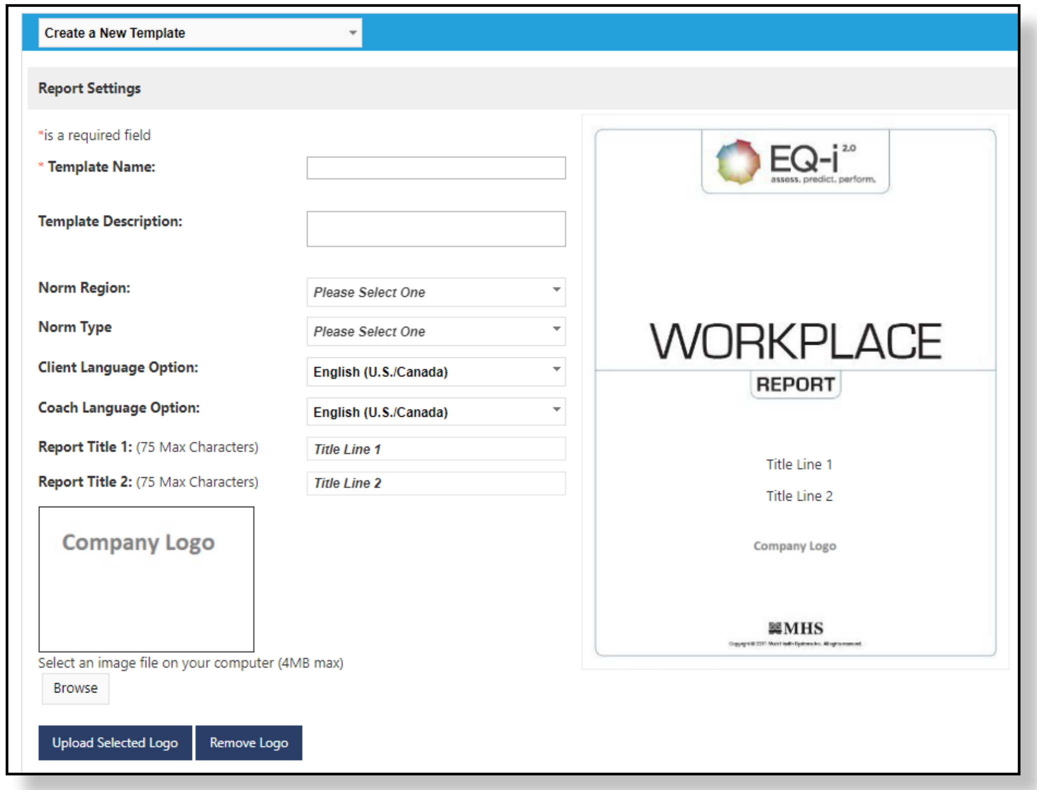
1. Click the **Assessments** tab.
2. Select the check box to the left of the participants that you want to send a reminder to. The participants should have a status of **Pending**.
3. Select **Send Reminders to Selected** from the *I would like to* drop-down menu.

   The email reminder text appears.
4. Make any required changes to the email by typing directly in the text box.
5. When you are satisfied with your email, click **Send Reminder Now**.
6. A pop-up message confirms that the reminder was sent. Click **Done** to close the message.

Generating Reports

After a participant completes an assessment, the next step is for you to generate a report.

Please note that there are variations in the report generation process depending on the product you select. For detailed instructions, please consult the product help file by selecting a product on the Home Page and clicking Help in the left menu.



To generate a report

1. Click **Reports** in the left menu.
2. Select the report type you want to generate.
3. Select the participants you want to generate a report for. You can usually select multiple participants, though with multi-rater products such as the EQ 360, you can only select a single participant.
4. Customize your report template. Depending on the assessment and report type, this can include selecting the language and norms for the report, adding a logo to your front page, and deciding what sections to include or exclude in the text.
5. Click **Save As Template** to save your customized template for use with other participants. To reuse this template, select it from the dropdown menu at the top of the page.
6. Click **Next** to go to the Review page. Look over the options you selected, and click **Previous** to go back and make changes.
7. Click **Place Order** to generate your report.
8. Click the **My Reports** tab to download a PDF of your report.

The first time you generate a report for a participant, you will be charged a specified number of tokens. Regenerating a previously generated report is free, unless the norm in the regenerated version is different than what was originally selected.

Frequently Asked Questions

How can I see what languages the assessments are available in?

Most of the Talent Assessments are available in languages other than English. You can view a list of language options during the invitation process by clicking the language dropdown menu. If you select a non-English language from the dropdown, the instructions and questions in the assessment will be displayed in the language you selected.

How can I see what languages the reports are available in?

The best spot to get this information is in TAP during the report generation process. On the Select Template page, click the language dropdown to see the list of available languages for the Coach and Client report. Note that the default language for all reports is English (U.S./Canada).

What happens if I generate a report in the wrong language?

You can change the language by regenerating the report (i.e., following the steps listed on the previous page). Changing the language in a regenerated report is always free. You will only pay for a report regeneration if you change the norm region or norm type from what was originally selected.

What do I do if I don't see a generated report on the My Reports page?

If the report link does not appear in the list after you completed the report generation process, click the **Refresh** button on the My Reports page, or set the Auto Refresh drop-down to **ON**.

Where can the prices (in tokens) for TAP reports be found?

You can find the price of a report by logging in to TAP, selecting a product from the home page, and clicking Reports in the left menu. The next page will display a list of reports for that product, along with the price (in tokens) for each report.

Some products will have "add-ons" (such as the EQ-i 2.0 Workbook) that can be added to the report during the report generation process. The price for these add-ons will be clearly stated when you select them.

Note that before you make any payment for a report, the review page will state the price of each report you are generating, with details of any additional charges.

What is the difference between a multi-user, sub-user, and single-user account?

Multi-user accounts are certified users who are designated as account administrators, and who are in charge of setting up and managing sub-account users, referred to as "sub-users." A multi-user account setup is preferred when an organization wants to centralize the administrative functions of several TAP users.

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. For more information on Multi-User accounts, please refer to the Getting Started Guide for Multi-Users.

Sub-user accounts are created and managed by multi-user account administrators. Sub-users cannot purchase tokens directly from MHS. Tokens must either be distributed or shared by their multi-user administrator.

Single-user accounts are stand-alone accounts that are not associated with a multi-user administrator. Single users manage their own accounts and can directly purchase report tokens via their TAP account. Most TAP users are set up as single-users.

Where can I find marketing materials for each product?

Marketing materials for each product on TAP are available by opening a product on the Home page, and then clicking Resources in the left menu. A page then appears with downloadable files of marketing material, sample reports, and brochures.

Where can I get additional help?

There are two categories of help available on the Talent Assessment Portal.

The first is top-level help that provides general information about the Portal and using the Talent Assessments. To access this help, click the Help Center link at the top of any page within the Talent Assessment Portal.

For product-specific help, select a Talent Assessment product on the Home page, and then click the Help link on the left menu.

Who Are We?

For over 35 years, MHS has provided trusted data-driven solutions across our core disciplines: Clinical, Education, Talent Development, and Public Safety. Within our Talent division, MHS helps to drive success in professional settings. We understand the elements of effective leadership and the requirements for an effective workplace. With our assessments, simulations, and their companion products, as well as our Organizational Development Solutions, we help clients identify opportunities for the development and cultivation of their employees.

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