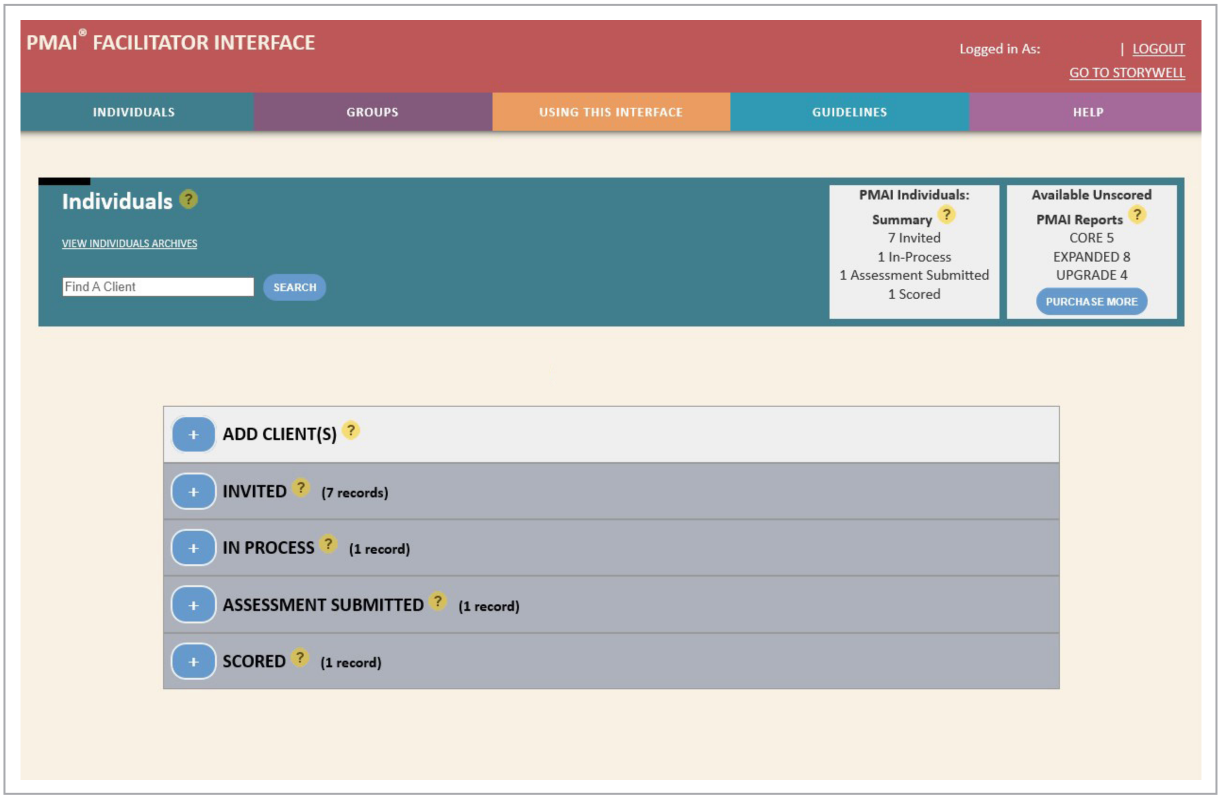
PMAI® Facilitator Interface - Help Section

Overview

The PMAI® Facilitator Interface is your complete management tool for administering the PMAI instrument, from start to finish.

Roll your mouse over the context-sensitive help icons ? throughout the interface for detailed help.

- **Individuals:** Use this section of the Interface to manage the PMAI experience for the individuals you work with.
- **Groups:** Use this section of the Interface to create and manage groups of people who will be taking the PMAI assessment.
- **Using this Interface:** An overview of how to use this interface to successfully administer the PMAI assessment to your clients.
- **Guidelines:** This page provides the all-important administrative and ethical guidelines to using the PMAI assessment, along with the terms and conditions for using the assessment and this interface.
- **Help:** This page!



Individuals

On this page you will manage all the individuals who are taking the PMAI assessment with you.

In the top section of the Individuals page you will see a link to view individuals that you have archived, and a search field to find a specific individual.

To the right you'll see a summary of the activity for all your individual clients, showing how many you have at each stage of the process. Next to that is your "inventory" of available Unscored PMAI Reports. You will need to have these in order to score your clients reports. Choose Purchase More to add Core, Expanded, or Upgrades to your account.

Add Client(s)

The first step in working with the PMAI assessment is to invite a client or student. Add the required First Name, Last Name, and email address. An optional deadline can be added, and that date is included in the invitation email to your client. Choose "Send Access to Report Upon Scoring" to have the system automatically send an email to the client when the PMAI assessment is scored. This can be a time saver for you because the email with a link to access the report will go to the client when you score the report. Use the Add Another button to invite more than one client.

You can import multiple clients by uploading a .csv file. Download and follow the Example File for the correct file formatting. Make sure the email addresses you add to the .csv file are formatted in the standard email address format – any addresses that are not properly formatted will interrupt the import process. When you are ready, click the Import Clients button and find your file. After the import, carefully inspect the imported client information before you invite your clients – make sure all the information is correct!

The "Clear Fields" button removes all entries in this section—use with caution!

Continue adding clients as needed, and when you are ready, choose "Invite New Clients." Important: the Interface will not store client information until you choose "Invite New Clients," so make sure you are ready to invite clients when you begin entering their information.

When you Invite New Clients, each person will get an email invitation with instructions to take the assessment.

You will track the progress of your clients and manage their experience within four sections beneath the Add Client section: INVITED, IN PROCESS, ASSESSMENT SUBMITTED, and SCORED.

Invited

This section displays the clients who have been invited but who have not yet started to take the PMAI assessment. Click the + sign to open this section.

Each row displays the information for the individuals you invited to take the assessment. For each person you can do the following, as shown in the columns:

CREATE BATCH, Select All: Select which client you would like to add to a Batch Process.

First Name, Last Name, Email: This is the information you entered when inviting the individual. In case you made an error, you can edit the email address. If the original email address was not correct, save the new email address by choosing the Save icon next to the edited email address. When you change the email address, the original invitation email will no longer work for accessing the PMAI assessment.

Important: When you change the email address you will need to resend the invitation email by choosing Send Reminder from the Action menu.

Deadline: This also is changeable, and this section will turn red if the deadline to take the assessment has passed.

Send Report Access to Client Upon Scoring: Check this box if you would like the client to get immediate access to their report when it is scored.

ACTIONS:

- **Send Reminder:** Use this to send the client a reminder to take the assessment.
- **View Email Log:** Choose this to see all the emails sent to this client from your Facilitator Interface.
- **Revoke Assessment:** Do this carefully! This will remove access to the assessment for this client.
- **Add to Group:** If you have created groups you may add this client to any of them. When you do that you will need to go to that group in the Groups page in order to manage the client.
- **Process Batch:** This button allows you to process any number of the clients with one click. First, select the clients you wish to process using the check boxes in each row. Then choose the Batch Process (to the right of the button) from the drop-down menu. Then click on the Process Batch button.

PROCESSES:

- **Send Reminders:** Send reminders to take the PMAI assessment to the chosen clients.
- **Revoke Assessments:** Remove access to the assessment for the chosen clients.
- **Add to Group:** Add all the chosen clients to a group, if you have created any groups.

In Process

Clients in this section have started but not completed the PMAI assessment. This may happen if they get distracted or simply close their browser window while taking it. The PMAI system saves their responses, and they can come back and pick up where they left off.

As in the INVITED section, each row displays the information for the individuals invited to take the assessment. Because they have already started to take the assessment, you cannot edit their name and email address.

First Name, Last Name, Email: This is the information you entered when inviting the individual.

Date Started: This is the date the client began to take the PMAI assessment.

Send Report Access to Client Upon Scoring: Check this box if you would like the client to get immediate access to their report when it is scored.

ACTIONS:

- **View Email Log:** Choose this to see all the emails sent to this client from your Facilitator Interface.
- **Demographic Info:** This displays information as entered by the client when they began to take the assessment.
- **PMAI Status:** Here you will see the date the client started the assessment, and how many items they have answered.
- **Add to Group:** If you have created groups you may add this client to any of them. When you do that you will need to go to that group in the Groups page in order to manage the client.

Assessment Submitted

Clients in this section have completed the PMAI assessment. These clients now need to have their answers scored, and you will do that here.

As in the previous sections, each row displays the information for the individuals who have taken the assessment. Because they have already completed the assessment, you have less ability to edit this information.

First Name, Last Name, Email: This is the information you entered when inviting the individual.

Date Submitted: This is the date the client completed the PMAI assessment.

Send Report Access to Client Upon Scoring: Check this box if you would like the client to get immediate access to their report when it is scored.

ACTIONS:

- **Score Core Report:** Choose this to create a PMAI Core Report for this client. Scoring will deduct from your Available Core PMAI Administrations. If you do not have any available, you will need to purchase more.
- **Score Expanded Report:** Choose this to create a PMAI Expanded Report for this client. Scoring will deduct from your Available Expanded PMAI Administrations. If you do not have any available, you will need to purchase more.
- **View Email Log:** Choose this to see all the emails sent to this client from your Facilitator Interface.
- **Demographic Info:** This displays information as entered by the client when they took the assessment.
- **Add to Group:** If you have created groups you may add this client to any of them. When you do that you will need to go to that group in the Groups tab in order to manage the client.

Scored

Clients in this section have either Core or Expanded PMAI Reports available.

As in the previous sections, each row displays the information for the individuals who have taken the assessment. Because these are all scored, you have less ability to edit this information.

For each person you can do the following, as shown in the columns:

CREATE BATCH, Select All: Select which client you would like to add to a Batch Process.

First Name, Last Name, Email: This is the information you entered when inviting the individual.

Date Scored: This is the date you scored the client's completed PMAI assessment and created their report.

Download or Upgrade Reports: Click on a report to download it. You can print this and hand it to your client or keep it for your records. Remember - these are confidential to you and your client.

Core Reports can be upgraded to Expanded Reports. Upgrading will deduct from your available Upgrade PMAI Administrations. If you do not have any available, you will need to purchase more. When a Core Report is upgraded, both the new Expanded and the original Core report are available to download.

ACTIONS:

- **Send Link to Report:** Select to give this client access to their report, either Core or Expanded, or in the case of an upgrade, both reports. The email sent to the client contains a link to a private page for them, which includes both web and PDF versions of the report, as well as descriptions of the 12 archetypes. The descriptions are either short for clients with a Core Report, or long for those with the Expanded Report.
- **Archive:** Use this to remove this client from the main Individuals view and send the record to the Individual Archives. This is provided as a convenience in case you only want to see clients you are actively helping. You can always "Un-Archive" the record to see it in the main Individuals view again.

- **View Email Log:** Choose this to see all the emails sent to this client from your Facilitator Interface.
- **Demographic Info:** This displays information as entered by the client when they took the assessment.
- **Add to Group:** If you have created groups you may add this client to any of them. When you do that you will need to go to that group in the Groups tab in order to manage the client.

Process Batch: This button allows you to process any number of the clients with one click. First, select the clients you wish to process using the check boxes in each row. Then choose the Batch Process (to the right of the button) from the drop-down menu. Then click on the Process Batch button.

PROCESSES:

- **Send Link to Report:** Select to give these clients access to their reports, either Core or Expanded, or in the case of an upgrade, both reports. The email sent to the clients contains a link to a private page for each of them, which includes both web and PDF versions of the report, as well as descriptions of the 12 archetypes. The descriptions are either short for clients with a Core Report, or long for those with the Expanded Report.
- **Archive:** Use this to remove the selected clients from the main Individuals view and send their records to the Individual Archives. This is provided as a convenience in case you only want to see clients you are actively helping. You can always "Un-Archive" the record to see it in the main Individuals view again.
- **Download Reports:** This process will download the selected clients' reports in one Zip file. The file name will include the date and time of the download.
- **Add to Group:** Add all the chosen clients to a group, if you have created any.

Groups

In this page you can work with your clients in as many groups as you like. Grouping clients here is for your convenience. You might be working with a classroom of students, or clients from a specific company or project, or on a weekly basis. In any case you can create a group to track them all in one place.

In the top section of the Groups page you will see a link to view groups that you have archived, and a search field to find a specific individual.

To the right you'll see a summary of the activity for all your individual clients, showing how many you have at each stage of the process, and a count of the total number of groups. Next to that is your "inventory" of available Unscored PMAI Reports. Choose Purchase More to add Core, Expanded, or Upgrades to your account.

Create a new group using the Add a New Group link at the top of the page. You can name the group and add your own description of that group.

All the rest of the functions and processes on this Group page are the same as the Individuals page. The difference is you will see them grouped together on the page, in the groups you created. All actions and batch processing apply to one group at a time.

Just like Individuals, groups can be archived so you can limit the number of groups displayed on this page. And you can "Un-Archive" them to put them back on the page. Choose View Group Archives at the top of the page to see the archived groups.

See the Individuals section of this Help document to explore all the functions available for the clients in your groups.