

Pearson Clinical Assessment **Q-global™ User Guide**

Setting up and Administering

Contents

Setting up and Administering Assessments.....	1
Enter New User	1
Enter New Examiner	3
Setting up a New Examinee	4
Assigning an Assessment.....	5
Generating Reports	8
Examinee Tab	8
The Reports Tab.....	11
Examinee Report.....	11
Group Report.....	12
Further Support	14

Setting up and Administering Assessments

Before you get started we recommend setting up your new Users and/or Examiner(s). So you need to identify who in your organisation is going to administer tests, manage your account and determine if examiners should be set up as users' which will give them a unique login ID and access to your account.

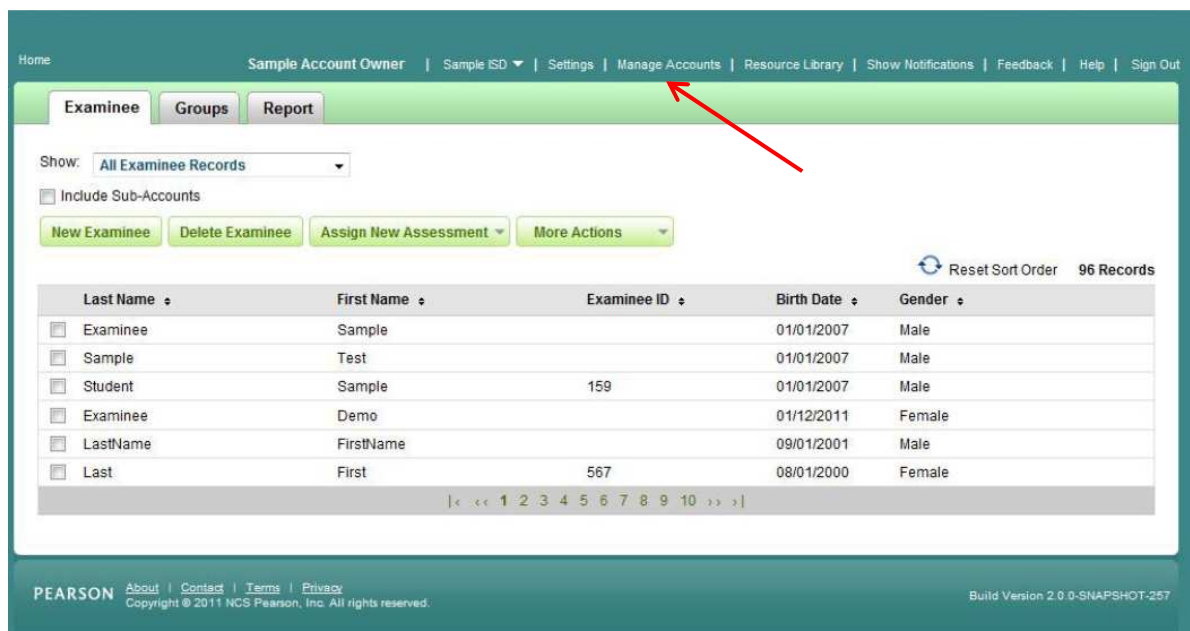
Enter New User

Users can have varying access to the Q-global platform based on the user role, which allows them to set up candidates, view results, run reports and administer assessments. Once you have identified your users we recommend creating a list with roles before setting them up in Q-global.

Example:

Name:	User Role:
Mary Smith	Account Administrator / Examiner
Sue Brown	Data Entry Operator

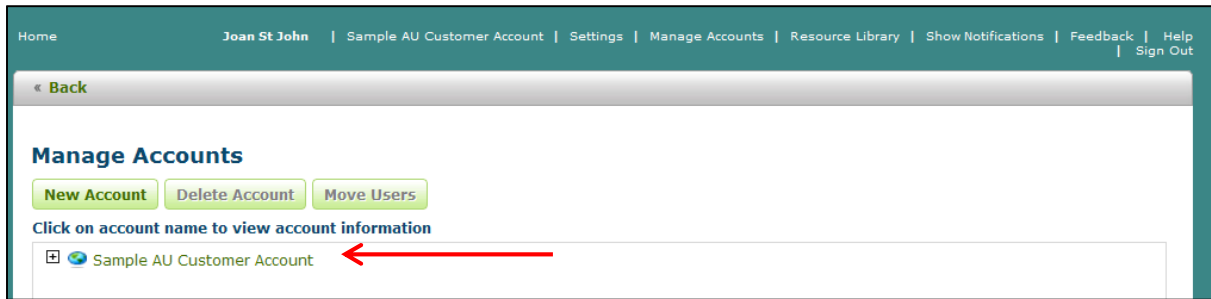
The first page you see once you log in to the system is the Examinee List. To add new users **click** on the 'Manage Accounts' link at the top of the page.



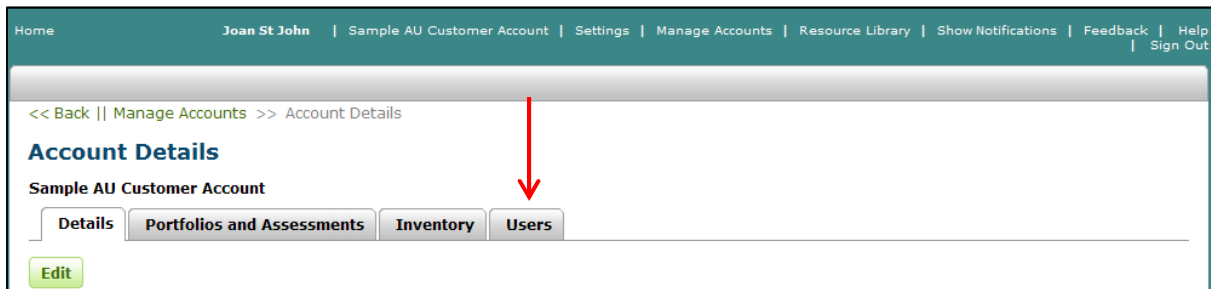
The screenshot shows the 'Examinee List' page in the Q-global system. The top navigation bar includes links for Home, Sample Account Owner, Sample ID, Settings, Manage Accounts (highlighted with a red arrow), Resource Library, Show Notifications, Feedback, Help, and Sign Out. Below the navigation bar, there are tabs for Examinee, Groups, and Report. The main content area displays a list of examinees with columns for Last Name, First Name, Examinee ID, Birth Date, and Gender. The list includes entries for 'Examinee', 'Sample', 'Student', 'Examinee', 'LastName', and 'Last'. A 'Show:' dropdown is set to 'All Examinee Records', and there are buttons for 'New Examinee', 'Delete Examinee', 'Assign New Assessment', and 'More Actions'. A 'Reset Sort Order' button and '96 Records' count are also visible. The footer contains the Pearson logo, contact information, and build version details.

Last Name	First Name	Examinee ID	Birth Date	Gender
Examinee	Sample		01/01/2007	Male
Sample	Test		01/01/2007	Male
Student	Sample	159	01/01/2007	Male
Examinee	Demo		01/12/2011	Female
LastName	FirstName		09/01/2001	Male
Last	First	567	08/01/2000	Female

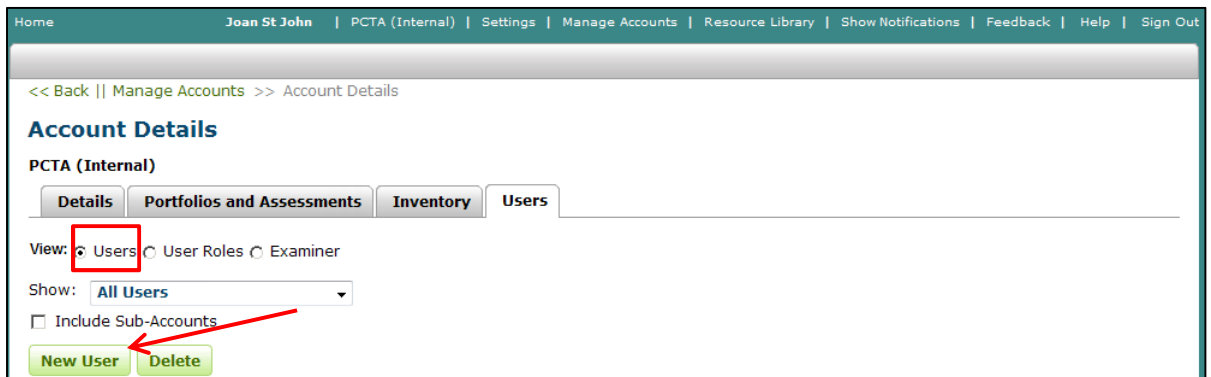
Click on the account name



Click on 'Users'



Select 'Users' then **click** the 'New User' button



The 'Create Account User' box will appear. **Enter** the User information; **click** on the 'Examiner' (Clicking 'Examiner' will add the user to the examiner list), **Select** 'Role' and/or create a new role then **click** 'Save'.

Create Account User

Save **Cancel**

*** Required**

Title:

* First Name:

Middle Name:

* Last Name:

Suffix:

* Email:

* Phone Number:

Status:

* Business Unit: **Australia**

* Account: **PCTA (Internal)**

Username:

* Qualification Level:

Examiner: ☐ **←**

* Role: **←**

Enter New Examiner

The system allows you to add names of the examiners that will not have access to the system. Adding the non-user examiner to the system will add his/her name to the Examiner list on the Assessment page and the Default Examiner list on the Settings page

To add a new Examiner follow the above steps except **select** 'Examiner' then **click** the 'New Examiner' button.

Home | Joan St John | Sample AU Customer Account | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

<< Back || Manage Accounts >> Account Details

Account Details

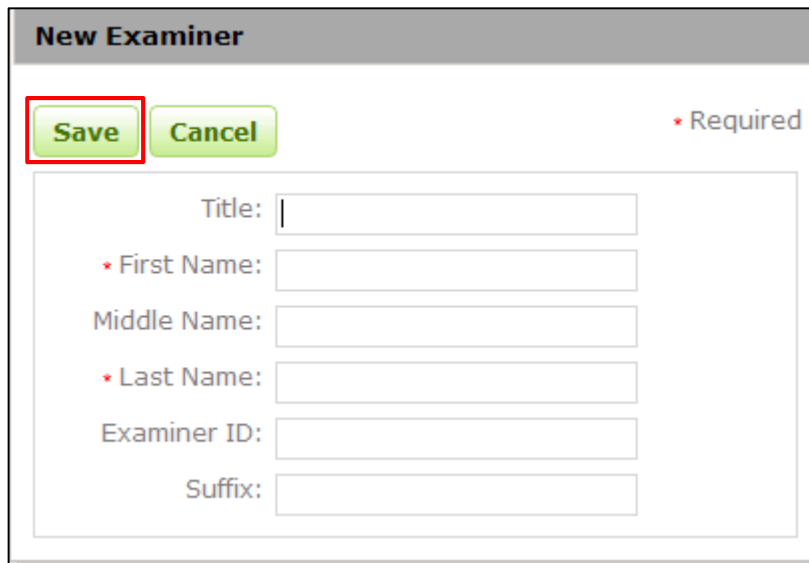
Sample AU Customer Account

Details | Portfolios and Assessments | Inventory | **Users**

View: ☐ Users ☐ User Roles ☒ Examiner **←**

New Examiner **Delete**

The 'New Examiner' box will appear. **Enter** the Examiner information and **click** the 'Save' button.



New Examiner

Save **Cancel** * Required

Title:

* First Name:

Middle Name:

* Last Name:

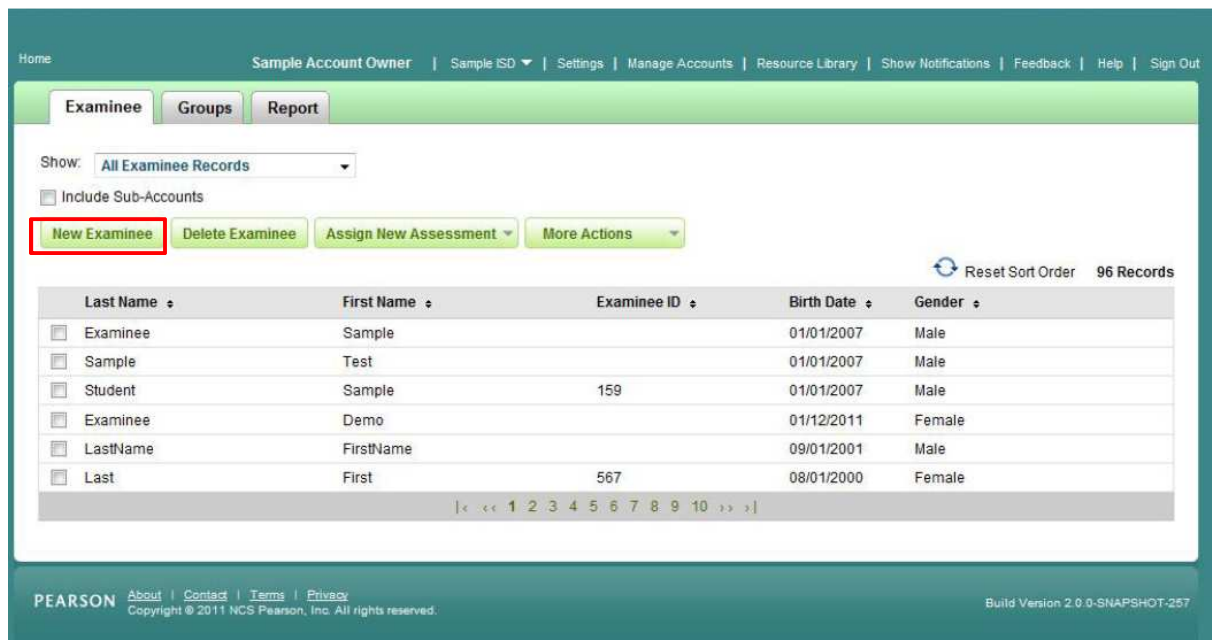
Examiner ID:

Suffix:

Setting up a New Examinee

Now that you have set up your examiners let's add your examinee's.

The first page you see once you log in to the system is the Examinee List. To add new examinees **click** on the 'New Examinee' tab.



Home Sample Account Owner | Sample ISD ▼ | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

Examinee Groups Report

Show: All Examinee Records ▼

☐ Include Sub-Accounts

New Examinee Delete Examinee Assign New Assessment ▼ More Actions ▼

Reset Sort Order 96 Records

Last Name	First Name	Examinee ID	Birth Date	Gender
<input type="checkbox"/> Examinee	Sample		01/01/2007	Male
<input type="checkbox"/> Sample	Test		01/01/2007	Male
<input type="checkbox"/> Student	Sample	159	01/01/2007	Male
<input type="checkbox"/> Examinee	Demo		01/12/2011	Female
<input type="checkbox"/> LastName	FirstName		09/01/2001	Male
<input type="checkbox"/> Last	First	567	08/01/2000	Female

|< << 1 2 3 4 5 6 7 8 9 10 >> >|

PEARSON About | Contact | Terms | Privacy
Copyright © 2011 NCS Pearson, Inc. All rights reserved. Build Version 2.0.0-SNAPSHOT-257

The 'New Examinee' box will appear. **Enter** the examinee information and **click** the '**Save**' button. The new examinee will appear in your list of examinee's on the front page.

« Back

New Examinee

Save **Cancel** • Required

First Name:

Middle Name:

Last Name:

Examinee ID:

Gender: Please Select...

• Birth Date: DD/MM/YYYY
Age: 0 years 0 months

Email:

Comment: 500 Characters remaining.

Account: **Sample AU Customer Account**

Custom Field 1:

Custom Field 2:

Custom Field 3:

Custom Field 4:

Note: You can also upload Examinee's in a group. For information please refer to the User Guide. Which can be found by clicking on the 'Resource Library' from the menu option at the top of the Q-global screen, select Resources > About Q-global > Q-global_User_Guide.pdf

Assigning an Assessment

To assign an assessment to an examinee **click** in the box next to the examinee name then **click** 'Assign New Assessment'

Home Sample Account Owner | Sample ID | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

Examinee Groups Report

Show: All Examinee Records

☐ Include Sub-Accounts

New Examinee **Delete Examinee** **Assign New Assessment** **More Actions**

Reset Sort Order 96 Records

Last Name	First Name	Examinee ID	Birth Date	Gender
<input checked="" type="checkbox"/> Examinee	Sample		01/01/2007	Male
<input type="checkbox"/> Sample	Test		01/01/2007	Male
<input type="checkbox"/> Student	Sample	159	01/01/2007	Male
<input type="checkbox"/> Examinee	Demo		01/12/2011	Female
<input type="checkbox"/> LastName	FirstName		09/01/2001	Male
<input type="checkbox"/> Last	First	567	08/01/2000	Female

PEARSON About | Contact | Terms | Privacy
Copyright © 2011 NCS Pearson, Inc. All rights reserved. Build Version 2.0.0-SNAPSHOT-257

From the list of available assessments **Click** the assessment you want to assign

Assign New Assessment ▾ More Actions ▾ Move To ▾ Search

Assessments

- AWMA-2
- D-REF Parent Form
- D-REF Self Form ←
- D-REF Teacher Form
- DIAL-4
- Speed Dial-4
- WRMT-III Form A
- WRMT-III Form B

The 'Assessment Details' screen will appear showing the *Examinee* and *Assessment* details.

Home | Joan St John | Sample AU Customer Account | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

← Back

Assessment Details: Sample Assessment

Save Save and Close Cancel Required

Examinee Details

First Name: Sample
Middle Name:
Last Name: Assessment
Examinee ID: 1259
Gender: Female
Birth Date: 13/10/1998
Age: 14 years 1 months
Email: sample.assessment@abc.c

Assessment Details

Assessment: D-REF Self Form
Status: Ready for Administration
Administration Date: 28/11/2012
Age at Administration: 14 years 1 months
Delivery: ☒ Manual Entry ☐ On Screen Administration
Examiner: [None] New Examiner

Save Save and Close Cancel

Demographics Item Entry Assessment Help

Referral Agent
Grade: Please Select...
School:

From the 'Assessment Details' section you have the following delivery type options:

- Manual Entry
- On-Screen Administration
- Remote On-Screen Administration

Assessment Details

Assessment: D-REF Self Form
 Status: Ready for Administration

Administration Date: 24/06/2014
 Age at Administration: 15 years 11 months

Examiner: [None] [New Examiner](#)

Delivery: ☒ Manual Entry
☐ On-Screen Administration (without Test Session Lock)
☐ Remote On-Screen Administration (without Test Session Lock)

Start Date: 24/06/2014
 Expiration Date: 24/07/2014

Recipient: An email invitation to complete the Remote On-Screen Administration of the assessment will be sent to the recipient specified below.
☒ Send the email invitation to the Examinee
☐ Send the email invitation to someone other than the Examinee (Rater)

First Name: Demo
 Last Name: Two
 Email:

[Save](#) [Save and Close](#) [Preview and Send Invitation](#) [Cancel](#)

If delivery option 'Remote On-Screen Administration' is selected **enter** the 'Recipient' information then **Click** 'Preview and Send Invitation'

The Invitation email page will open after selecting *Preview and Send Invitation* button. From the 'View Template' drop-down, **select** the appropriate invitation e-mail template.

Assessment Invitation Email

View Templates: All Templates
 Apply Template: Rater Invitation Email (rpr)

To Name: SampleParent
 To Email Address: sample.parent@email.com
 From Email Address: sample.examiner@email.com
 Subject: Invitation to Complete Questionnaire
 Copy Me: ☒

[Delete Template](#) [Save](#) [Save as New Template](#) [Send Invitation](#) [Cancel](#)

Dear {recipient_first_name},

You have been requested to complete one or more questionnaires (or rater forms) for {examinee_first_name} {examinee_last_name}.

To complete the form(s), click the following link:
 {rosa_production_url}

NOTE: In some cases, select email editors may alter the link above, causing it to display an incomplete ('active') link (i.e. part of the link is not underlined). Should you experience difficulties in accessing the form(s), ensure that the complete link text – including any part of it that is not underlined – is displaying in the browser window.

Follow the directions on the screen. If you have any questions, please contact your Assessment Administrator (DO NOT REPLY TO THIS EMAIL).

{user_first_name} {user_last_name}
 {user_phone}
 {user_email}

Generate

[Delete Template](#) [Save](#) [Save as New Template](#) [Send Invitation](#) [Cancel](#)

You can modify the template or click the 'Send Invitation' button to email the URL link to the On Screen Administrator.

Generating Reports

There are two options for generating reports.

1. The *Examinee* tab – allows the administrator to select the individual examinee and then generate the report
2. The *Report* tab – allows the administrator to search on individuals and or groups before generating reports. (please only use the Examinee tab way to generate a report at this time)

Examinee Tab

From the *Home* screen select the *Examinee* Tab.

Select the Examinee by double clicking on their name.

Examinee Groups Report					
<input type="checkbox"/> Include Sub-Accounts					
New Examinee Delete Examinee Assign New Assessment More Actions Move To <input type="text"/> Search					
View: ▼ Reset Sort Order 9 Records					
	Last Name	First Name	Examinee ID	Birth Date	Gender
1	<input type="checkbox"/> Mason	Mimma	1234	10/07/1995	Female
2	<input type="checkbox"/> St John	Joan	8765	24/09/1996	Female
3	<input type="checkbox"/> Assessment	Sample	1259	13/10/1998	Female
4	<input type="checkbox"/> Peros	Yvonne	1235	12/06/1995	Female
5	<input type="checkbox"/> Lukas	Nick	NL1234	11/04/1968	Male
6	<input type="checkbox"/> O\Keefe	Valorie	9875	04/08/1997	Female
7	<input type="checkbox"/> Mooney	Sabrina	6543	30/09/1996	Female
8	<input type="checkbox"/> Deery	Ben	9876	07/08/1995	Male
9	<input type="checkbox"/> Brown	Fiona	9874	12/08/1996	Female

This will open the Examinee profile screen where you can:

- view and edit the examinee demographics
- assign a new assessment
- un-assign an assessment
- delete an assessment
- generate a report
- view assessment / examinee status / administration date etc

« Back

Examinee: Joan St John

[Edit](#)

Demographics

System ID: 9532
 First Name: Joan
 Last Name: St John
 Birth Date: 24/09/1996
 Examinee ID: 8765
 Gender: Female
 Email: Joan.stjohn@pearson.com.au
 Comment:

Account: Sample AU Customer Account
 Custom Field 1:
 Custom Field 2:
 Custom Field 3:
 Custom Field 4:
 Groups:
 Legacy ID:

[Assign New Assessment](#) [Unassign Assessment\(s\)](#) [Delete Assessment\(s\)](#) [Generate Report](#)

Reset Sort Order 2 Records

	Assessment Name	Administration Date	Delivery	Status	Group Assessments
1	<input type="checkbox"/> D-REF Self Form	28/11/2012	Remote On Screen Administrat	Ready for Administration	
2	<input type="checkbox"/> D-REF Self Form	26/09/2012	Remote On Screen Administrat	In Progress	

Page 1 of 1 10 View 1 - 2 of 2

Select the assessment that you want to generate a report for by clicking on the box next to the assessment name, then select Generate Report.

The *Generate Report* screen will display the assessment that is ready for reporting.

[Generate Report](#)

Generate Report

[D-REF Individual Score Report](#)

Double click on the report you would like to generate.

The Report Configuration screen will display.

Report Configuration

[Generate Report](#) [Cancel](#)

Examinee: **Deery, Ben** Format: **Adobe (pdf)**
 Examinee ID: **9876**
 Assessment: **D-REF Self Form**
 Status: **Ready for Reporting** Records Selected: **1**
 Report: **D-REF Individual Score** Inventory Needed: **1 usage(s)**
 Available Inventory: **24 usage(s)** [Buy Now](#)

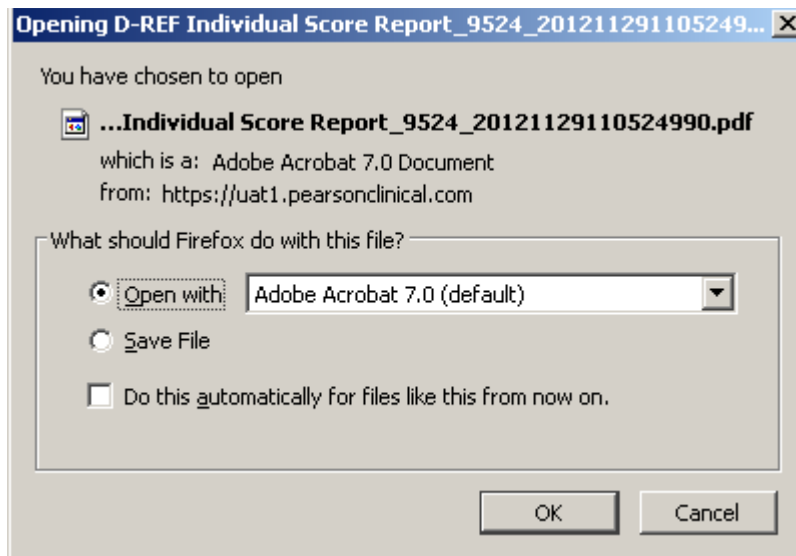
[Include](#) [Settings](#) [Assessment Help](#)

Use Respondent Name ☒
 Print Item Responses ☒

This screen displays:

- Examinee information
- Assessment
- Status
- Report - update and change from the drop down menu
- Format - note only PDF format available. This will be available in Word in future releases
- Inventory Needed – number of usage(s) required to generate the report
- Available Inventory – how many usage(s) available in your inventory
- Include – option to Use Respondent Name and print item responses
- Settings – **Select** Norm Group / Significance Level for Confidence Intervals / Significance level for Index Discrepancies
- Update options as required then **select** *Generate Report (top left)*.

A pop up window will display as follows allowing you to select to open the file or save the file to a nominated location.



The Reports Tab

This option allows you to generate reports for individuals and/or groups.

Examinee Report

To generate a report for an Examinee:

1. **Click** the *Report* tab.
2. **Select** a *Report* to generate.
3. **Select** a value from the *Show* field to choose all assessment records or only those records associated with a group assignment.
4. **Click** the check box to *Include Sub-Accounts* (if applicable) if you want to search for all examinee assessments you have privileges to see. (Optional)
5. **Complete** fields for any criteria you want used in the search. (Optional)
6. **Click** the *Search* button. (*Details on the search results table are listed described below.*)
7. **Click** the check box next to the assessment record you would like to generate a report for.
8. **Click** the *View Report* button.
9. This will open the *Report Configuration* page.

Report Configuration

[Generate Report](#) [Cancel](#)

Examinee: **Last Name, First Name**
 Examinee ID: **9875**
 Assessment: **Self**
 Report: **D-REF Individual Score Report**
 Format: **Adobe (pdf)**
 Records Selected: **1**
 Inventory Needed: **0 usage(s)**
 Available Inventory: **24 usage(s)** [Buy Now](#)

[Include](#) [Settings](#) [Assessment Help](#)

Select Norm Group ☒ Age Adjusted ☐ Age and Gender Adjusted
 Significance Level for Confidence Intervals ☒ 95% ☐ 90%
 Significance Level for Index Discrepancies ☒ .05 ☐ .15

The Report Configuration page is separated into two sections. The top section displays information about the examinee, the assessment selected, and the report.

The bottom section is where you select the information you would like included in the report. For details related to the tabs and fields displayed in this section refer to the Assessment Help specific to the report you are interested in or navigate to a product specific page and click the Assessment Help link (e.g. click Assessment Help from the D-Ref Configuration page).

10. When all of your selections have been made, **click** the *Generate Report* button.

Group Report

To generate a Group Report:

1. From the *Report* tab.
2. **Select** a group *Report* to generate.
3. **Select** a value from the *Show* field to choose all assessment records or only those records associated with a group assignment.
4. **Click** the check box to *Include Sub-Accounts* (if applicable) if you want to search for all examinee assessments you have privileges to see. (Optional)
5. **Complete** fields for any criteria you want used in the search. (Optional)
6. **Click** the Search button.
7. **Click** the check box next to the assessment records you would like to include in your report.

NOTE: You can select all records by clicking the check box in the header of the table.

8. **Click** the View Report button.
9. This will open the *Report Configuration* page.

The screenshot shows the 'Report Configuration' window. At the top, there are two buttons: 'Generate Report' (highlighted with a red arrow) and 'Cancel'. Below these are several fields: 'Examinee: Last Name, First Name', 'Examinee ID: 9875', 'Assessment: Self', 'Report: D-REF Individual Score Report', 'Format: Adobe (pdf)' (with a dropdown arrow), 'Records Selected: 1', 'Inventory Needed: 0 usage(s)', and 'Available Inventory: 24 usage(s)' with a 'Buy Now' link. There are two tabs: 'Include' and 'Settings' (which is active). The 'Settings' tab contains three sections: 'Select Norm Group' with radio buttons for 'Age Adjusted' (selected) and 'Age and Gender Adjusted'; 'Significance Level for Confidence Intervals' with radio buttons for '95%' (selected) and '90%'; and 'Significance Level for Index Discrepancies' with radio buttons for '.05' (selected) and '.15'. An 'Assessment Help' link is located to the right of the 'Settings' tab.

For details related to the tabs and fields displayed in this section refer to the Assessment Help specific to the report you are interested in or navigate to a product specific page and click the Assessment Help link (e.g. click Assessment Help from the D-Ref™ Report Configuration page).

10. When all of your selections have been made, click the Generate Report button.

Rules

- If you select more than one examinee to run the same report on (batch report), the following information on the top of the window will not be shown, Examinee, Examinee ID, Assessment, and Report.
- If you select more than one assessment for the same examinee (multi-rater reports), a validation will occur on the selected assessments allowing or disallowing the Generate Report button.
- Only assessments with a status of 'Ready for Reporting' or 'Report Generated' can be used in a report.
- Assessment records without a valid reporting status will be returned with the search results; however, you cannot select them for report generation.
- Assessments with a status of 'Ready for Reporting' require a report-specific usage or subscription in your inventory. If you do not have usages or an active subscription available, you can click the **Buy Now** link to purchase more.

Further Support

If you need further assistance please contact our client services team on 1800 882 385(AUS) or 0800 643 660 (New Zealand)