

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

Setting up and Administering

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## 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.

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

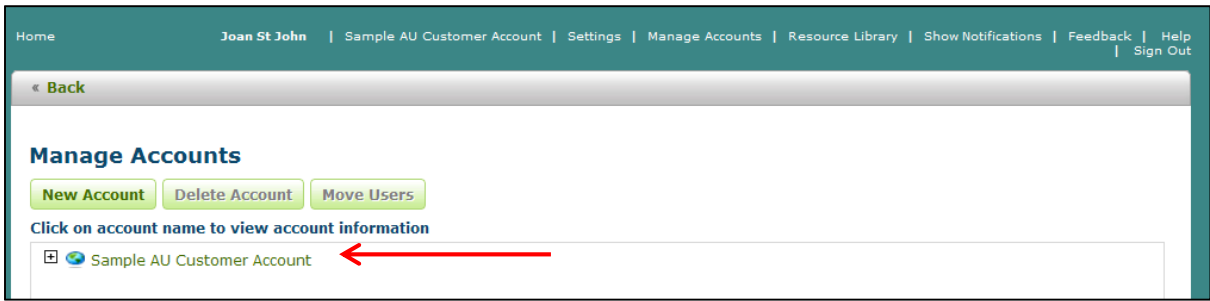
New Examinee | Delete Examinee | Assign New Assessment | More Actions

Reset Sort Order 96 Records

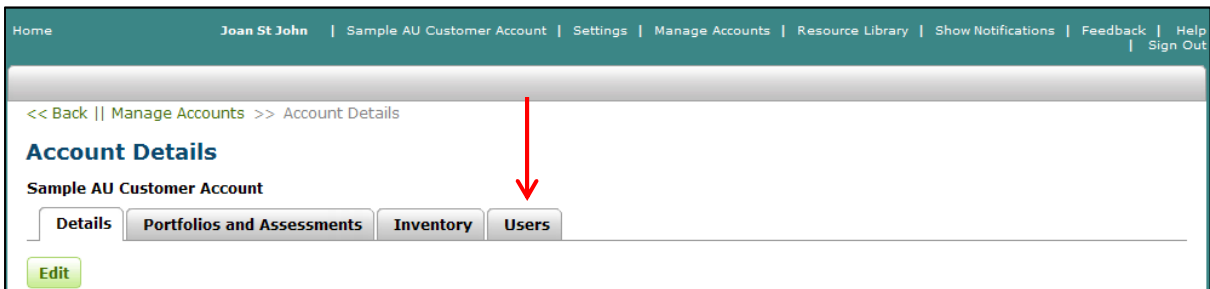
Last Name	First Name	Examinee ID	Birth Date	Gender
<input type="checkbox"/> Examinee	Sample		01/01/2007	Male
<input type="checkbox"/> Sample	Test		01/01/2007	Male
<input type="checkbox"/> Student	Sample	159	01/01/2007	Male
<input type="checkbox"/> Examinee	Demo		01/12/2011	Female
<input type="checkbox"/>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

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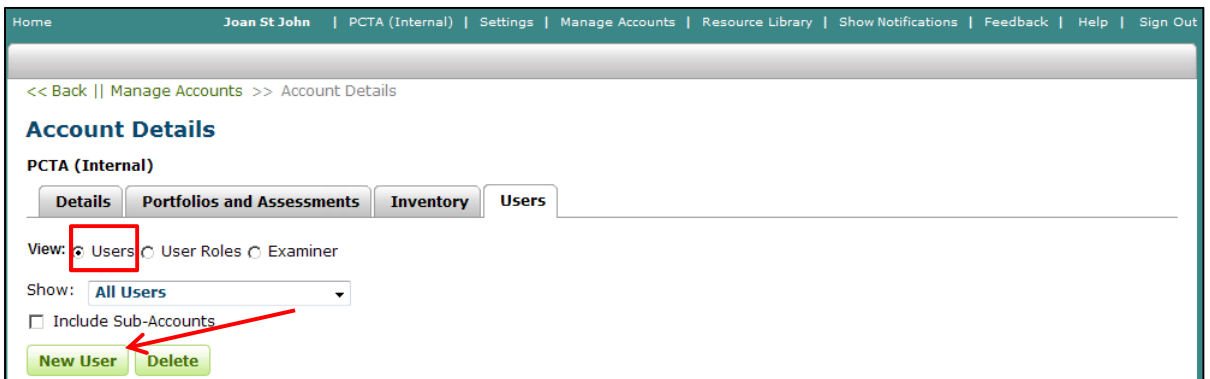
**Click** on the account name



**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 >> >|

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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:

\* Birth Date:

Email:

Comment:

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 ISD | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

Examinee Groups Report

Show:

Include Sub-Accounts

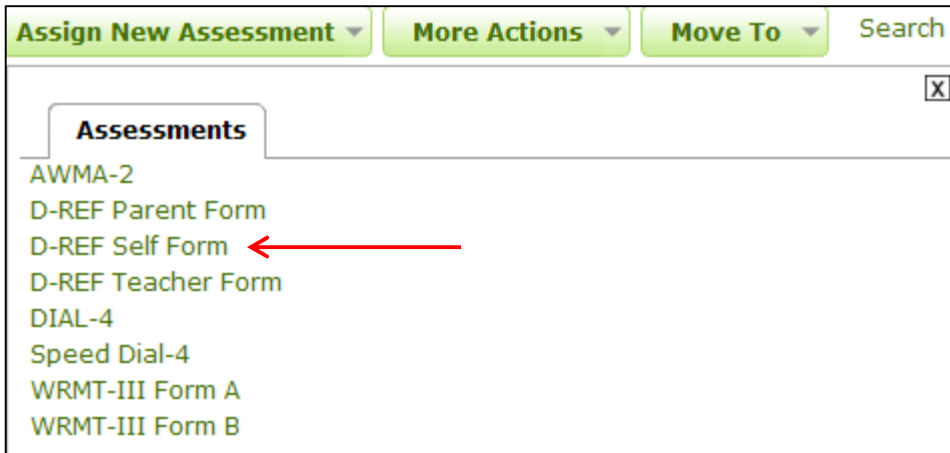
**New Examinee** **Delete Examinee** **Assign New Assessment** **More Actions**

Reset Sort Order 96 Records

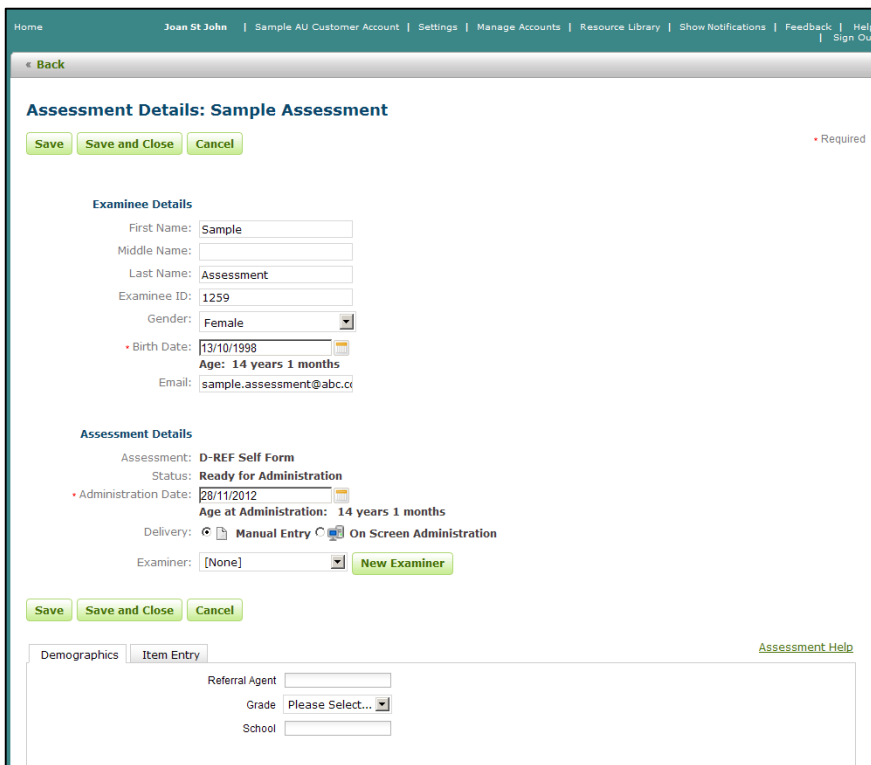
Last Name	First Name	Examinee ID	Birth Date	Gender
<input type="checkbox"/> Examinee	Sample		01/01/2007	Male
<input type="checkbox"/> Sample	Test		01/01/2007	Male
<input type="checkbox"/> Student	Sample	159	01/01/2007	Male
<input type="checkbox"/> Examinee	Demo		01/12/2011	Female
<input type="checkbox"/>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

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



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





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 (rtr)

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}

Dismiss

[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.

The screenshot shows the 'Examinee' tab interface. At the top, there are three tabs: 'Examinee' (selected), 'Groups', and 'Report'. Below the tabs, there is a search bar and several action buttons: 'New Examinee', 'Delete Examinee', 'Assign New Assessment', 'More Actions', and 'Move To'. A 'View:' dropdown is set to '10', and there are 'Reset Sort Order' and '9 Records' indicators. The main area contains a table with the following data:

	<input type="checkbox"/>	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

**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

<input type="checkbox"/>	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	

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](#)

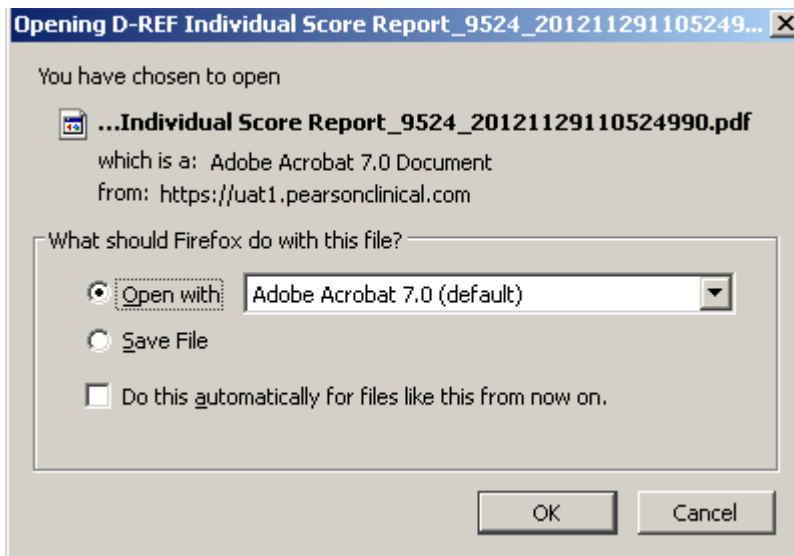
Use Respondent Name

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.

The screenshot shows the 'Report' configuration page. At the top, there are three tabs: 'Examinee', 'Groups', and 'Report' (which is highlighted with a red box). Below the tabs, the 'Report' dropdown is set to 'D-REF Individual Score'. Under 'Assessment Name', three checkboxes are checked: 'D-REF Self Form', 'D-REF Parent Form', and 'D-REF Teacher Form'. The 'Show' dropdown is set to 'All Assessment Records', and the 'Include Sub-Accounts' checkbox is unchecked. The search filters include: Administration Date (Is equal to, DD/MM/YYYY), Assessment Status (Is equal to), Legacy System (Is equal to), First Name (Starts with), Middle Name (Starts with), Last Name (Starts with), Examiner First Name (Starts with), Examiner Last Name (Starts with), Custom Field 1 (Starts with), Custom Field 2 (Starts with), Custom Field 3 (Starts with), Custom Field 4 (Starts with), Examinee ID (Starts with), Legacy ID (Starts with), Gender (Is equal to), and Birth Date (Is equal to, DD/MM/YYYY). At the bottom, there are 'Search' and 'View Report' buttons. Below the buttons is a table header with columns: Last Name, First Name, Examinee ID, Birth Date, Assessment, Admin Date, Status, Modified, Group, and Account.

## 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.

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.

**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

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)