

QUICK START GUIDE - Emailing Assessments

This guide assumes that you have logged on to your console and have clicked on Users and Assessments. If you don't know your login information, contact us at EIOne@effectivenessinstitute.com or 425-641-7620

NOTE: If you have clicked on the "Email Assessment" button after assigning Assessments, skip to the next section, "Send the Email."

SELECT YOUR USERS

1 Find the users you want to email. If you're administering a Teams That Work, you'll want to select the correct assessment under the TTW Pre/Post Filter (Pre in Initial, Post is follow-up Assessment)

2 Make sure the box is checked next to each name (you can check the box next to "First Name" to select everyone)

3 Click on **Email Assessments**

<input type="checkbox"/>	Name	Last Name	Email
<input checked="" type="checkbox"/>	Sample	User 1	Sample1@test.com
<input checked="" type="checkbox"/>	Sample	User 2	Sample2@test.com
<input checked="" type="checkbox"/>	Sample	User 3	Sample3@test.com
<input checked="" type="checkbox"/>	Sample	User 4	Sample4@test.com
<input type="checkbox"/>	Sample	User 1	Sample1@test.com
<input type="checkbox"/>	Sample	User 2	Sample2@test.com

SEND THE EMAIL

4 Select the type of Assessment that you will be sending to the users.

5 Choose Invitation or Reminder (Reminder doesn't go to people who have completed the Assessment).

6 For Teams That Work and Teams That Work Plus+. Choose Pre (initial) or Post (follow-up) Assessment.

7 You can choose to edit the standard template. Be sure to Save As Template.

8 This will be what you have entered in the Client Details Tab.

9 Don't touch this!!!

4 Assessment Type: Behavior Style Self

6 Pre/Post Assessment: Select Pre or Post...

5 Email Type: All

7 Template: Behavior Style Self Invit

Schedule for Delivery **10** Date: 1/15/2015

Remind Every Days(s) until complete

Expires on: 1/15/2015

Delete Template Save as Template

11 From: eionline@effectivenessinstitute.com

Send To: 1 recipients

Cancel Subject: Behavior Style Self Assessment Invitation

8 You have been invited to complete a Behavior Style Self assessment. To complete your assessment, click on the link below or copy and paste the link into your internet browser (do not share this link - it is unique to you). Questions or technical assistance? Please contact your administrator at {Client_Phone} or {Client_Email}.

9 (Passcode_Link)

10 You can schedule your emails and reminders to go out on a later date.

11 Click Send (even for invitations and reminders scheduled for later).