CareersFastTrack

The Career Management System ™

Private Consultants User Manual

Help Desk
+61 3 8844 9444
info@careersfasttrack.com.au

CareerLifeCollege

CareersFastTrack

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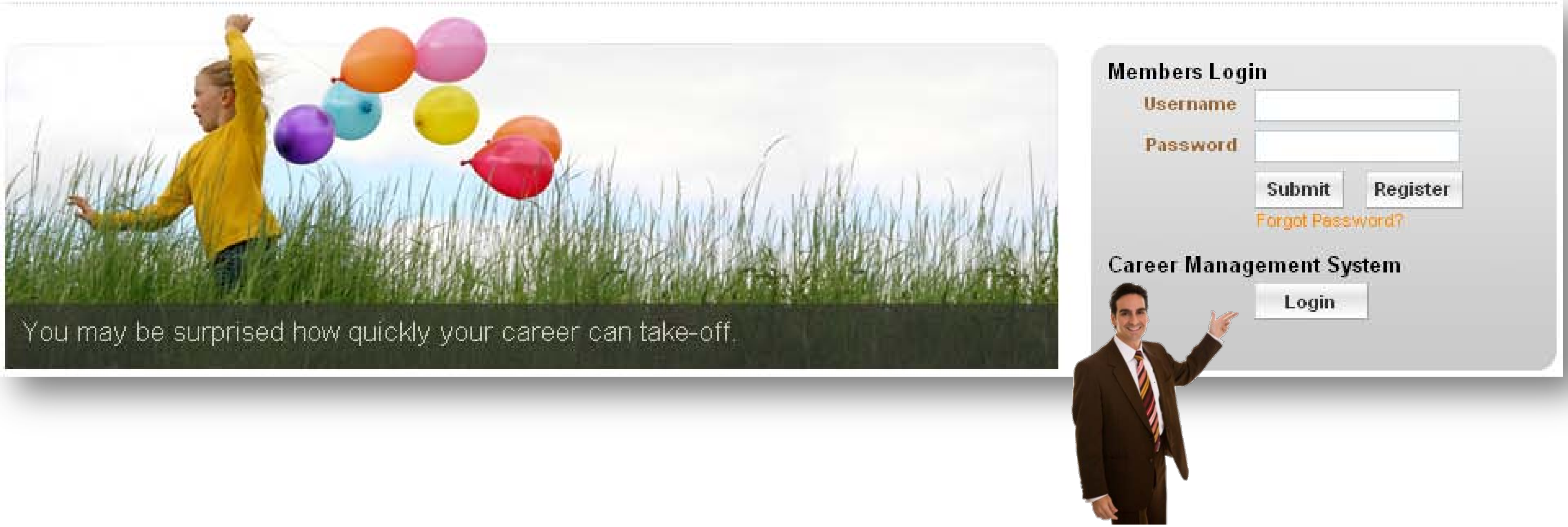
1. How to log into CMS?

Step 1: Go to www.careersfasttrack.com.au

Step 2: Click on **Login** to enter "Career Management System".



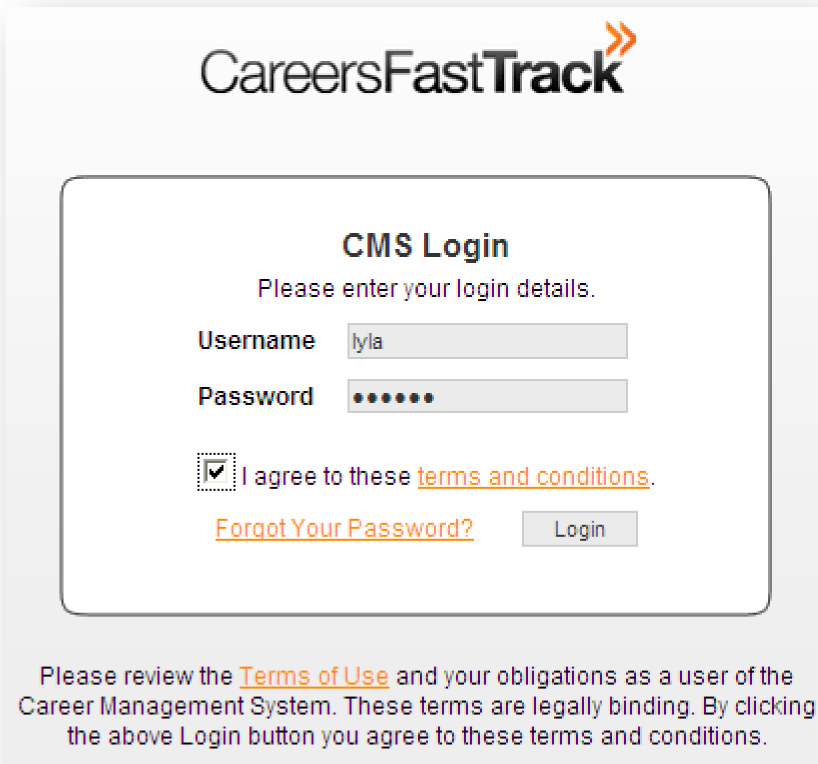
Cont’d

Step 3:

☑ Enter your username and password

☑ check the Box “**Agree to Terms of Use”**.

☑ Click **Login**.



2. Consultant's Home Page

Your name appears here

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User: lyla

Home | Schools | Clients | Profile | Support | Logout

Careers Fast Track - Career Management System

Welcome Lyla Khan

Date Accredited: 20/07/2009

This Career Management System has been developed to provide you with a cost effective and integrated career-life counselling toolset and methodology to enable you to more easily assist your clients to 'find their contribution niche' across their life-span.

You are using this system because you have successfully completed accredited training with Careers Fast Track. We ask that you keep your skills current and engage in continued professional development consistent with national guidelines.

Note: Please review the Terms of Use and your obligations as a user of the Career Management System. These terms are legally binding.

Latest Promotions

Refer a Colleague

Gain 10 school credits or 5 client credits for referring a colleague who completes the workshop. Click Here

Latest Information

PD on the Roof - Learnability

Stage 1 Update
Stage 1 Ppt presentation download here.

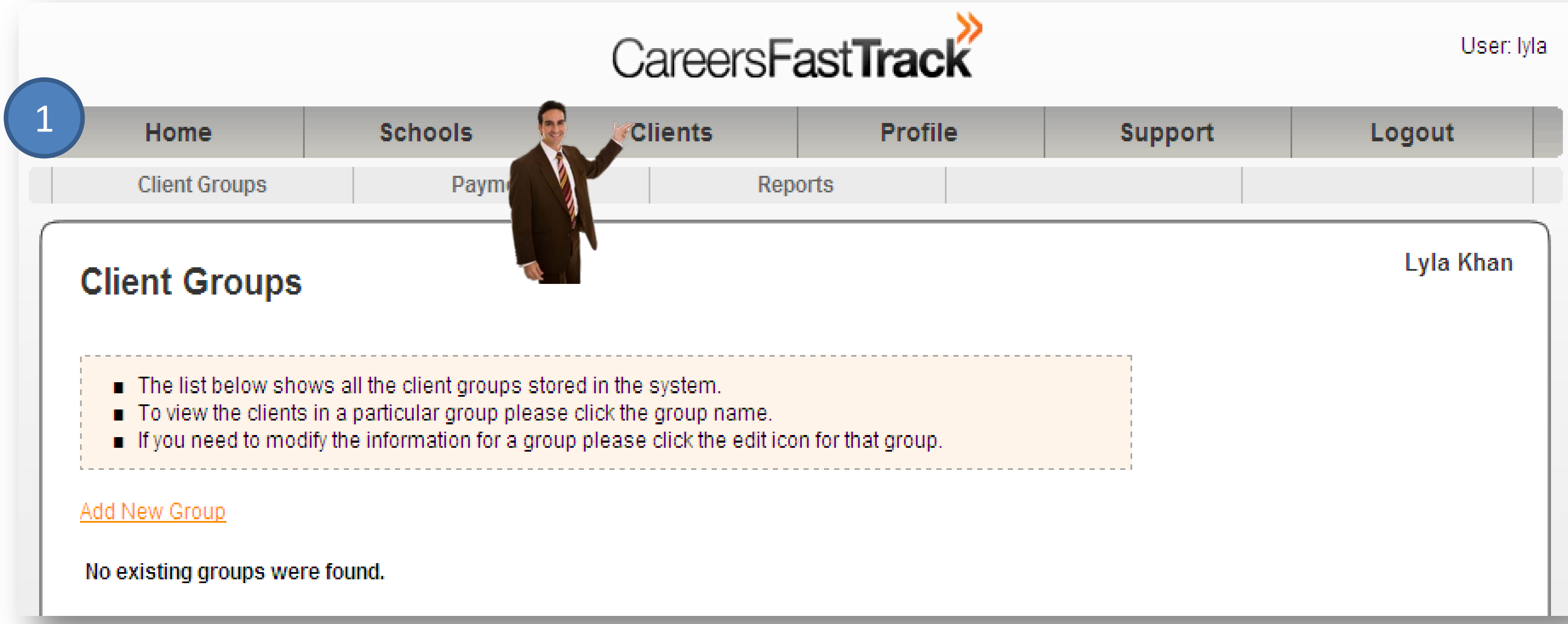
Stage 2 Update
Stage 2 Ppt presentation download here.

Update
Hope you like the new look and feel to your CMS. If you have any

Home | Forums | Enquiry Form | Contact Us | Privacy Policy | Terms & Conditions |

3. How to Create a Group?

Step 1: Click on **Clients** in the top toolbar as shown in the picture 1.



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User: lyla

Home | Schools | Clients | Profile | Support | Logout

Client Groups | Payments | Reports

2

Client Groups

Lyla Khan

- The list below shows all the client groups stored in the system.
- To view the clients in a particular group please click the group name.
- If you need to modify the information for a group please click the edit icon for that group.

Add New Group

No existing groups were found.

Step 2: To create a Group, click on "Add New Group" as shown in picture 2.

3

Update Client Group

Lyla Khan

To create a new client group please complete th

Step 3:Enter New Group Information and click **Add**. Please note, **Group Name** and **Client Type** are mandatory fields. Please see picture 3.

Group Details

Group Name *	Dynamics
Client Type *	Adults
Comments	Engineers based in NSW

Add | Cancel

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Cont’d

- ☑ Lyla has created her first Group, “**Dynamics”**.
- ☑ Now she can add members to her new group.

4

Client Groups

Lyla Khan

- The list below shows all the client groups stored in the system.
- To view the clients in a particular group please click the group name.
- If you need to modify the information for a group please click the edit icon for that group.

Add New Group

Group Name	Client Type		
Dynamics	Adults		

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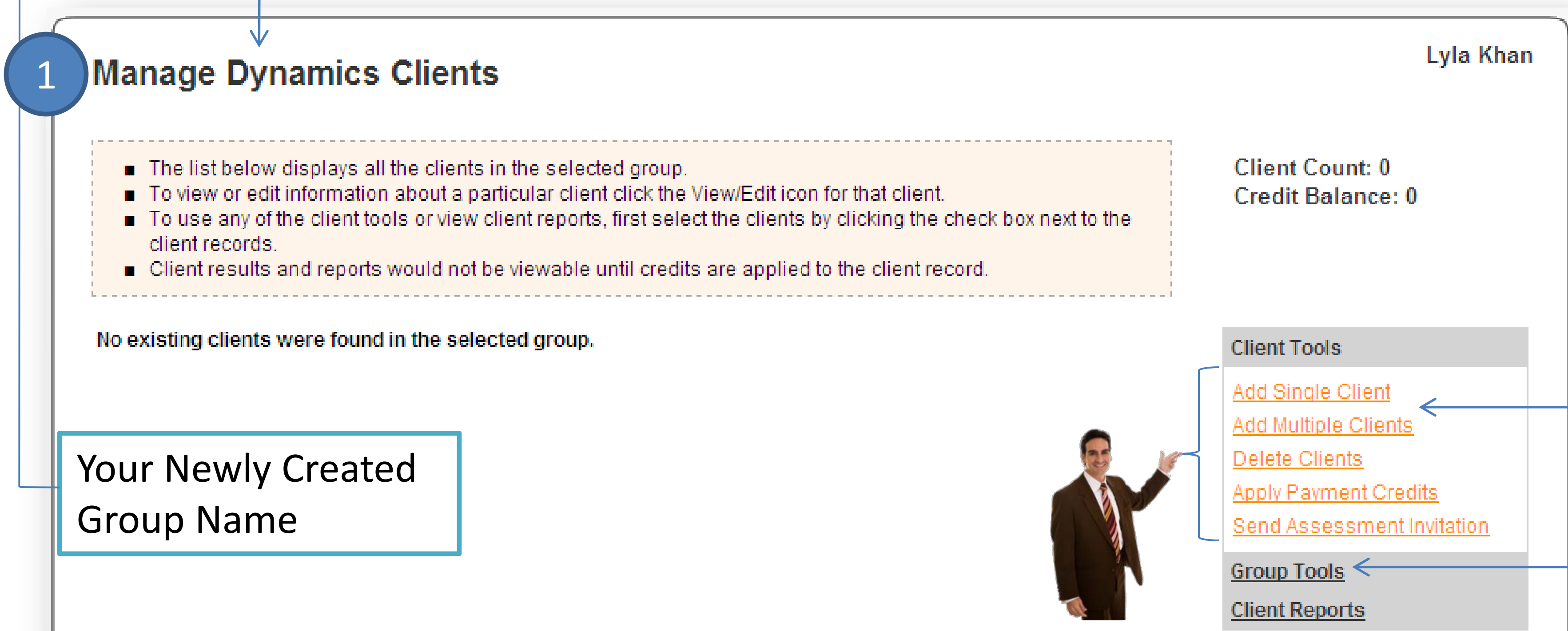
4. How to add client(s) to a group?

There are **Three** ways to add clients to a Group.

1. Add Single Client
2. Add Multiple Clients and
3. Group Registration Link (in the **Group Tools** Link)



Your Newly Created Group Name

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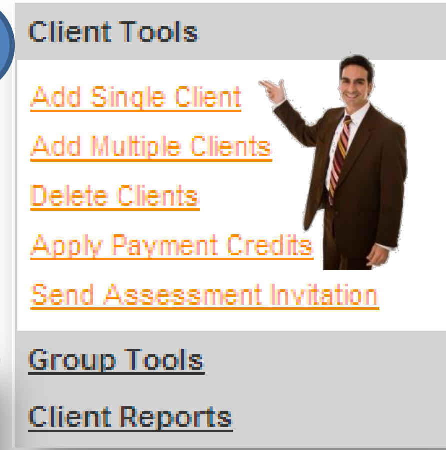
1. Add a Single Client

Step 1: Click on “Add Single client”.

Step 2: Add single **Client Details** as shown in the following picture.

Step 3: Click **Add**.

2



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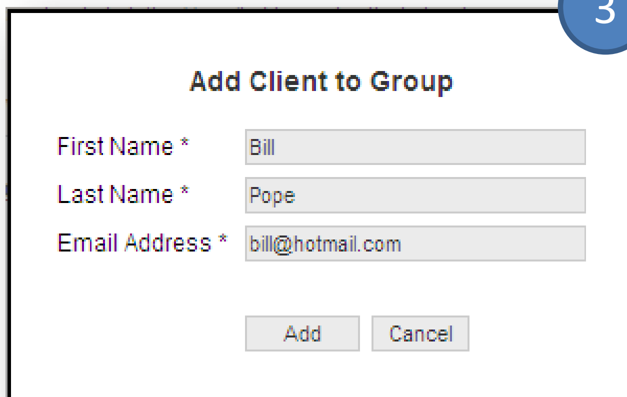
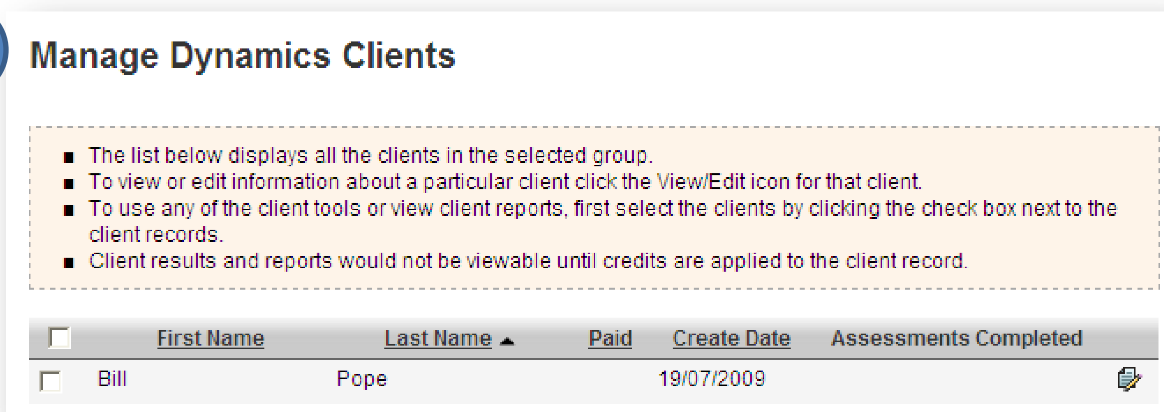


☑ Bill Pope has become the first client of Lyla’s group called **Dynamics**.

4



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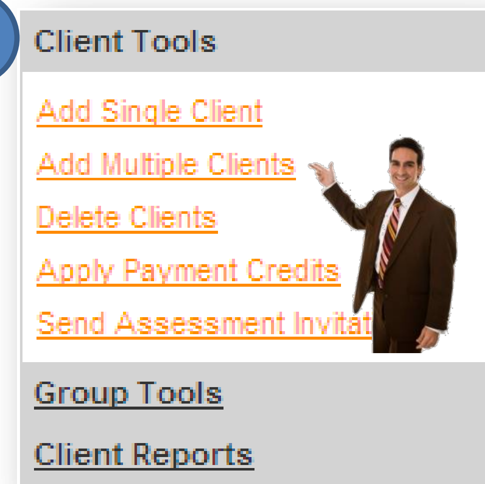
2. Add Multiple Clients

Step 1: Click on “**Add Multiple Clients**”.

Step 2: Add **Client Details** as shown in picture 2.

Step 3: Click on “Client Groups” in the top toolbar menu to display your active Groups. To view your new clients, click on the target Group (Dynamics).

1



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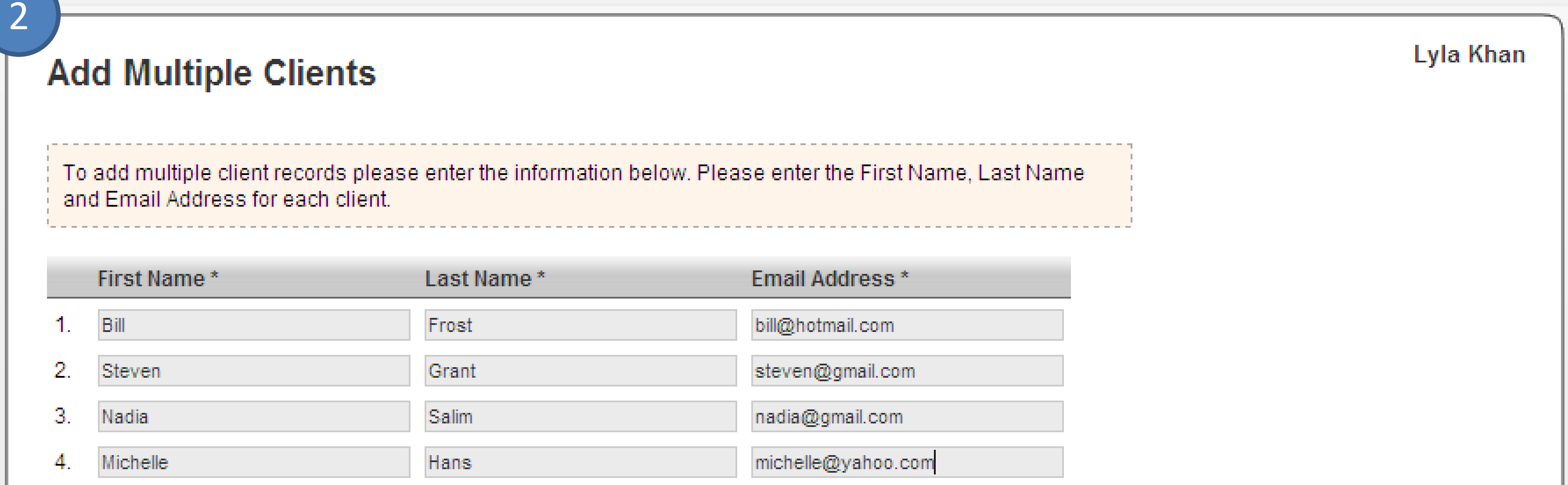


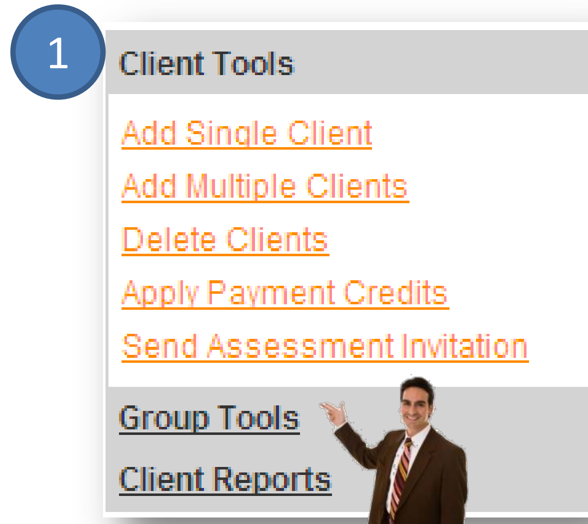
3. Group Link Registration

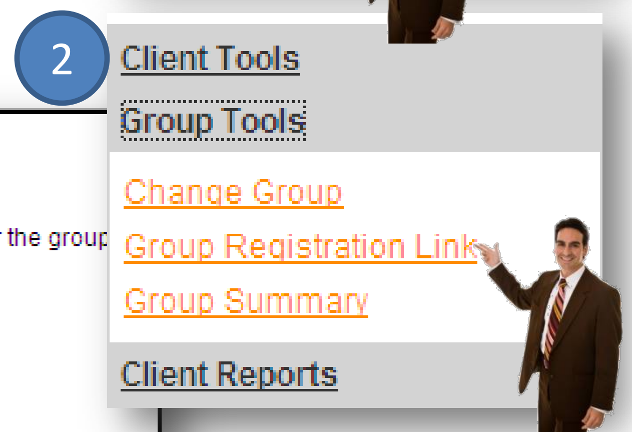
Step 1: Click on **Group Tools**.

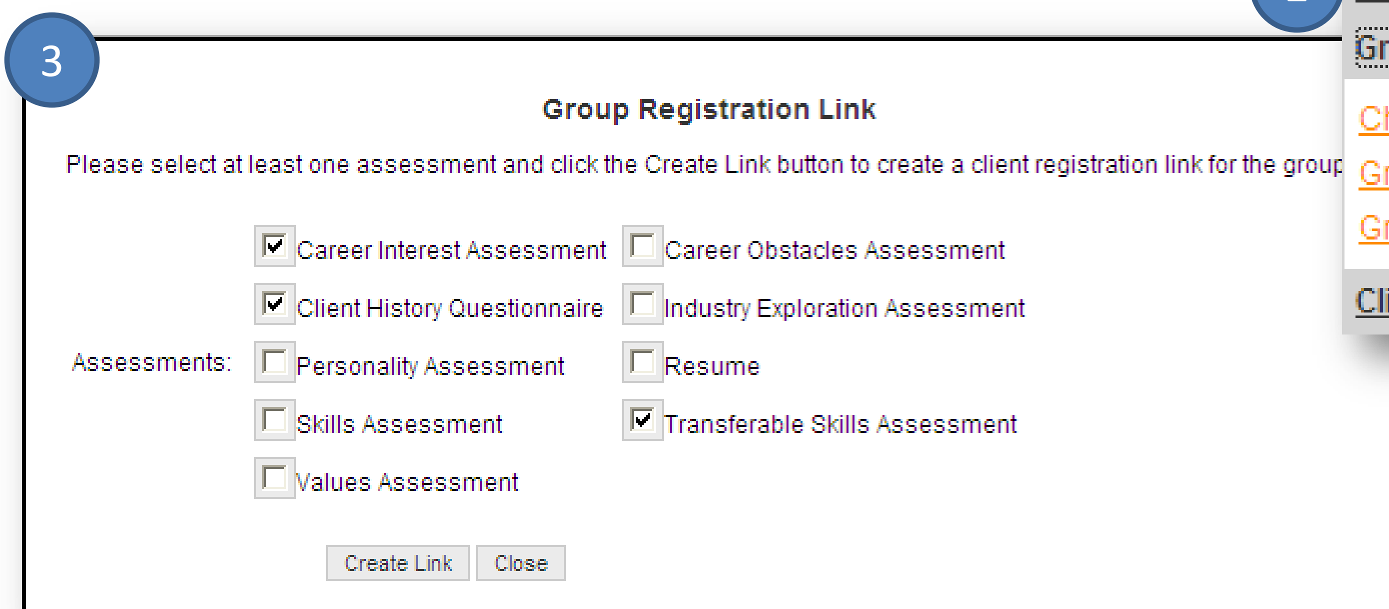
Step 2: Click on **Group Registration Link**.

Step 3: Check Assessments that you wish your clients to complete. See picture 3 as an example.

Step 4: Click - **Create Link**.







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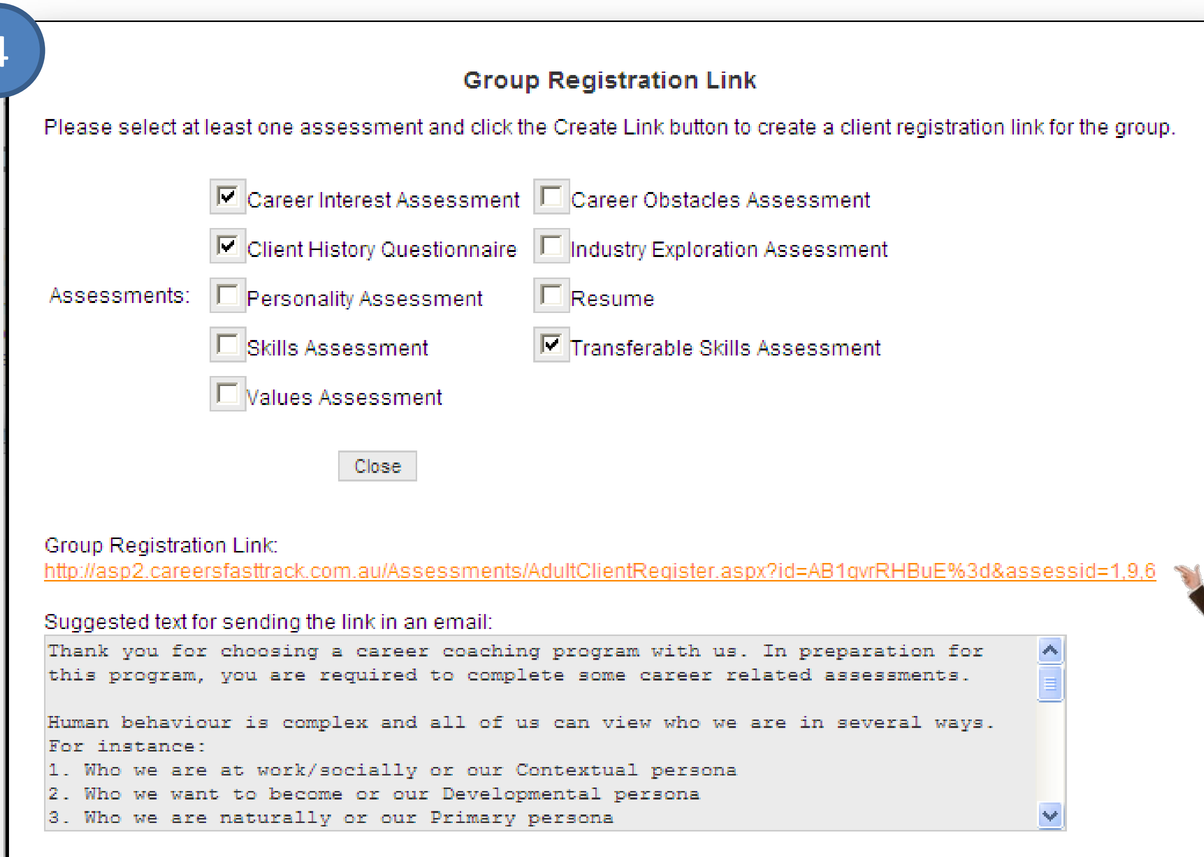
Step 5: Send the **Group Registration Link** to your clients. It can be done through one of the following steps:

1. via Group Email, or
2. Post link on your website, or
3. Cut and Paste the link onto your e-learning platform.

4



Group Registration Link

Please select at least one assessment and click the Create Link button to create a client registration link for the group.

Assessments:

- [x] Career Interest Assessment
- [ ] Career Obstacles Assessment
- [x] Client History Questionnaire
- [ ] Industry Exploration Assessment
- [ ] Personality Assessment
- [ ] Resume
- [ ] Skills Assessment
- [x] Transferable Skills Assessment
- [ ] Values Assessment

Close

Group Registration Link:
http://asp2.careersfasttrack.com.au/Assessments/AdultClientRegister.aspx?id=AB1qvrRHBuE%3d&assessid=1,9,6

Suggested text for sending the link in an email:

Thank you for choosing a career coaching program with us. In preparation for this program, you are required to complete some career related assessments.

Human behaviour is complex and all of us can view who we are in several ways. For instance:
1. Who we are at work/socially or our Contextual persona
2. Who we want to become or our Developmental persona
3. Who we are naturally or our Primary persona

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Quick Tip

1. Please avoid manually writing the **Group Registration Link (GRL)** for your clients. Chances of making a mistake in copying the link with large number of characters is very high.

Step 6: The **Group Registration Link** will open the **Registration Form** for clients to complete. It is important that clients complete each of the required sections in the form.

Please see sample **Registration Form** on next page as picture 5.

5

Career Program Registration Form

Please complete the following form to register for your career program.

Make sure you use your correct email address as we will be sending you information in the future that could help you get your dream job.

If you need assistance please contact your career consultant or send an email to info@careersfasttrack.com.au

First Name *	Prince
Last Name *	Jack
Home Phone	03 8888 9999
Work Phone	
Mobile	0400 2222 2222
Email Address *	prince@yahoo.com

Submit

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Step 7: After successful registration, clients will immediately be able to complete the selected Assessments. When registered, the client will have access to the Assessments in a new screen (see picture 6).

6

Career Assessments

Welcome Prince Jack. Please complete the following career-life assessments as part of your program with Interface Fix.
Remember - there is no right or wrong answer. The answer that fits you best is right for you.
The key is to identify the real you rather than who you'd like to be or what others tell you.

Instructions

- Each assessment needs to be completed in one sitting - do not log out or you will need to begin from the start.
- When each of the following links is ticked you have completed this activity.

1. Career Interest Assessment

1. Transferable Skills Assessment

1. Client History Questionnaire

If you have any questions, please contact

Consultant Name:	Lyla Khan
Organisation:	Interface Fix
Phone:	03 8844 9444
Mobile:	0400 223322
Email Address:	info@careerlifecollege.com.au

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Quick Tip

1. Clients must read instructions at the top of each Assessment. As a counsellor you should clarify these instructions to clients as appropriate.

General Instructions

- After successful registration, Clients are sent an automatic message confirming their registration. This email also contains a link to the Career Assessments page for future reference.
- As each Career Assessment is completed - a **Tick** will appear next to the completed Assessments.

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5.How to send Assessment invitation to clients?

Step 1: Access your **Group**.

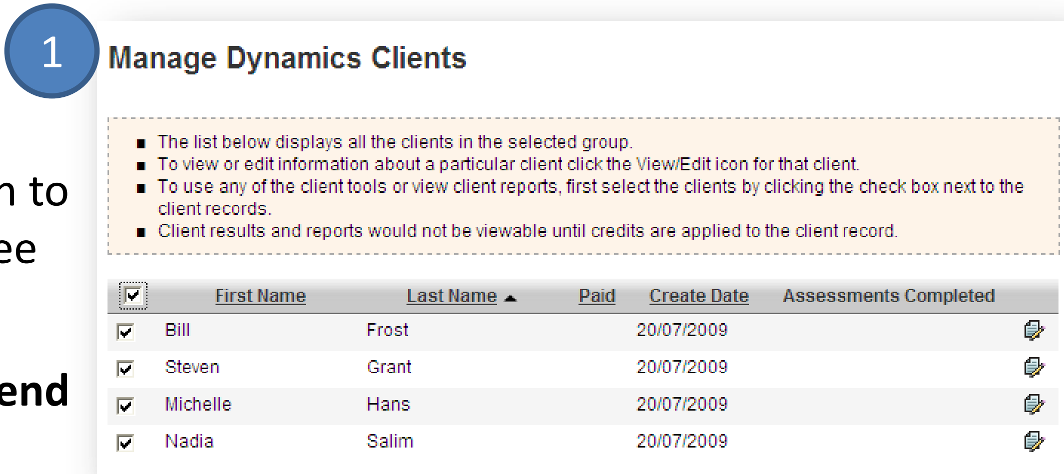
Step 2: Select the client/clients you wish to send Assessment invitation to. Please see picture 1.

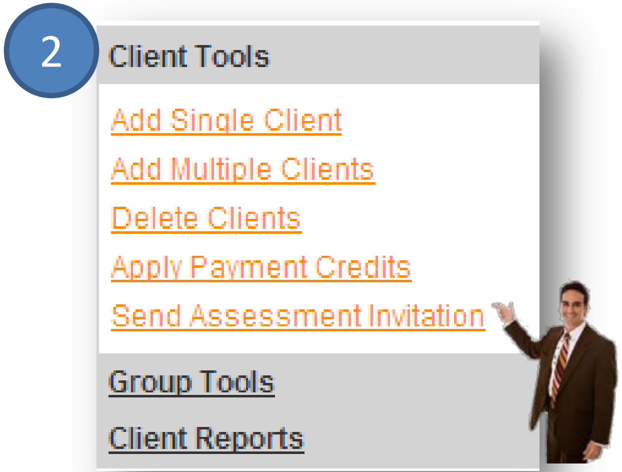
Step 3: Go to **client Tools** and click on **Send Assessment Invitation**.

Step 4: Select the Assessments by checking the relevant boxes. Please see picture 3 on the following page.

Step 5: Review and amend the message if needed.

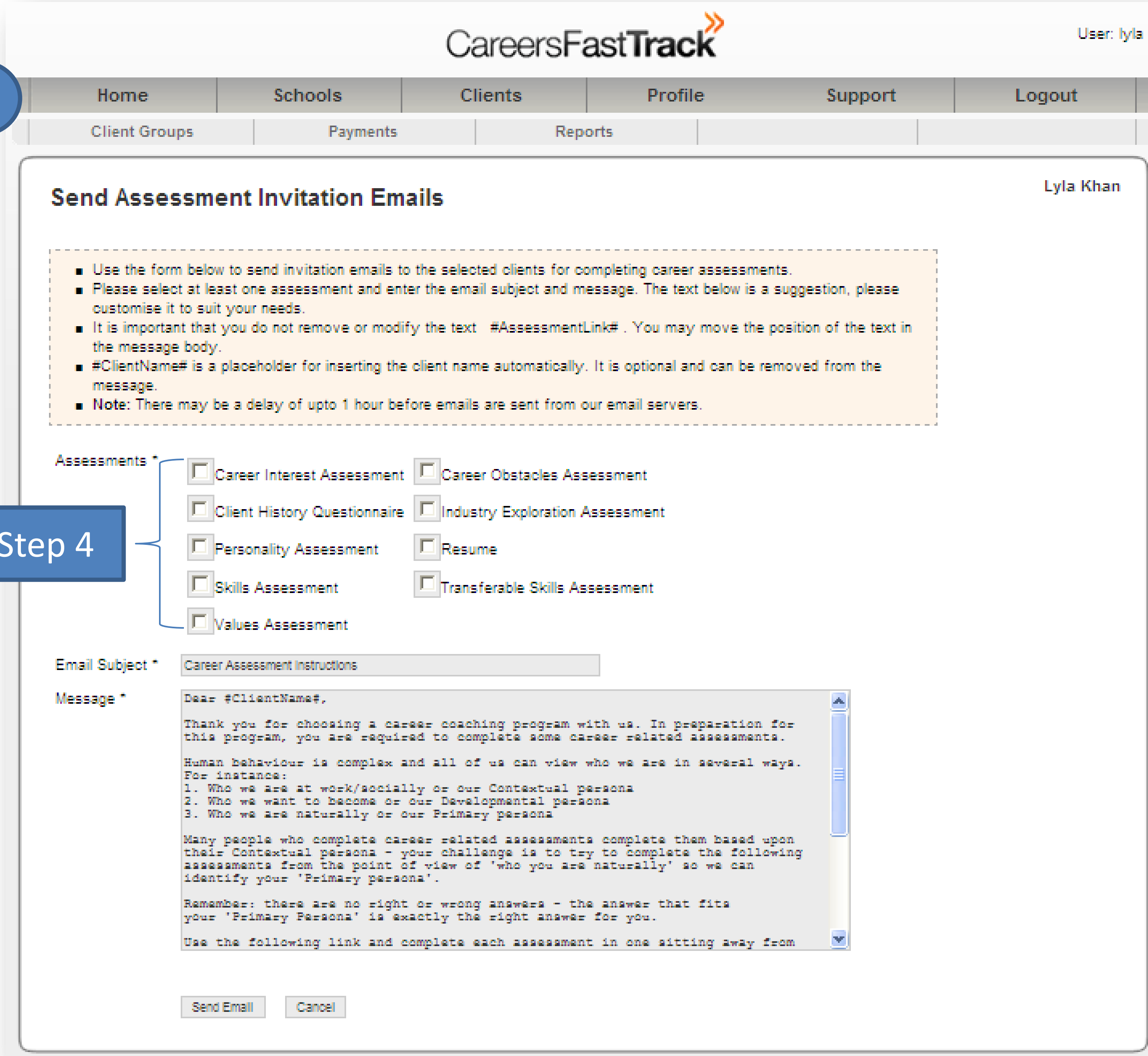
Step 6: Click **Send Email**.





3

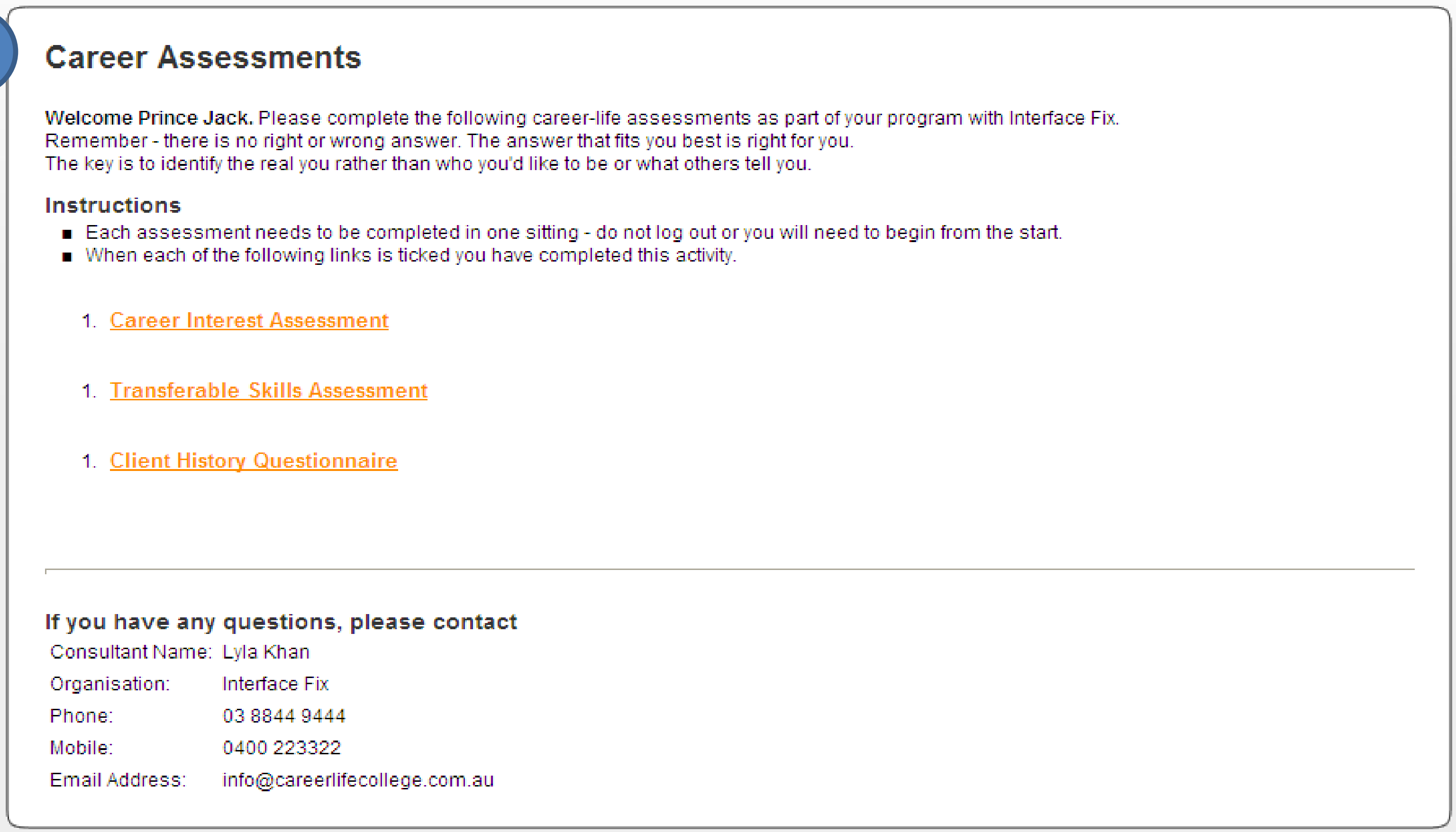
Step 4


CareersFastTrack
User: lyla
Home
Schools
Clients
Profile
Support
Logout
Client Groups
Payments
Reports
Lyla Khan
Send Assessment Invitation Emails
Use the form below to send invitation emails to the selected clients for completing career assessments.
Please select at least one assessment and enter the email subject and message. The text below is a suggestion, please customise it to suit your needs.
It is important that you do not remove or modify the text #AssessmentLink# . You may move the position of the text in the message body.
#ClientName# is a placeholder for inserting the client name automatically. It is optional and can be removed from the message.
Note: There may be a delay of upto 1 hour before emails are sent from our email servers.
Assessments *
Career Interest Assessment
Career Obstacles Assessment
Client History Questionnaire
Industry Exploration Assessment
Personality Assessment
Resume
Skills Assessment
Transferable Skills Assessment
Values Assessment
Email Subject *
Career Assessment Instructions
Message *
Dear #ClientName#,
Thank you for choosing a career coaching program with us. In preparation for this program, you are required to complete some career related assessments.
Human behaviour is complex and all of us can view who we are in several ways. For instance:
1. Who we are at work/socially or our Contextual persona
2. Who we want to become or our Developmental persona
3. Who we are naturally or our Primary persona
Many people who complete career related assessments complete them based upon their Contextual persona - your challenge is to try to complete the following assessments from the point of view of 'who you are naturally' so we can identify your 'Primary persona'.
Remember: there are no right or wrong answers - the answer that fits your 'Primary Persona' is exactly the right answer for you.
Use the following link and complete each assessment in one sitting away from
Send Email
Cancel

Quick Tip

1. Assessment invitations are sent from noreply@careersfasttrack.com.au by default. Please ensure your clients are aware of this email address.
2. Clients can access incomplete Assessments by following the Assessment Link in the original email sent to them. It is advised that clients do not delete this email.

4


Career Assessments

Welcome Prince Jack. Please complete the following career-life assessments as part of your program with Interface Fix.
Remember - there is no right or wrong answer. The answer that fits you best is right for you.
The key is to identify the real you rather than who you'd like to be or what others tell you.

Instructions

- Each assessment needs to be completed in one sitting - do not log out or you will need to begin from the start.
- When each of the following links is ticked you have completed this activity.

1. Career Interest Assessment

1. Transferable Skills Assessment

1. Client History Questionnaire

If you have any questions, please contact

Consultant Name:	Lyla Khan
Organisation:	Interface Fix
Phone:	03 8844 9444
Mobile:	0400 223322
Email Address:	info@careerlifecollege.com.au

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6. How to access Client Reports?

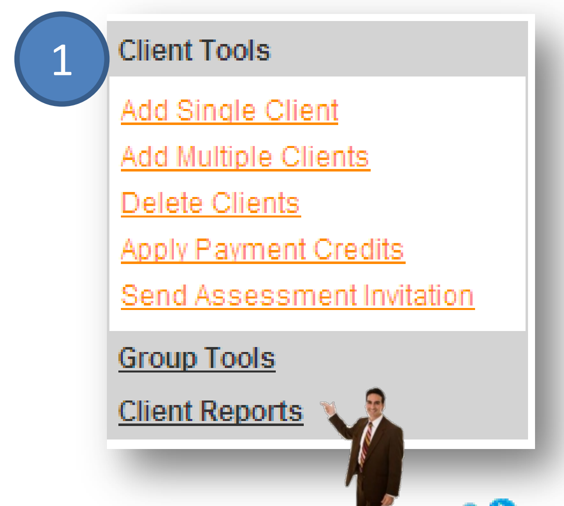
Quick Tip

1. To view/print client reports, you would need to purchase and apply credit to each client. A credit can be applied individually to a client or to multiple clients in a group. Go to **How to Apply Credits** to learn more about how to apply credits.
2. Please go to **How to Purchase Credits** for detailed instructions on how to purchase credits.

Step 1: Go to Clients Group. In the example, we have used Lyla's group, "Dynamics".

Step 2: Select the client by checking the box on left side of their name. See picture 3 on the next page.

Step 3: Click on client Reports as shown in picture 1.



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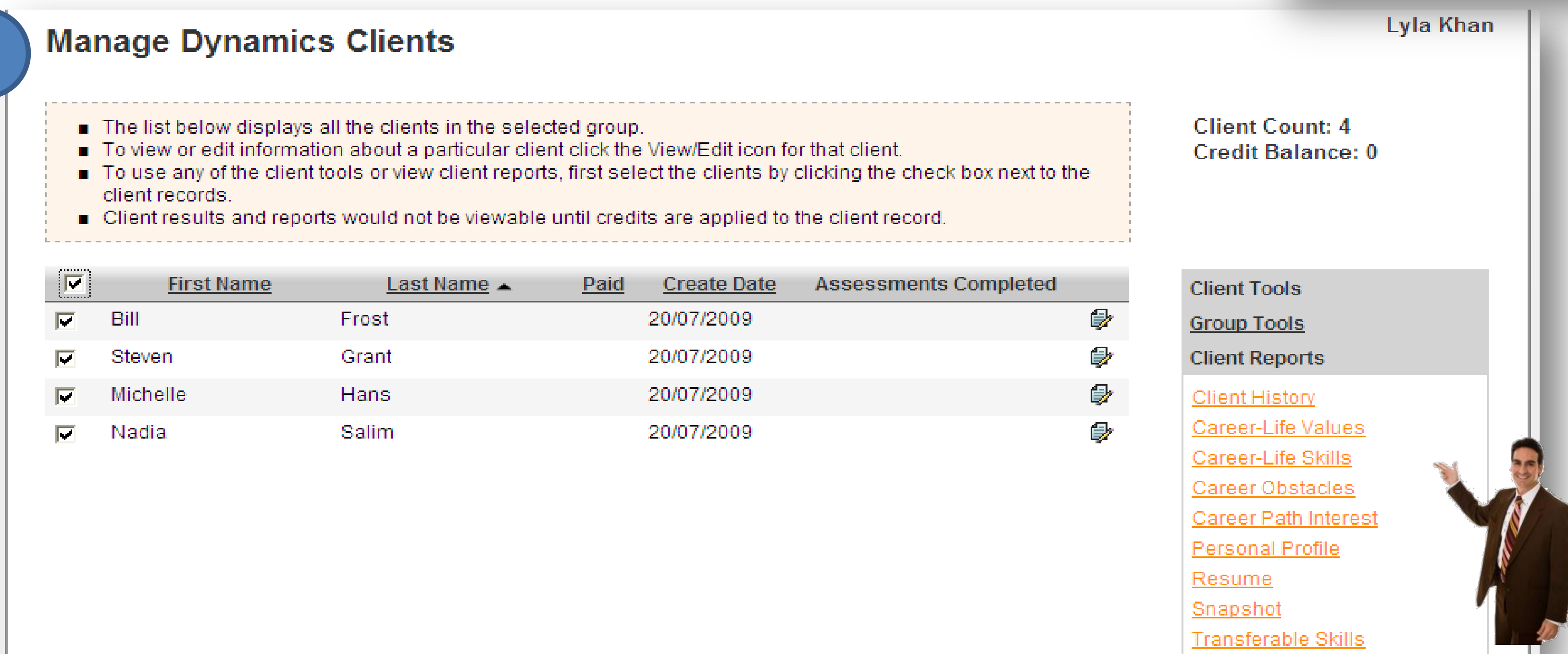
2

Step 4: Click on the report title that you wish to display. The download process may take few minutes.

Step 5: Once displayed, reports can be printed from **File** menu in the tool bar. These reports can also be converted into PDF using PDF writer.

3



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General Instructions

- To print clients reports (or PDF them), select (tick) 20 clients at a time. This is due to limited on-board printer memory which may result in an incomplete print job.

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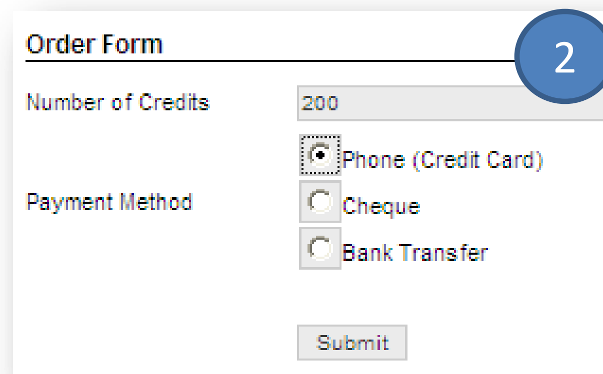
7. How to Purchase Credits?

Step 1: Select your consulting business name.

Step 2: Go to **Purchase Credits** under **Payments** in the second toolbar.

Step 3: Fill in the **Order Form** for the amount of credits and select the method of payment.

Step 4: Select **Submit**.



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8. How to Apply a Credit?

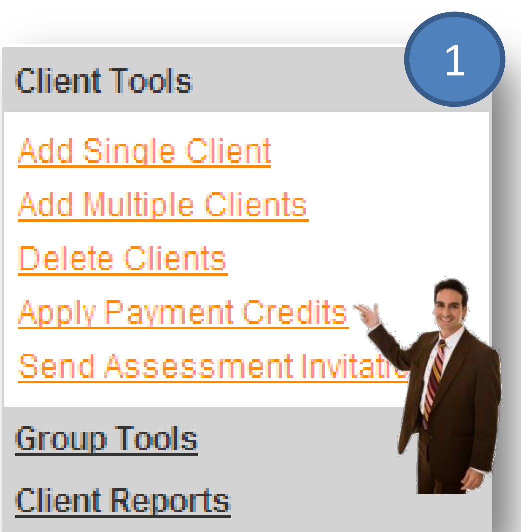
Step 1: Go to the target Group.

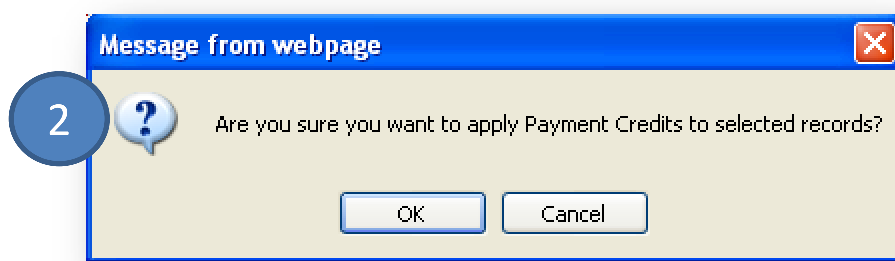
Step 2: Select the client to whom you wish to apply credit by checking the box next to his/her name.

Step 3: Under Client Tools, click **Apply Credit Payments**.

Step 4: Click OK on prompt. Once the credit is applied, a letter “**Y**” will appear next to the selected student. Please see picture 3.

Note – YOU CANNOT apply a credit to the same client more than once.





9. Updating Information in CMS

9.1 Updating Client Information
9.2 Updating Group Information
9.3 Changing a Client from One Group to Another
9.4 Updating Consultant Information
9.5 Change Password

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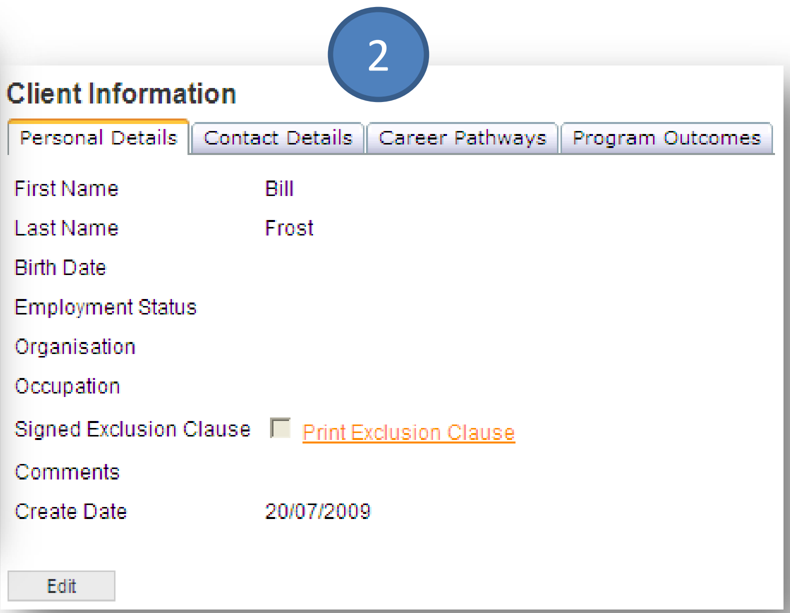
9.1 Updating Client Information

Step 1: Open the Client group.

Step 2: Click on the corresponding 'paper & pencil' icon in the far right column. Please see in picture 1.

Step 3: To change any record under "**Client Information**" click on **Edit**.

Step 4: After Editing, Click **Update** to record changes.



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9.2 Updating Group Information

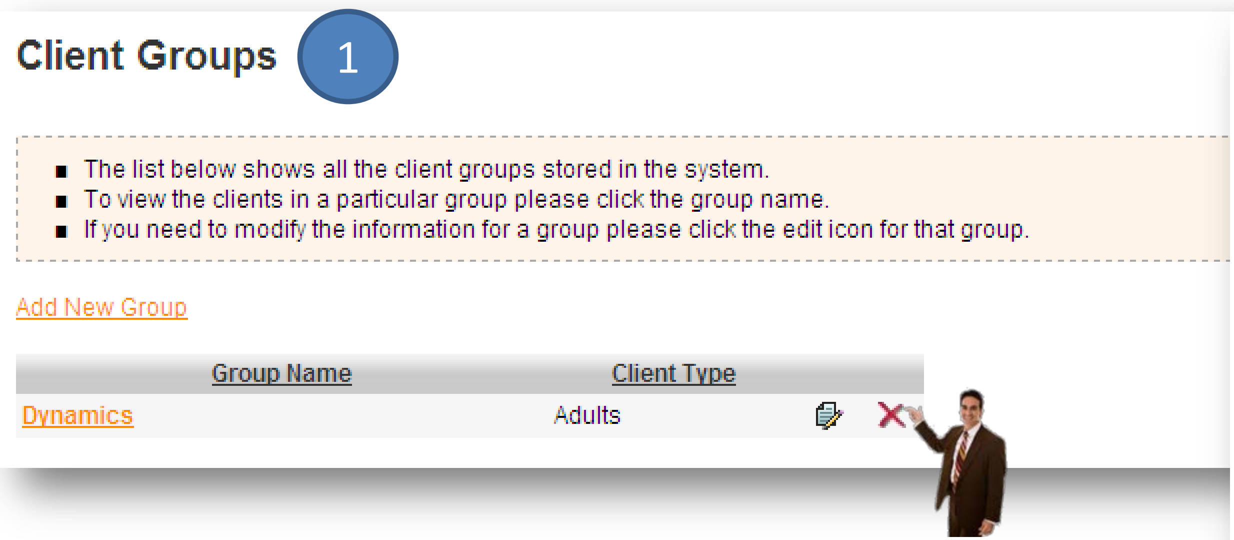
✓ To Edit Group Information:

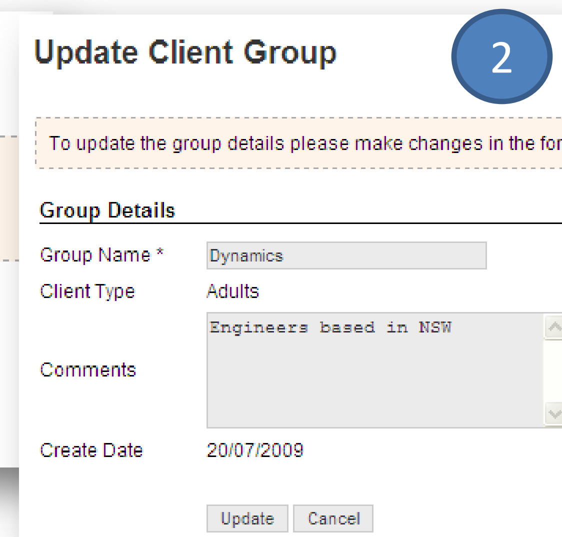
Step 1: Go to Client Groups page.

Step 2: Click on the corresponding ‘paper & pencil’ icon in the far right column of the target group. Please see in picture 1.

Step 3: Change any record under “**Group Details**”.

Step 4: After Editing, Click **Update** to record changes.



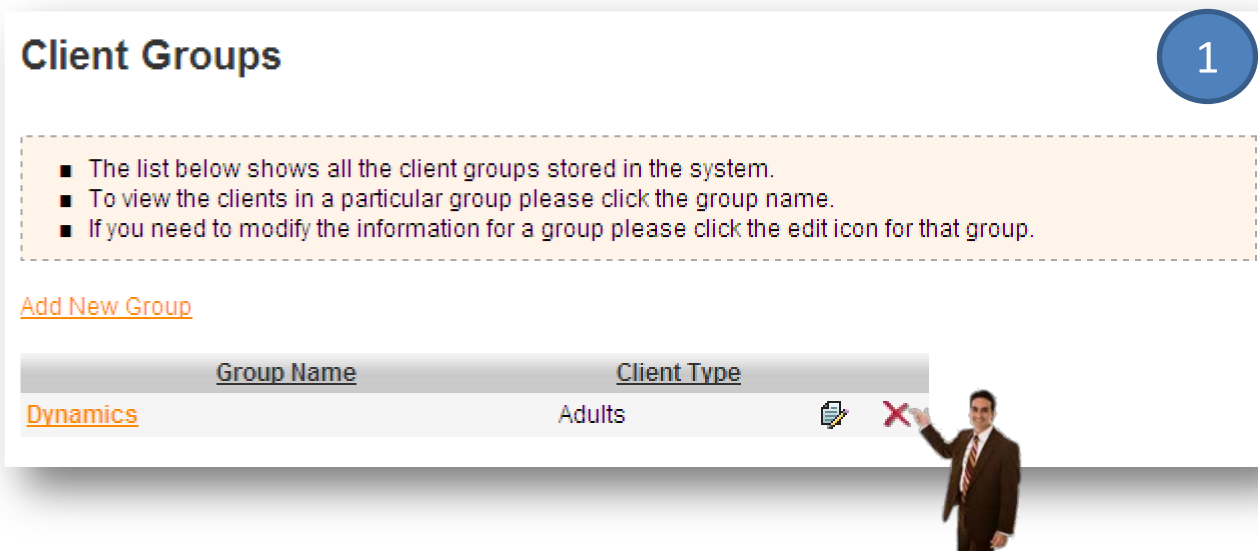


Cont'd

✓ To Delete Group:

Step 1: Click on the red cross sign on the right hand side of the group. You will be prompted to confirm if you really want to delete the group.

Please note: Groups once deleted can not be restored.



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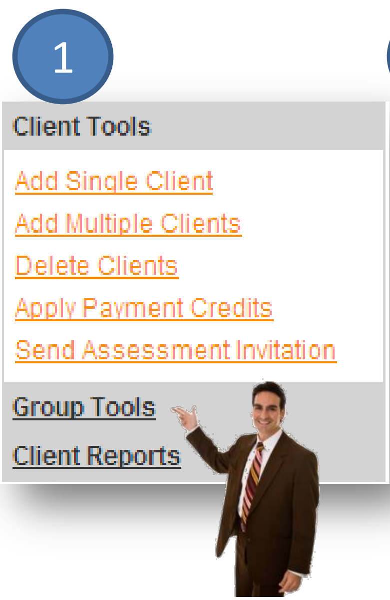
9.3 Changing a Client from one Group to Another

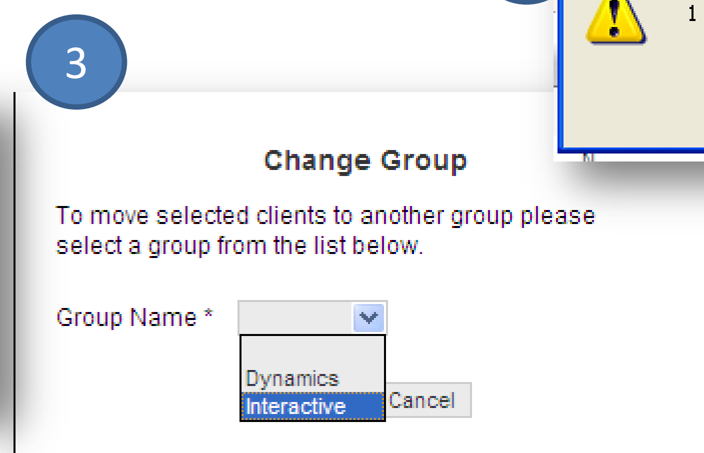
Step 1: Open the client’s current Group.

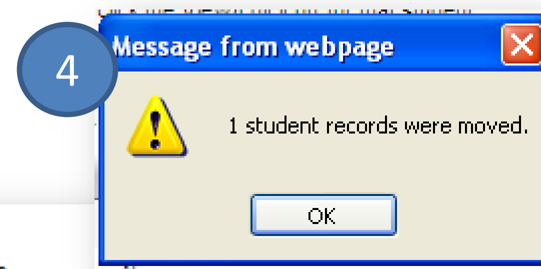
Step 2: Select the target client by checking the box and click on Group Tools as shown in picture 1.

Step 3: Click on **Change Group**. You will be prompted to select the new Client Group which can be selected from a drop down menu.

Step 4: After selection, click **Submit**.







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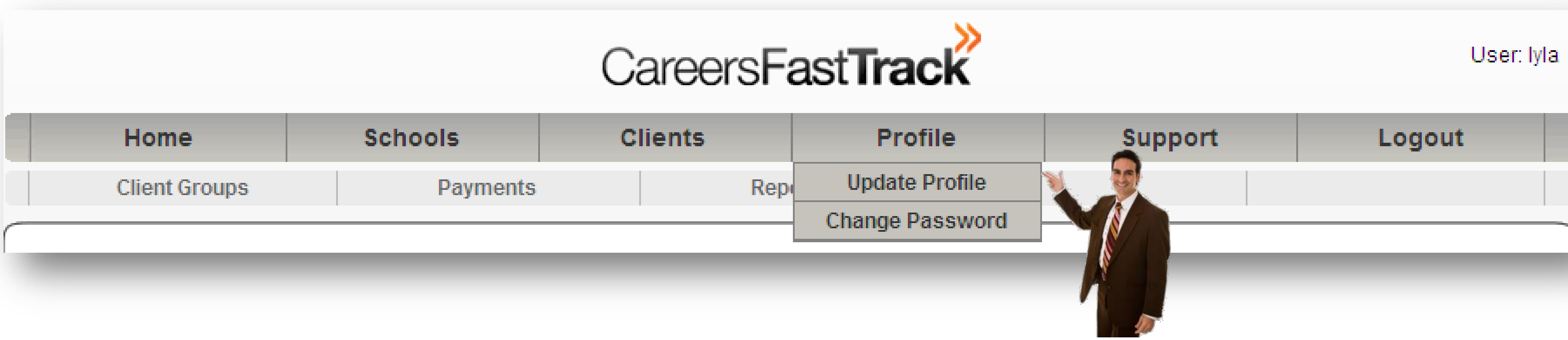
9.4 Update Consultant’s Profile

- **Step 1**: Click on Update Profile under Profile in the top toolbar menu.
- **Step 2**: Click **Edit** at the bottom of the page.
- **Step 3**: Update your information and click **Update**.
- **Note:** You can update your personal and business info with your business logo so all reports are branded with your Name and Consultancy.



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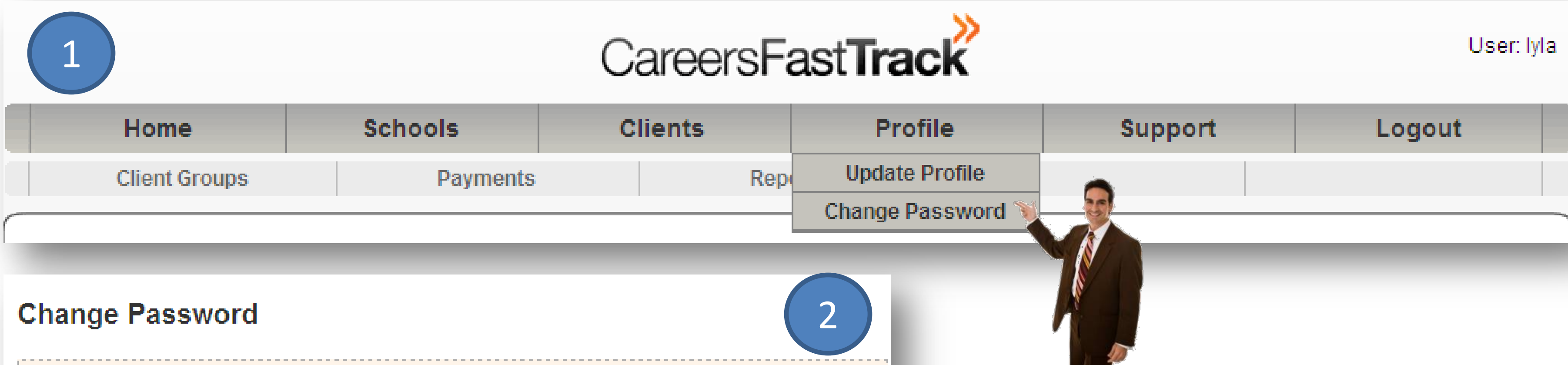
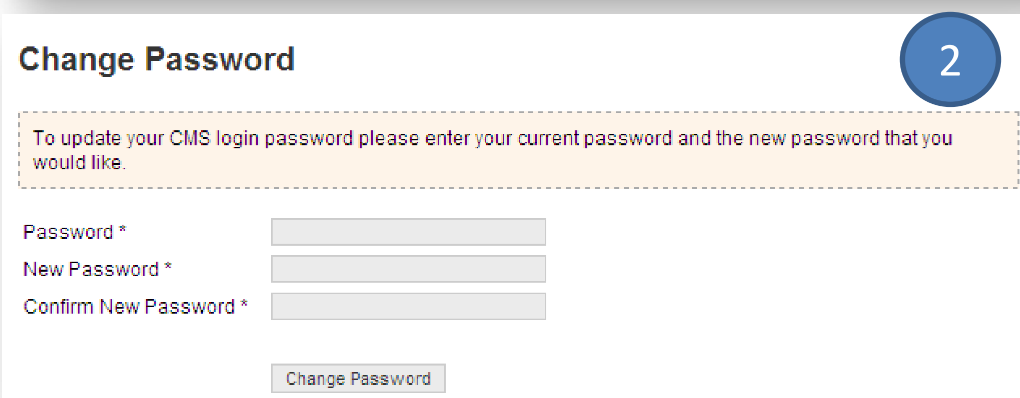
9.5 Change Password

- **Step 1**: Click on **Change Password** under Profile in the top toolbar menu.
- **Step 2**: Enter your old and new passwords and click **Change Password**.





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10. Client Information Management

10.1 Client Information
10.2 Assessments & Reports
10.3 Communication Log
10.4 Client Meetings
10.5 Client Resume

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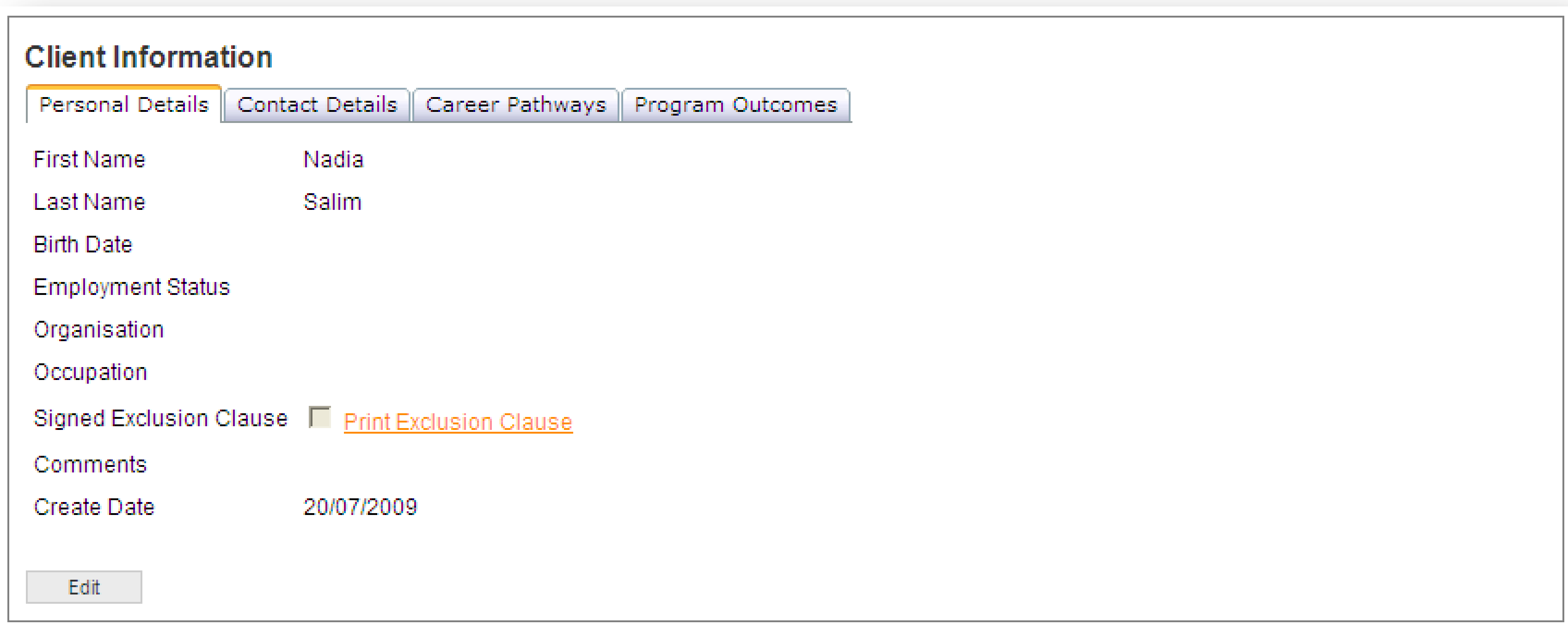
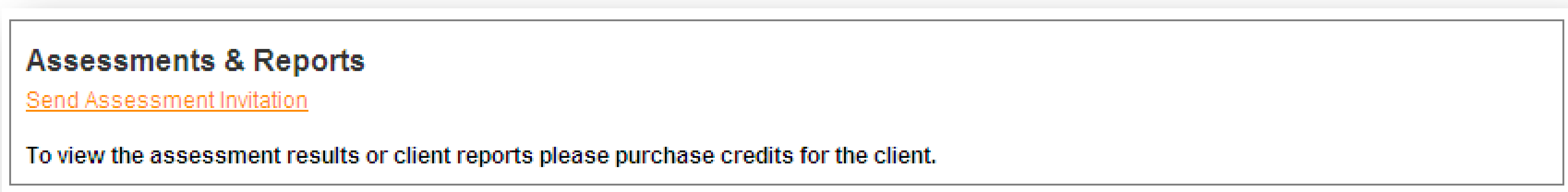
10.1 Client Information

- In this section, you can maintain detailed information about your client including: personal details, contact details, career pathways and program outcomes
- Click on Edit at the bottom of the section to update information.



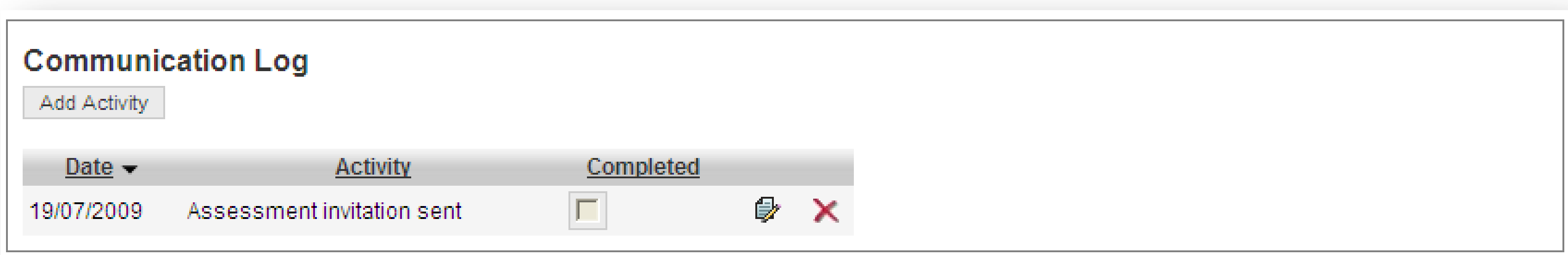
10.2 Assessments and Reports

- This section allows you to manage the assessments that you have conducted with your client.
- All sent and completed assessments will appear in this section.
- To send any new assessment, click on **Send Assessment Invitation** and follow the instructions.



10.3 Communication Log

- The communication log allows you to record all of your communications with your client.
- It is highly recommended that consultants maintain records of their communication with their clients.
- Most activities are auto-recorded here (eg. Sending assessments)
- Keep accurate records of telephone dialogue or tasks the client needs to perform.
- These records are important to keep track of client progress.



10.4 Client Meetings

- Use this section to manage your meetings with your clients.
- You can book clients for counselling and email them details
- You can use the template to send them feedback & actions following counselling
- You can evaluate their progress following counselling

Client Meetings

Add Meeting

Date	Meeting Number	Due Date			
29/06/2009	2	29/06/2009	Email Feedback	Email Progress Evaluation	View Progress Evaluation
3/06/2009	2	3/06/2009	Email Feedback	Email Progress Evaluation	View Progress Evaluation
29/04/2009	1		Email Feedback	Email Progress Evaluation	View Progress Evaluation

10.5 Client Resume

- Client Resume is a powerful tool to build a resume for your client.
- You can automatically send resume to your client via email
- This becomes a living document you refine with the client
- The resume is easily transferred to a document

The Career Management System ™

Client User Manual

Help Desk
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