



The Career Management System TM

Private Consultants User Manual

Help Desk

+61 3 8844 9444

info@careersfasttrack.com.au



Table of Contents

1. [How to log into CMS?](#)
2. [Consultant's Home Page](#)
3. [How to create a Group?](#)
4. [How to add clients to the Group?](#)
5. [How to send Assessment invitation to clients?](#)
6. [How to access client Reports?](#)
7. [How to Purchase Credits?](#)
8. [How to Apply a Credit?](#)
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 [Update Consultant's Profile](#)
 - 9.5 [Change Password](#)
10. [Client Information Management](#)
 - 10.1 [Client Information](#)
 - 10.2 [Assessments and Reports](#)
 - 10.3 [Communication Log](#)
 - 10.4 [Clients Meetings](#)
 - 10.5 [Client Resume](#)

1. How to log into CMS?

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

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



You may be surprised how quickly your career can take-off.

Members Login

Username

Password

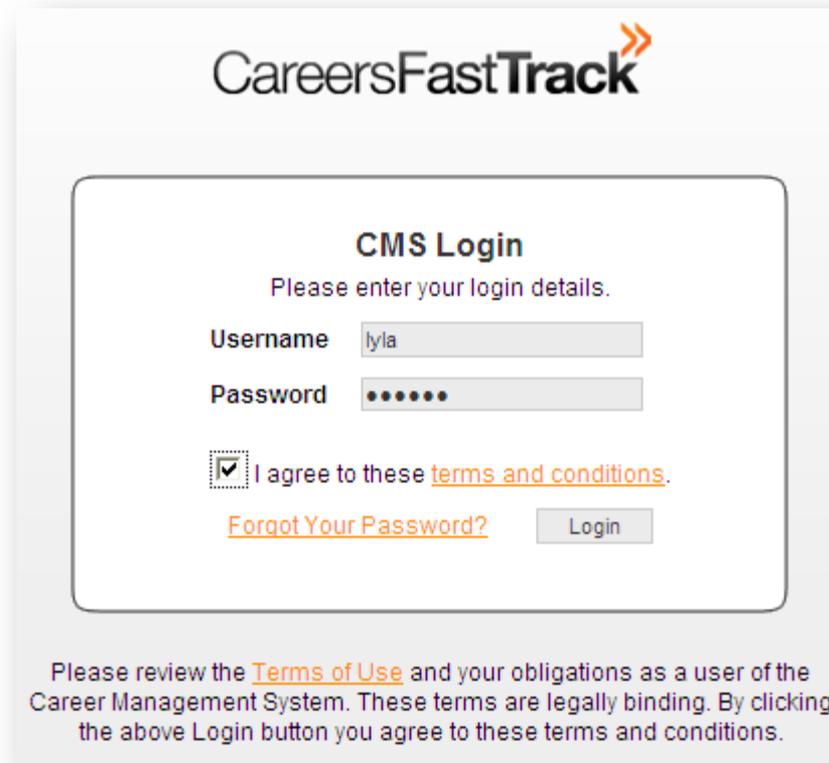
[Forgot Password?](#)

Career Management System



Step 3:

- ☑ Enter your username and password
- ☑ check the Box “**Agree to Terms of Use**”.
- ☑ Click **Login**.



The screenshot shows the CareersFastTrack CMS Login interface. At the top is the CareersFastTrack logo. Below it is a rounded rectangular box containing the following elements:

- CMS Login** title
- Instruction: "Please enter your login details."
- Username field: Labeled "Username", containing the text "lyla".
- Password field: Labeled "Password", containing six dots.
- Agreement checkbox: A checked checkbox followed by the text "I agree to these [terms and conditions](#)."
- Links: "[Forgot Your Password?](#)" and a "Login" button.

Below the login box, a disclaimer reads: "Please review the [Terms of Use](#) and your obligations as a user of the Career Management System. These terms are legally binding. By clicking the above Login button you agree to these terms and conditions."

2. Consultant's Home Page

Your name appears here

CareersFastTrack

User: lyla

Home

Schools

Clients

Profile

Support

Logout

Careers Fast Track - Career Management System

Latest Promotions

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.

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](#).

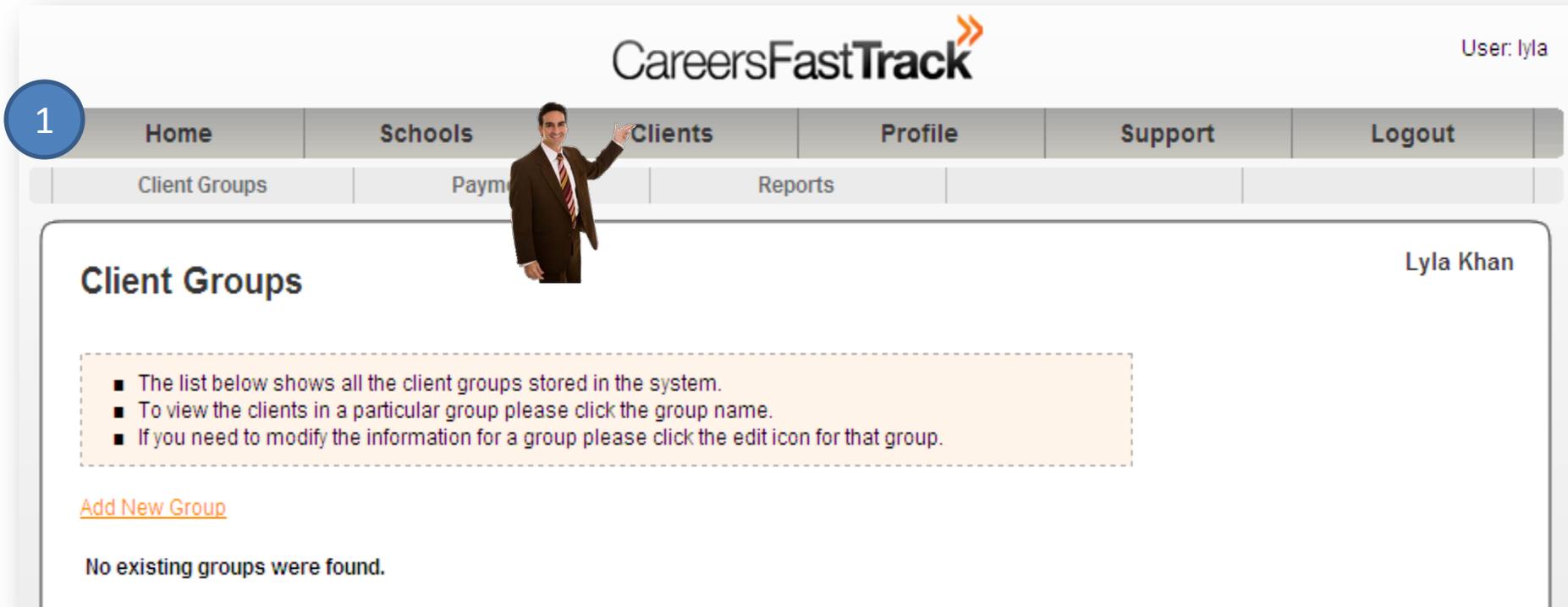
Update

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



3. How to Create a Group?

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



The screenshot shows the CareersFastTrack web application interface. At the top, the logo 'CareersFastTrack' is displayed on the left, and 'User: lyla' is on the right. Below the logo is a navigation toolbar with several menu items: 'Home', 'Schools', 'Clients', 'Profile', 'Support', and 'Logout'. The 'Clients' menu item is highlighted with a blue circle containing the number '1'. A man in a suit is standing in front of the 'Clients' menu item, pointing towards it. Below the navigation toolbar, there is a sub-menu with 'Client Groups', 'Paym', and 'Reports'. The main content area is titled 'Client Groups' and shows a message: 'No existing groups were found.' There is also a link 'Add New Group' and a list of instructions for viewing and modifying client groups.

1

Home Schools **Clients** Profile Support Logout

Client Groups Paym Reports

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.

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 the

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

Engineers based in NSW

Comments

Add

Cancel

- ☑ 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](#)

<u>Group Name</u>	<u>Client Type</u>	
Dynamics	Adults	 



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)

The screenshot shows a web interface for managing clients. At the top left, a blue circle with the number '1' is next to the title 'Manage Dynamics Clients'. In the top right corner, the name 'Lyla Khan' is displayed. Below the title, there is a dashed orange box containing three instructions: 'The list below displays all the clients in the selected group.', 'To view or edit information about a particular client click the View/Edit icon for that client.', and 'To use any of the client tools or view client reports, first select the clients by clicking the check box next to the client records.' Below this box, it states 'No existing clients were found in the selected group.' On the right side, it shows 'Client Count: 0' and 'Credit Balance: 0'. At the bottom right, there is a 'Client Tools' menu with options: 'Add Single Client', 'Add Multiple Clients', 'Delete Clients', 'Apply Payment Credits', and 'Send Assessment Invitation'. Below this is a 'Group Tools' section with a 'Client Reports' link. A man in a suit is pointing towards the 'Add Single Client' and 'Group Tools' sections. A blue box on the left contains the text 'Your Newly Created Group Name'. Blue arrows from the list above point to the 'Add Single Client' and 'Group Tools' sections in the screenshot.

1 Manage Dynamics Clients

Lyla Khan

Client Count: 0
Credit Balance: 0

No existing clients were found in the selected group.

Your Newly Created Group Name

Client Tools

- [Add Single Client](#)
- [Add Multiple Clients](#)
- [Delete Clients](#)
- [Apply Payment Credits](#)
- [Send Assessment Invitation](#)

Group Tools

Client Reports

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**.

Add Client to Group

First Name *

Last Name *

Email Address *

2

Client Tools

- [Add Single Client](#)
- [Add Multiple Clients](#)
- [Delete Clients](#)
- [Apply Payment Credits](#)
- [Send Assessment Invitation](#)



Group Tools

[Client Reports](#)

3

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

4

Manage Dynamics Clients

- The list below displays all the clients in the selected group.
- To view or edit information about a particular client click the View/Edit icon for that client.
- To use any of the client tools or view client reports, first select the clients by clicking the check box next to the client records.
- Client results and reports would not be viewable until credits are applied to the client record.

<input type="checkbox"/>	<u>First Name</u>	<u>Last Name</u> ▲	<u>Paid</u>	<u>Create Date</u>	<u>Assessments Completed</u>
<input type="checkbox"/>	Bill	Pope		19/07/2009	

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).



2

Add Multiple Clients

Lyla Khan

To add multiple client records please enter the information below. Please enter the First Name, Last Name and Email Address for each client.

	First Name *	Last Name *	Email Address *
1.	Bill	Frost	bill@hotmail.com
2.	Steven	Grant	steven@gmail.com
3.	Nadia	Salim	nadia@gmail.com
4.	Michelle	Hans	michelle@yahoo.com

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**.

1

Client Tools

[Add Single Client](#)

[Add Multiple Clients](#)

[Delete Clients](#)

[Apply Payment Credits](#)

[Send Assessment Invitation](#)

[Group Tools](#)

[Client Reports](#)



2

Client Tools

[Group Tools](#)

[Change Group](#)

[Group Registration Link](#)

[Group Summary](#)

[Client Reports](#)



3

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:
- | | |
|--|--|
| <input checked="" type="checkbox"/> Career Interest Assessment | <input type="checkbox"/> Career Obstacles Assessment |
| <input checked="" type="checkbox"/> Client History Questionnaire | <input type="checkbox"/> Industry Exploration Assessment |
| <input type="checkbox"/> Personality Assessment | <input type="checkbox"/> Resume |
| <input type="checkbox"/> Skills Assessment | <input checked="" type="checkbox"/> Transferable Skills Assessment |
| <input type="checkbox"/> Values Assessment | |

Create Link

Close

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.

- | | |
|--|--|
| <input checked="" type="checkbox"/> Career Interest Assessment | <input type="checkbox"/> Career Obstacles Assessment |
| <input checked="" type="checkbox"/> Client History Questionnaire | <input type="checkbox"/> Industry Exploration Assessment |
| Assessments: <input type="checkbox"/> Personality Assessment | <input type="checkbox"/> Resume |
| <input type="checkbox"/> Skills Assessment | <input checked="" type="checkbox"/> Transferable Skills Assessment |
| <input type="checkbox"/> 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



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 *	<input type="text" value="Prince"/>
Last Name *	<input type="text" value="Jack"/>
Home Phone	<input type="text" value="03 8888 9999"/>
Work Phone	<input type="text"/>
Mobile	<input type="text" value="0400 2222 2222"/>
Email Address *	<input type="text" value="prince@yahoo.com"/>

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

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.

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**.

1

Manage Dynamics Clients

- The list below displays all the clients in the selected group.
- To view or edit information about a particular client click the View/Edit icon for that client.
- To use any of the client tools or view client reports, first select the clients by clicking the check box next to the client records.
- Client results and reports would not be viewable until credits are applied to the client record.

<input checked="" type="checkbox"/>	First Name	Last Name ▲	Paid	Create Date	Assessments Completed
<input checked="" type="checkbox"/>	Bill	Frost		20/07/2009	
<input checked="" type="checkbox"/>	Steven	Grant		20/07/2009	
<input checked="" type="checkbox"/>	Michelle	Hans		20/07/2009	
<input checked="" type="checkbox"/>	Nadia	Salim		20/07/2009	

2

Client Tools

- [Add Single Client](#)
- [Add Multiple Clients](#)
- [Delete Clients](#)
- [Apply Payment Credits](#)
- [Send Assessment Invitation](#)

Group Tools

Client Reports



3

Home

Schools

Clients

Profile

Support

Logout

Client Groups

Payments

Reports

Send Assessment Invitation Emails

Lyla Khan

- 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 *

- | | |
|---|--|
| <input type="checkbox"/> Career Interest Assessment | <input type="checkbox"/> Career Obstacles Assessment |
| <input type="checkbox"/> Client History Questionnaire | <input type="checkbox"/> Industry Exploration Assessment |
| <input type="checkbox"/> Personality Assessment | <input type="checkbox"/> Resume |
| <input type="checkbox"/> Skills Assessment | <input type="checkbox"/> Transferable Skills Assessment |
| <input type="checkbox"/> Values Assessment | |

Step 4

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

6. How to access Client Reports?

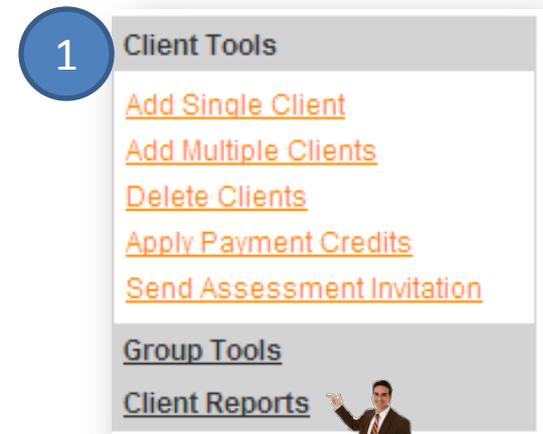
Quick Tip

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.



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.

Manage Dynamics Clients

- The list below displays all the clients in the selected group.
- To view or edit information about a particular client click the View/Edit icon for that client.
- To use any of the client tools or view client reports, first select the clients by clicking the check box next to the client records.
- Client results and reports would not be viewable until credits are applied to the client record.

<input checked="" type="checkbox"/>	First Name	Last Name ▲	Paid	Create Date	Assessments Completed
<input checked="" type="checkbox"/>	Bill	Frost		20/07/2009	
<input checked="" type="checkbox"/>	Steven	Grant		20/07/2009	
<input checked="" type="checkbox"/>	Michelle	Hans		20/07/2009	
<input checked="" type="checkbox"/>	Nadia	Salim		20/07/2009	

Lyla Khan

Client Count: 4
Credit Balance: 0

Client Tools

[Group Tools](#)

Client Reports

[Client History](#)

[Career-Life Values](#)

[Career-Life Skills](#)

[Career Obstacles](#)

[Career Path Interest](#)

[Personal Profile](#)

[Resume](#)

[Snapshot](#)

[Transferable Skills](#)



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.

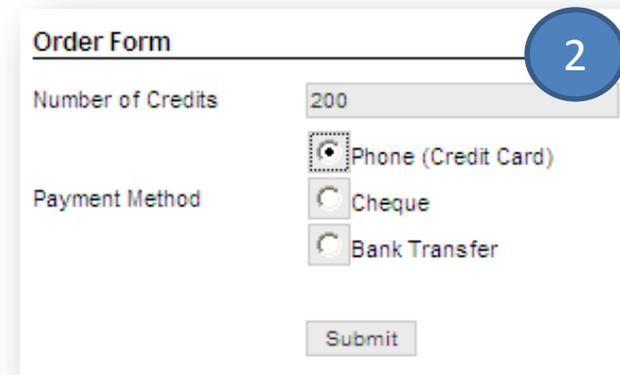
7. How to Purchase Credits?

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**.



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.

Client Tools

- [Add Single Client](#)
- [Add Multiple Clients](#)
- [Delete Clients](#)
- [Apply Payment Credits](#)
- [Send Assessment Invitations](#)

Group Tools

Client Reports

Message from webpage

Are you sure you want to apply Payment Credits to selected records?

OK Cancel

<input type="checkbox"/>	First Name	Last Name	Paid	Create Date	Assessments Completed
<input type="checkbox"/>	Jo	Blow		19/07/2009	
<input type="checkbox"/>	Alic	Friend		19/07/2009	
<input type="checkbox"/>	Jacob	Marshall		19/07/2009	
<input type="checkbox"/>	Raj	Patel		19/07/2009	
<input type="checkbox"/>	Bill	Pope		19/07/2009	

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

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.

Manage Dynamics Clients

1

- The list below displays all the clients in the selected group.
- To view or edit information about a particular client click the View/Edit icon for that client.
- To use any of the client tools or view client reports, first select the clients by clicking the check box next to the client records.
- Client results and reports would not be viewable until credits are applied to the client record.

<input type="checkbox"/>	First Name	Last Name ▲	Paid	Create Date	Assessments Completed
<input checked="" type="checkbox"/>	Bill	Frost		20/07/2009	
<input type="checkbox"/>	Steven	Grant		20/07/2009	
<input type="checkbox"/>	Michelle	Hans		20/07/2009	
<input type="checkbox"/>	Prince	Jack		20/07/2009	
<input type="checkbox"/>	Nadia	Salim		20/07/2009	



Client Information

2

Personal Details Contact Details Career Pathways Program Outcomes

First Name Bill
 Last Name Frost
 Birth Date
 Employment Status
 Organisation
 Occupation
 Signed Exclusion Clause [Print Exclusion Clause](#)
 Comments
 Create Date 20/07/2009

Edit

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.

Client Groups 1

- 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	

Update Client Group 2

To update the group details please make changes in the form

Group Details

Group Name *

Client Type

Comments

Create Date 20/07/2009



✓ **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.

Client Groups 1

- 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	



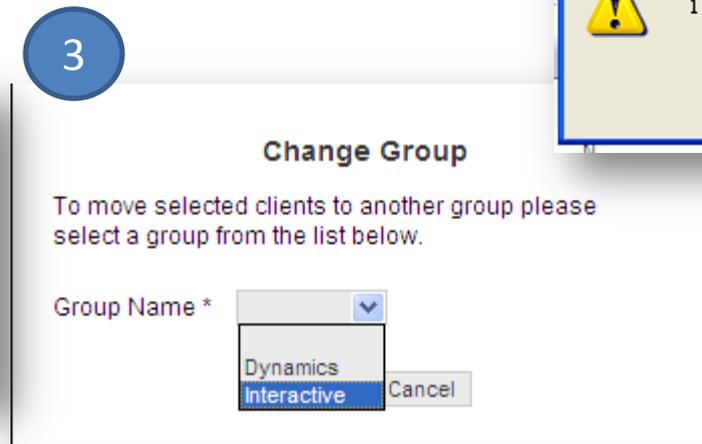
9.3 Changing a Client from one Group to Another

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.

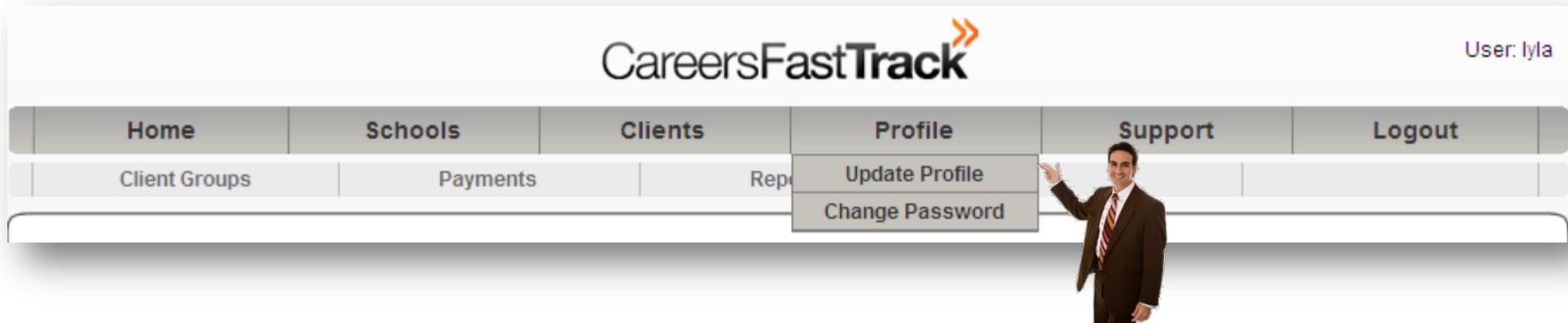
Step 3: Click on **Change Group**. You will be prompted to select the new Client Group which can be selected from a drop down menu.

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



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.



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**.

1

CareersFastTrack

User: lyla

Home Schools Clients Profile Support Logout

Client Groups Payments Rep Update Profile Change Password

2

Change Password

To update your CMS login password please enter your current password and the new password that you would like.

Password *

New Password *

Confirm New Password *

10. Client Information Management

10.1 Client Information

10.2 Assessments & Reports

10.3 Communication Log

10.4 Client Meetings

10.5 Client Resume

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.

Client Information

Personal Details | Contact Details | Career Pathways | Program Outcomes

First Name	Nadia
Last Name	Salim
Birth Date	
Employment Status	
Organisation	
Occupation	
Signed Exclusion Clause	<input type="checkbox"/> Print Exclusion Clause
Comments	
Create Date	20/07/2009

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.

Assessments & Reports

[Send Assessment Invitation](#)

To view the assessment results or client reports please purchase credits for the client.

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.

Communication Log			
<input type="button" value="Add Activity"/>			
Date ▾	Activity	Completed	
19/07/2009	Assessment invitation sent	<input type="checkbox"/>	 

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

Client Resume

Resume Status: Not Completed

[Edit Resume](#)

[View Resume](#)

[Email Resume to Client](#)



The Career Management System TM

Client User Manual

Help Desk

+61 3 8844 9444

info@careersfasttrack.com.au

