TCI+ Client Management in My Dashboard

Vocational Rehabilitation Counselors who log in to The Career Index Plus with an official work email address, and workforce partners who request access to the **My Dashboard** feature can create client accounts, invite clients to use The Career Index Plus website, add clients for tracking, track client progress, and import client profiles.

## My Stuff – My Dashboard

Adding a client allows a counselor or workforce partner to create a client account, invite the client to use The Career Index Plus, and ask permission to access the client’s profile and usage information. To access this function, please follow these instructions to navigate to the **My Dashboard** screen.

| 1. From any screen within the counselor’s account, click on **My Stuff**. 2. Enter your password and click **Submit**. 3. Click **My Dashboard**. 4. Click **Add Client**. 5. Follow the on-screen instructions. 6. Repeat for additional clients | Picture of 'My Dashboard' from the website |
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# Inviting a Client

If the **Invite Client** option is selected, the client will receive an email invitation containing a link to The Career Index Plus. Clicking the link in the email opens **The Career Index Plus** login screen with the client’s username prefilled. When the client accesses The Career Index Plus for the first time, s/he will be notified that the counselor will have access his/her profile and usage information. If the client wants to revoke permission, this is done within the Account tab located on every page.

Screenshot of the Account Tab

A client account may only be linked to one counselor account at a time. Clients cannot view any of the counselor’s account information, nor can they view any other client’s information.

If the **Create Client, No Invite** option is selected, it will not create a client account or send an email invitation, but it will create a client profile that will be accessible only via the counselor’s account.

## Tracking Client Progress

If a client has been added to the counselor’s account, the list of all currently tracked clients appears on the **My Dashboard** tab.

Next to each client’s name and email address, the counselor has data on whether the client’s **My Stuff** profile is available (the client may revoke permission at any time), when the client account was created, whether and when the client was invited via email, when the client last visited The Career Index Plus, how many activities the client has completed (page views), and how many times the client has visited The Career Index Plus (total visits). A **Stop Tracking** column allows the counselor to discontinue his/her access to the client’s profile and usage information.

Clicking on a client name shows the client’s activity history, as well as the option to activate the profile, or to send an invitation to invite a client to add an email address (if one was not input originally).

# Show History

By selecting **Show History**, the system displays information on the client activity, including the date(s) that the client logged in and a brief description of his or her activity on each date. The table content can be sorted by column heading, searched, and printed as needed.

# Activating a Client’s Profile

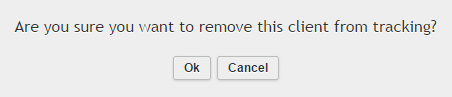
If a tracked client has created a **My Stuff** profile in his or her client account, a counselor can import the client profile by clicking the client’s name and then clicking the **Activate Profile** button at the bottom of the screen. This will update the counselor’s account to reflect the information the client has added to the system. This feature may be used with a client participating (working alongside a client) or independent of the client (research for a comprehensive assessment).

Once a client account has been imported, all screens within the counselor’s account will show the same information the client would see based on the client profile. For example, clicking the **Profile** tab from the counselor’s account would show the client’s profile. Clicking the **Occupations** tab from the counselor’s account would show the client’s saved occupations. Similarly, results on the **Fit** screen would show Fit in relation to the client’s profile.

To import a different profile, return to the **My Dashboard** screen and click on a different name, and click **Activate Profile** button.

## Removing a Client from Tracking

To stop tracking a client, return to the **My Dashboard** tab, and check the box under the **Stop Tracking** column. This will prompt the following warning message:



Selecting **Ok** will remove the client from the **My Dashboard** tab. The client will still be able to access his or her account, but the counselor will no longer have access to the client’s profile and usage information. Untracked client accounts can be re-added at any time for tracking again in the future. To re-add a previous client, or to add another client, click **Add Client** and input their email address. It will automatically link to the existing account.

If you have recommendations for how to make the profile more useful, please let us know by posting a comment using the comment link at the bottom of every screen.

# Screenshot of the bottom of every page of TCI+, showing Comments, Questions, About Us, Terms of Service, and Privacy.