INSIGHTFILL USER GUIDE: Version 2.0.1

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This User Guide provides instructions for using the InsightFill website for generating various documents related to a psychological assessment.

This user guide is searchable. To search for a word or phrase, in Adobe, type CTRL-F on a PC or Command-F on a Mac. Enter a word or phrase in the Find textbox and press enter.

Where you see an instruction to "**click**" on a button or link, you may also be able to tap the same item if you have a touch screen on your device or you may be able to press enter if your cursor is already positioned on the button or link.

A Note about Spelling

Certain words are spelled differently in various countries. For example, the word "behavior" in the US would be spelled "behaviour" in Canada. There are similar differences between North America and other English-speaking countries (e.g., "organize" v. "organise"). In this User Guide and on the dialog interviews for the software, the US spelling will be used. This is in recognition that we anticipate that a majority of our users will be based in the US, but also reflects that nomenclature used in many of the test names is based on US spelling of words like "behavior" and "color". However, in the output document, we will attempt to use the appropriate spelling based on the Country that you select in your User Profile. When test and/or subtest names are inserted into documents they will be spelled as they appear in when selected in the interview. However, descriptions of the tests as well as titles and prose in the report will be spelled as appropriate for your country. Of course, for any text that you enter in text boxes, you would spell as you would normally do, and you have the option to modify the spelling of words in the Word document after assembly.

In order to have the correct spelling for your country appear in the output document, you must select your country from the User Country picklist when you set up your User Profile (i.e. "Canada" for Canadians, "USA" for Americans). See the topic "Setting up a New User Profile" below.

Microsoft Word DOCX Format Used by InsightFill

All documents assembled from the InsightFill system are created and stored in DOCX format. Microsoft introduced DOCX as part of its Word 2007 release for Windows and Office 08 for Mac and it is compatible with all subsequent versions of Word (versions 2010 and 2013 for Windows and Office 2011 for Mac, as well as Office365 for both Windows and Mac). For earlier releases of Microsoft Word for Windows (versions 2000 and 2003) you can install a free download of the Microsoft Office Compatibility Pack for 2007 Office System from Microsoft Office Online at http://www.microsoft.com/en-us/download/details.aspx?id=3. An update is also available for Office 04 on the Mac (http://www.microsoft.com/en-us/download/details.aspx?id=9416) and you also have to install the OpenXML File Format Converter for Mac (http://www.microsoft.com/en-us/download/details.aspx?id=19544). The

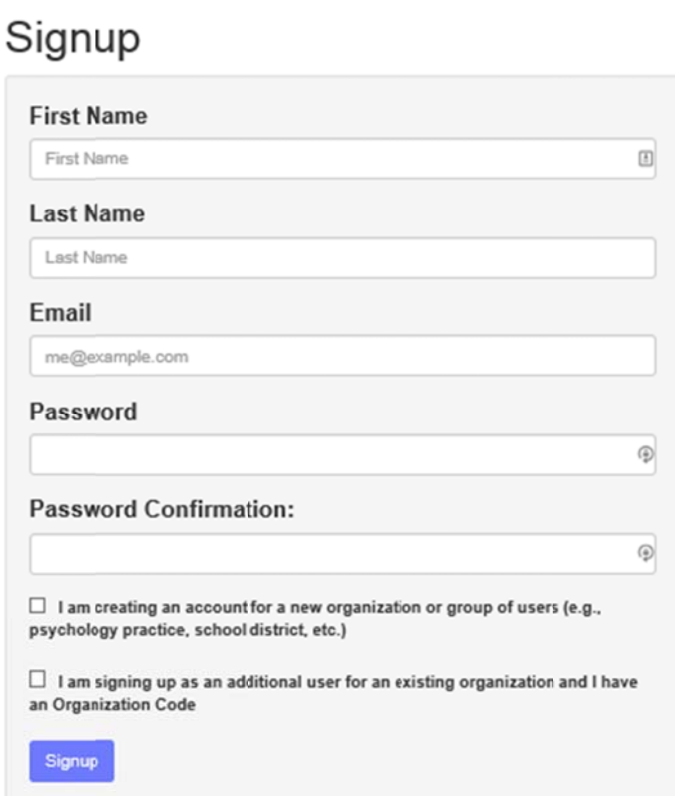
docx file format is supported by other word processing systems on Windows (OpenOffice and WordPerfect) and Mac OS (e.g. Pages). However, beware that non-Microsoft Word software does not necessarily display or edit DOCX format with 100% fidelity. In particular, things like tables, styles, etc. may not appear exactly as they do in MS Word. You may notice these differences most for the Appendix of Test Score Results document because it makes extensive use of tables and shading. We strongly recommend using a version of MS Word that fully supports the DOCX format, and that if you have an older version of MS Word or MS Office that you install the latest updates or compatibility packs.

Registering For the InsightFill Website

Before can use any features on the InsightFill site you must first register as a user. Most users will be provided with a 30-day free trial of the site (unless you are a user that has been given access as part of an organization). To register go to the following link:

http://reports2.insightfill.com/signup

The registration page will appear:



You can also register by going to our marketing website (www.insightfill.com) and clicking on the Signup link that is near the top right corner of the Home page. It will bring you to the same page as shown above.

NOTE: The two checkboxes at the bottom are optional. Check the first checkbox if you are signing up as the first user for an organization (such as a school district or psychology practice). Check the second checkbox only if you have been given an organization code for an existing organization and you have been instructed to sign up using that code. It is OK to leave both checkboxes unchecked if neither of them apply to you.

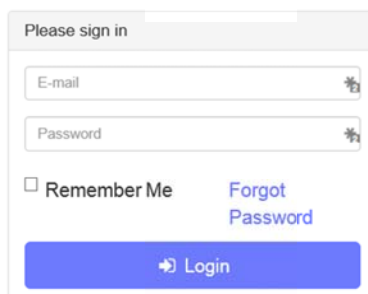
On the Signup page, complete the requested fields on the page and click on the Signup button. You will then be directed to the Login page for the website where you will use the login and password that you have just created.

If you signed up as a new organization (and checked the first checkbox above), additional users for your organization should be created using the **Add User** button from the **Users** tab rather than using the signup page. This will keep billing all users for the organization to a single account rather than billing each user separately. Please see the topic: **Creating Additional Users for Your Organization**.

Logging In To the Website

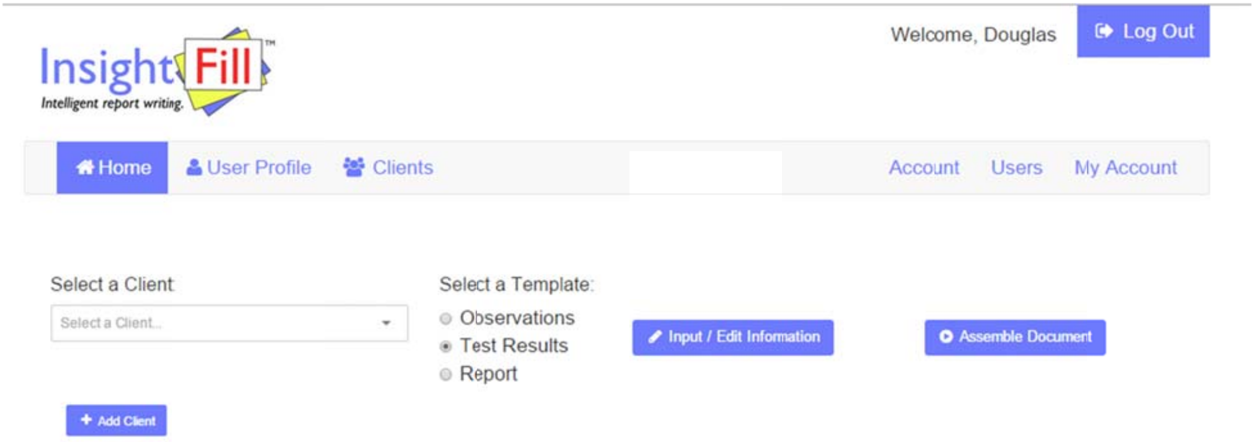
You will have been given a user id and password. To login:

1. Open your web browser and go to the following URL:
    a. https://reports2.insightfill.com
    You will be directed to the Login page:



    b. Enter you email address that you entered when you registered.
    c. Enter your password in the password field. The password is case-sensitive so make sure that your **CAPS LOCK** key is not on and that you type the letters in the upper- or lower-case as you entered it when you registered.
    d. Optionally check the "Remember Me" checkbox (your credentials will be stored only on your computer).
    e. Click on the Login button to finish logging in (If you are not successful at logging in, try again or click on the Forgot Password link to obtain or reset your password).

2. After you login, you will reach a page that looks as follows:



Notice that near the top right area of the page your first name is displayed and that there is a Logout button to the right of the user name.

Working with the main InsightFill Page

The page displayed above is the main working page or Home page of the InsightFill website.

Website Security

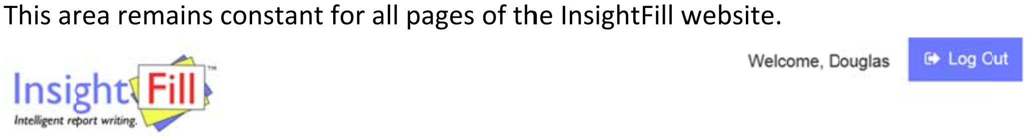
Notice in the URL bar at the top that the website address begins with **https:** and that there is a lock symbol in the URL bar. This means that you are communicating with the InsightFill Server using data encryption that is similar to what is used on bank websites. Nobody can intercept these encrypted communications between you and the InsightFill website.

Below the URL bar to the right of the page it tells you what user name you are logged in as and there is an icon to **Logout**. We strongly recommend that, when you are finished working on the site, you click on the **Logout** link rather than leaving the website open or simply closing your browser. This will ensure that no one can access your computer and go to the site without logging in again. It also frees resources on the server.

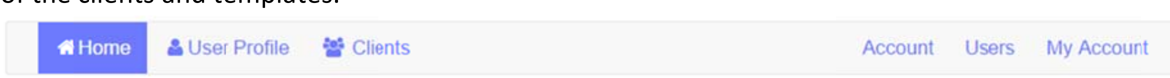
Exploring the Areas of the Home Page

The InsightFill site has the following page elements:

- The **Header** area contains the InsightFill logo, a Welcome message and a Logout button. This area remains constant for all pages of the InsightFill website.



- The **Navigation Menu** allows you to select various areas of the site to work on aspects of the clients and templates.



The navigation menu is visible throughout the site near the top of the page and allows you to select one of the following options:

1. **Home** brings you to the Home page where you will typically perform the most common functions related to completing interviews and assembling documents.
2. **User Profile** brings you to the area where you can set up the information about your organization and your personal details so you do not have to re-enter them for every document that you prepare.
3. **Clients** brings you to a list of your existing clients so that you can perform a variety of administrative tasks with the list.
4. **Account** displays a screen summarizing your account information including the type of subscription that you have and the expiry date of your subscription.
5. **Users** displays a list of users in your organization. This is only visible if you are in an organization that has multiple subscribers **and** you are the administrative user for the organization.
6. **Billing** displays a screen showing your options for subscribing or renewing your subscription and it shows you information about what amounts have been billed.

- The **Working Area** of each page varies depending on what option has been selected in the navigation menu. It will either display information or allow you to perform various tasks.

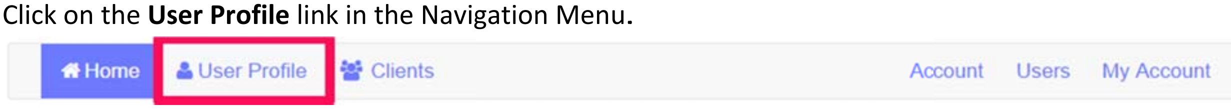
Setting up a new User Profile

The first time you login, if a User Profile has not been created for you, the User Profile page will be displayed automatically.

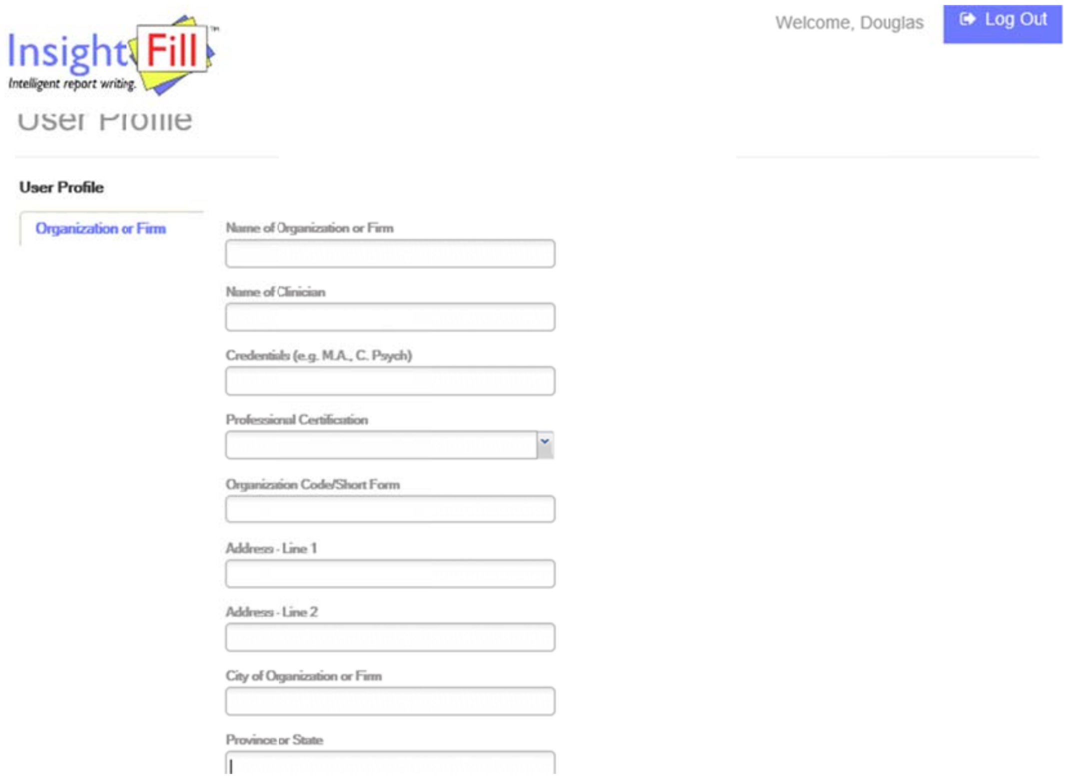
If you have already created a User Profile, skip this topic and go to **Preparing an Appendix of Test Score Results** below.

Before you start using the InsightFill system, you must first set up your user profile information. This is a one-time step and once your User Profile is set up you do not need to do this again unless your profile information changes. The User Profile collects information such as your name, organization/firm that you work for, address and other identifying information. To set up this information:

1. Click on the **User Profile** link in the Navigation Menu.

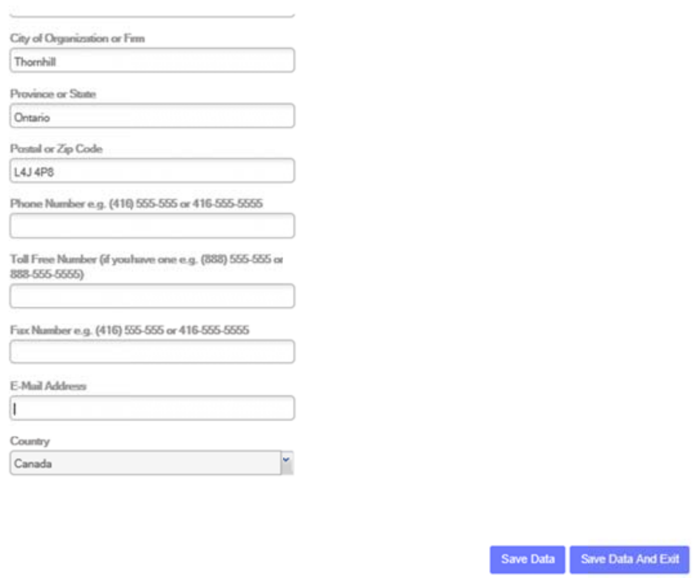


2. The **User Profile** interview is displayed. Complete the information in fields on this interview.



3. The Organization Code is a short form for an organization. In some cases, the template uses the Organization Code to produce customized output that is specific to your organization. If you have been provided with an organization code, you should enter it; otherwise you can leave the field blank.

4. **Be sure to select the User Country field as it controls the spelling of some words in the output documents.**

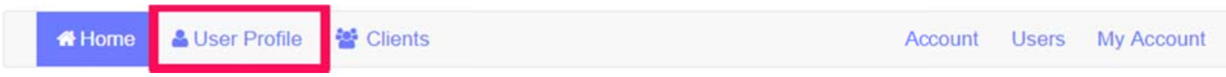


5. At the bottom of the interview (you may need to scroll down), click on the **Save Data** to update changes and continue editing the profile, or click on the **Save Data and Exit** button if you wish to save your data and exit the User Profile.

Updating Your User Profile

You can update your user profile in a manner similar to the way you created it. Here is how to do it:

1. Click on the User Profile link in the Navigation Menu.

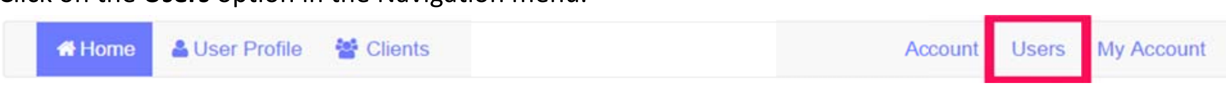


2. The User Profile interview is displayed showing the existing information of the User Profile. Change the information in any fields on this interview.
3. At the bottom of the interview (you may need to scroll down), click on the **Save Data** to update changes and continue editing the profile, or on the **Save Data and Exit** button if you wish to save your data and exit the User Profile.

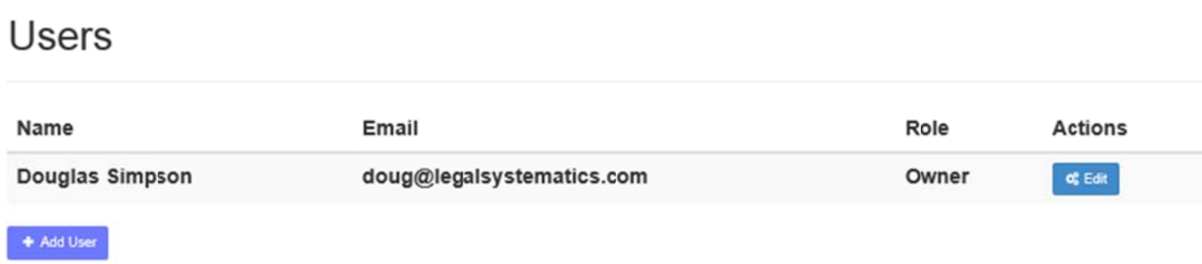
Creating Additional Users for Your Organization

If you have several users for an organization, you will create the first user account by going to the Signup page (see the topic above called "**Registering for the InsightFill Website**"). The initial user can then create additional accounts and set the rights for those users. You should do this if you want to keep control of the billing and maintenance of the user accounts for your organization under one account. To set up additional users:

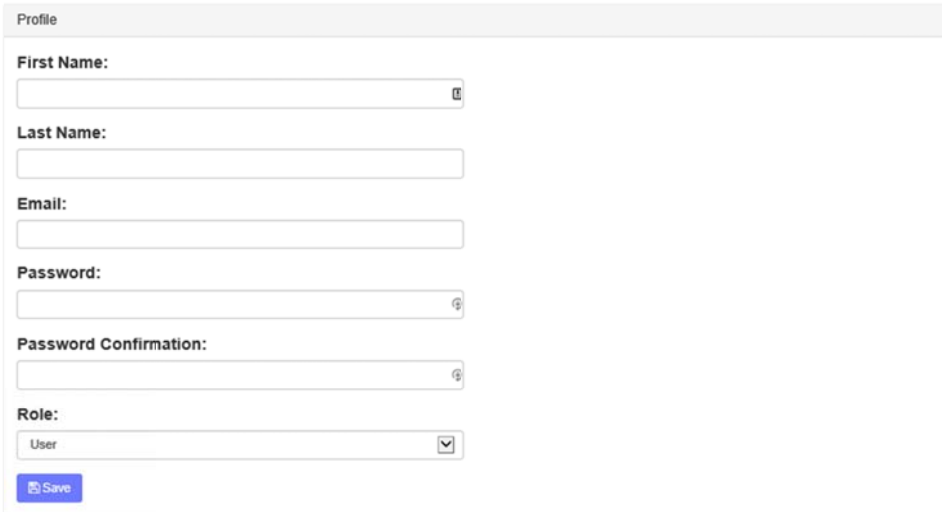
1. Click on the **Users** option in the Navigation menu.



2. The system will display a chart of the users in your organization:



3. To add a new user, click on the **Add User** button at the bottom of the list of users. Complete the form for the new user. There are two options for the Role (User and Owner). The "Owner" option allows a user to create additional users and set their rights. The "User" option allows a user to use the system but not administer the list of users.

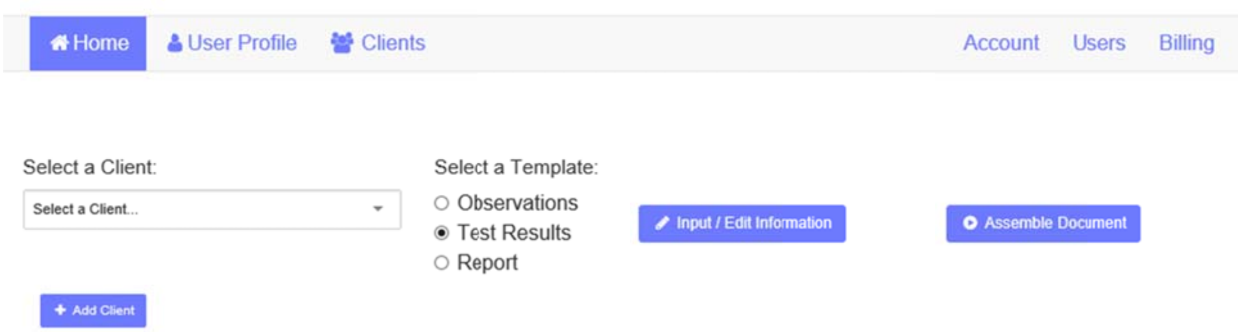


4. You should record the details of the email address and password for each user that you have created and then give the user the information. Each user should then go to the login page and login with those credentials. **NOTE: If a user has been created in this manner the user should NOT go to the signup page and create a new account -- they should go to the login page and use the credentials that you have created for them.**

Preparing an Appendix of Test Results

We recommend using the "back-to-front" approach for writing assessment reports. By this we mean that you should enter the data needed to prepare the Appendix of Test Results, then enter Observations, and then prepare the Report. By entering the Tests in the Test Results template you will also be populating the list of Tests on the front page of the Report. The Appendix of Test Results that is generated by the InsightFill system organizes and highlights information that you will use when writing the report. You can create the Appendix of Test Results as follows:

5. If you are not already on the **Home** page, click on the **Home** option in the Navigation menu.



The **Home Page** is the place where you will spend the most time. From this page you can create a new client, complete an interview or assemble a document. There are typically 4 steps:

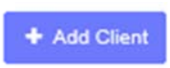
a. Either add a client **or** select an existing client
b. Choose one of three templates
c. Input/edit information about the selected template
d. Assemble a document

The fields on the **Home Page** are organized, left-to-right in the order that you might work on a document.

On the left side of the Home Page is a field that allows you to select a Client if you wish to re-use the data for that client.

You can select a client by clicking on the down arrow to the right of the field or by clicking into the field and typing the last name of the client. The names are sorted by last name. Usually you only need to type a few characters of the last name to hone in on the name you are looking for, but you can also use the scroll bar to navigate to other items in the list. Note that underneath the client name it displays the date and time that the information for that client was last updated.

6. If you want to add a new client to the list of available clients, simply click on the **Add Client** button that appears below the **Select a Client** field.

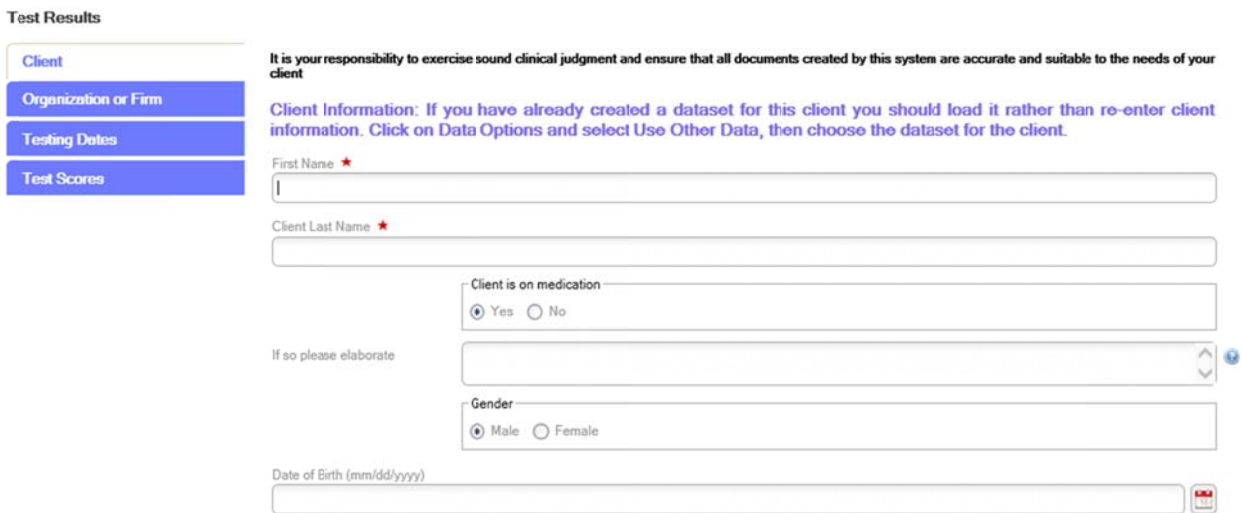


When you do that, a new page appears that allows you to enter the client's first and last name and a short description of what you are doing for the client (e.g. an assessment for July 2014).

After entering the first and last name of the client and a brief description, click on the **Save** button. The **Home Page** will be redisplayed and the client that you just created will be preselected in the **Select a Client** dropdown

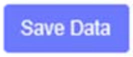
7. Choose one of the three radio button options from the **Select a Template** field: **Observations**, **Test Results** and **Report**. The default option is **Test Results**. Select **Test Results** if it is not already selected.
8. Click on the button labeled "Input/Edit Information": 

9. The **Appendix of Test Results** interview is displayed. The interview uses a wizard style that has a series of tabs in a column on the left. You can navigate through the interview using **Next** and **Back** buttons that appear near the bottom of each page or by clicking on one of the tabs on the left. The first tab of the Test Results interview is the Client tab.
10. You should start by entering information on the **Client** tab. If that tab is not already selected, please click on the **Client** tab.

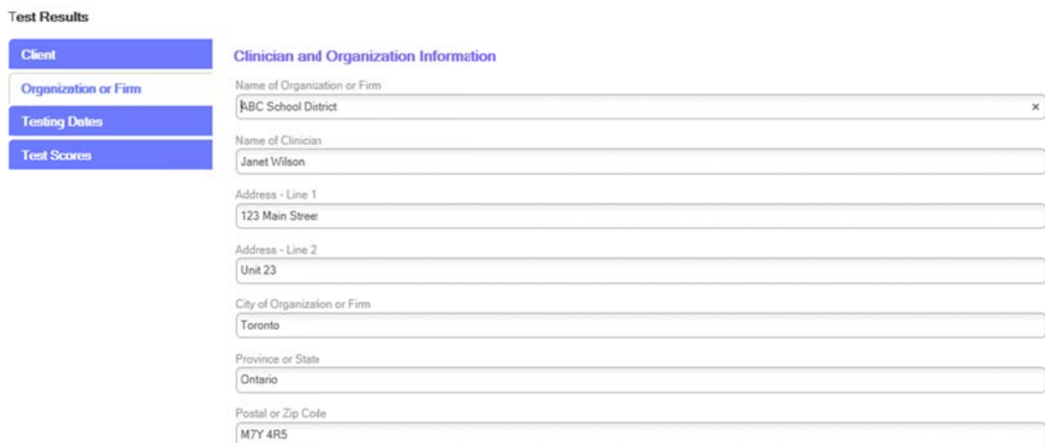


11. If you have previously entered information for the same client, that information will be displayed on the screen.
TIP: You can tell whether the information has been loaded for a client by clicking on the Client tab. If the client's first name and last name fields are blank, then it means that you have not loaded the existing client data. The asterisks beside the last name and first name fields mean that those two fields must be filled in before you can assemble a document. If the first and last name fields are filled in, it means that you have already loaded the information or you have typed in values.
12. Complete the information about the Client. For the Client's **date of birth** you can either type the date in "mm/dd/yyyy" format in the field or use the calendar icon on the right. Some of the information about the client's gender, age and school information is used to control language and options that are made available when preparing other documents, so you should endeavor to fill in as much information as possible on the Client.
13. As you work your way through the interview, please note that the system automatically saves your answers periodically (once every minute). If you are entering a substantial amount of data,

you can also save data by clicking on the **Save Data** button located near the bottom of your page:

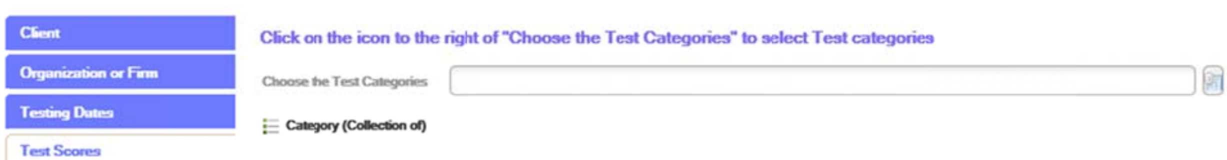


14. Complete the information in fields on this interview. You can navigate through the interview by completing the information on each tab. You can move to the next tab by clicking on the  button at the bottom right and you can go to the previous tab (if there is one) by clicking on the  button at the bottom left of the page. You can also click on any tab to move directly to that tab. Notice that your profile information has been entered automatically from the User Profile that you completed earlier.
15. You can either click on the **Next** button or click on the **Organization or Firm** tab to go to Organization or Firm page. Usually, you don't need to change anything on this page since it shows you the information that was entered in your User Profile.

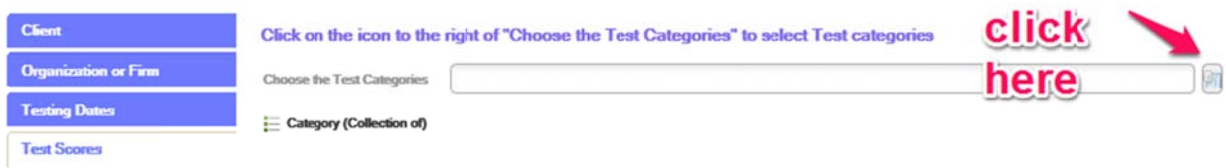


16. Click on the **Next** button or on the **Testing Dates** tab to move to the next tab. Enter the date(s) when testing was performed.

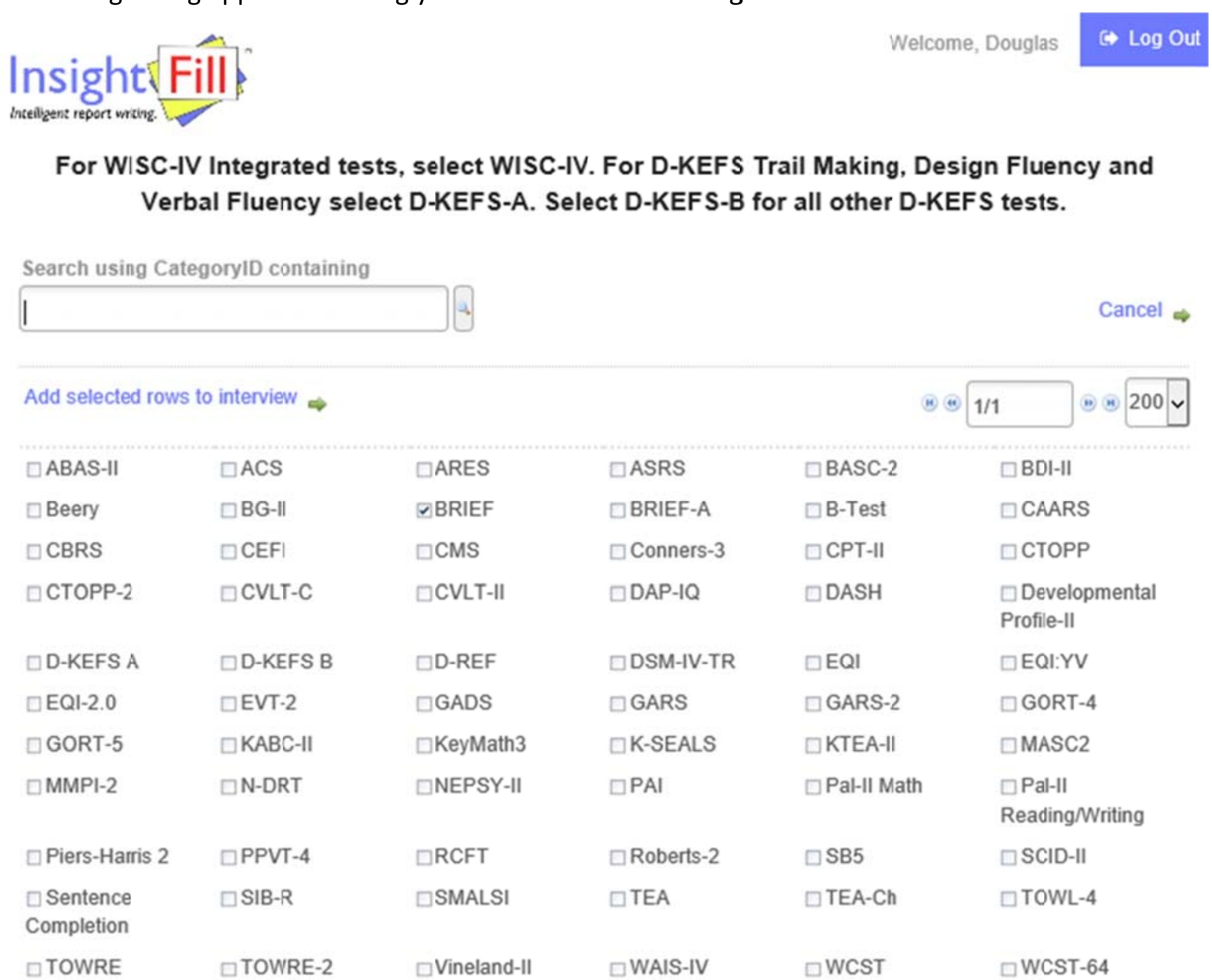
17. When you are finished entering information on the **Testing Dates** tab, either click on the **Test Scores** tab or click on the **Next** button.



18. You will enter Test Scores by first selecting the main categories (e.g. NEPSY, WISC-IV) and then entering a table for the sub-tests that were administered within that category. To choose the Test categories click on the icon ( ) that appears to the right of the "Choose the Test Categories" field.

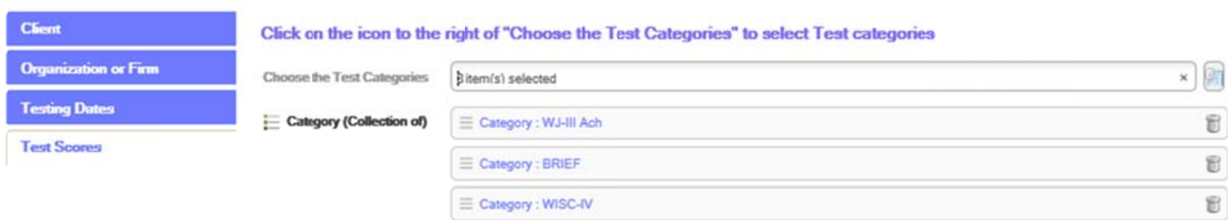


19. The following dialog appears allowing you to select the Test categories:

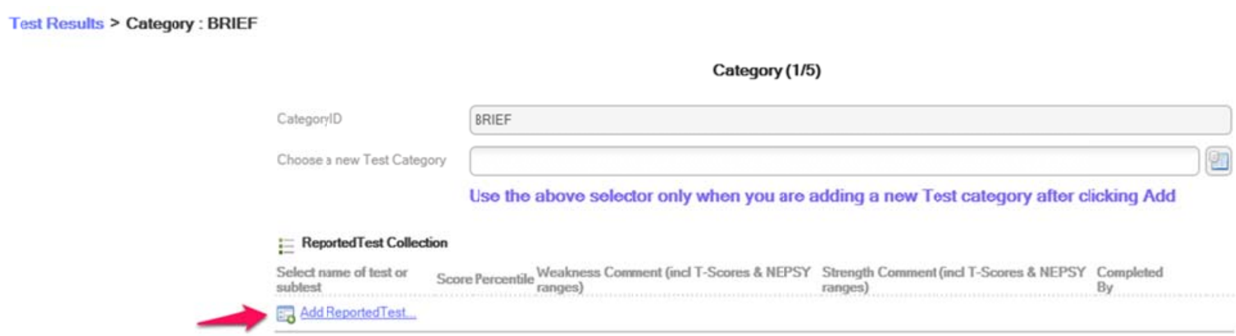


NOTE: after you have clicked the desired tests, you MUST click on the "Add selected rows to interview" button. The Save Data button near the bottom of the screen saves interview data that has been entered but you also have to click on "Add selected rows to interview" in order to continue with the next steps for entering test scores.

20. Check as many checkboxes as are applicable. The message in bold text explains which categories to select for **WISC-IV** and **D-KEFS** tests: For the **WISC-IV Integrated** tests, you should click on the **WISC-IV** checkbox and you will be able to select the Integrated tests within the **WISC-IV** table by using the tests starting with "Int" in the dropdown. Since there are over 100 **D-KEFS** subtests, they have been split into two sub-groups **D-KEFS A** which includes Trail Making, Design Fluency and Verbal Fluency; and **D-KEFS B** which includes all other **D-KEFS** tests. When you have chosen the desired categories, click on the link: Add selected rows to interview at the bottom or top of the page. This will add the selected tests and return to the main interview which now looks like this (in this example, we have only selected 3 categories for illustration purposes; typically you will select several more):

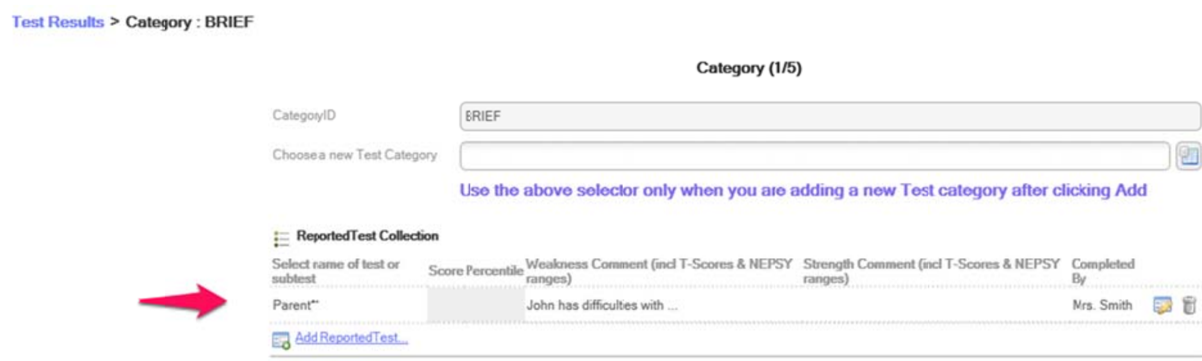


21. Notice that the row beside the Choose the Categories prompt says "**3 item(s) selected**" in this case. It will display how many checkboxes you've checked off. The next step will be to select each Category and enter one or more rows of information in a grid. First we will select the BRIEF category by clicking on the Category: BRIEF link and the following table appears:



You should ignore the box that appears near the top with the prompt "Choose a new Test Categories". You should already have selected the test categories using steps 14 and 15 described above.

22. Click on the **Add ReportedTest** link to add a new blank row to the table. The example below shows a newly added row. In the case of the BRIEF test, the Score and Percentile columns are irrelevant so they are grayed out. The Completed By column is relevant and has been completed.



23. You can enter as many rows as you want in the table (in the above example, the test could have been completed by both parents in which case, you would enter a row for each parent).
24. For Tests like **D-KEFS**, there are many more subtests to select from. For **D-KEFS** tests, the **Score** and **Percentile** columns will be relevant and the **Completed By** column is grayed. The **Strength Comment** and **Weakness Comment** columns are optional. Another feature of the **D-KEFS** tests as with most tests where the **Score** and **Percentile** columns are relevant is that if you enter the **Score** (whether it be standard, scaled or Z score), it will auto-complete the **Percentile**. So in the following screen shot the value 11 was entered in score, resulting in the value 63 automatically going into the Percentile column:

Tip: If you select a subtest and the cursor skips past the Score column either tab backwards to the Score column (using Shift-Tab) or click in the Score column to enter the score, then tab to the Percentile column to let the system calculate the Percentile from the Score that you entered.

25. After you have entered the relevant rows for a test category, click on the link near the bottom of the page called "**Confirm**". **(Do not use the option called "Confirm and Next".)**

26. You will be returned to the interview with the Test Scores tab selected. You can repeat steps 16-20 for each additional Category that was selected in Steps 14-15.

TIP: If you have entered some, but not all, test scores and you are interrupted or need to come back later, we recommend that you click on the **Save Data and Exit** button near the bottom of the page. This will save all answers and close the interview.

27. Here are some notes about entering data in the table:
    a. The first column is a dropdown list. You can select a value either by typing the first few characters of an option or by clicking on the down arrow to the right of the field. ***Tip: You can type one or two characters of an option in the list and then use the down arrow key to scroll to the option you want. When typing characters in the search, use all lower case letters. You can enter spaces in the search but not special characters such as dashes.***
    b. Here are some additional keys you can use while selecting choices from dropdown lists:
        i. ***ESC key*** – will hide the list and not select an item – cancel functionality
        ii. ***Up and down arrow keys*** - these also allow for navigation within the list – for instance you may type "pic" to hone and then move up or down one or two items to select the exact one you want.
        iii. ***Down arrow key*** - will also show the list if it is not showing.
        iv. ***Enter key -*** will do the same as the tab key – select item and hide list.
    c. For **CVLT-C** and **CVLT-II** tests you will enter **Z Score** values that range from -3 to 3. If you enter a fractional value (such as -0.5) you must enter a ***zero or other number in front of the decimal point***; otherwise you will get an error message saying that you must enter a number. You should not enter a + sign before positive values, but you still have to enter a zero or other number in front of the decimal place for positive fractional values.
    d. **N-DRT** tests do not use the standard or scaled or Z Score conversions so for **N-DRT** tests you will have to enter both the score and percentile values manually based on what the test report shows.
    e. Some **NEPSY** tests use a standard or scaled score and in those cases, the Score and Percentile columns are visible (not grayed). Other **NEPSY** tests use ranges for scores and percentiles in which case the Score and Percentile columns will be grayed out and you will have to enter the ranges in the Weakness and/or Strength columns, as the case may be.
    f. You can optionally enter (or *dictate* using your dictation software -- it may take a second or two seconds for the cursor to activate if you are dictating) a **Weakness Comment** or **Strength Comment** in the appropriate column. Remember, clients that we see are more than just their numbers! So, this option gives you flexibility to add in qualitative comments. For instance, if your client got a strong score on a writing sample test but his handwriting was terrible, you could qualify that score by augmenting it with a statement about illegibility.
    g. For some tests, such as those using T-scores or base rates, you should enter any scoring information as part of the Weakness Comment or Strength Comment rather than in the score or percentile columns. For example, see the screen shot below (in the example below, the user has decided to manually enter the T-Scores in brackets, but that is optional and is a personal preference):

	ATTENTION SPAN	Lowest Extreme	Borderline	Low Average	AVERAGE	High Average	Superior	Very Superior
	General Attention Span							
Conners' 3rd Edition Parent **	This questionnaire, which is completed by a parent, surveys various attentonal components. It is discussed in more detail in the report (Mrs. Smith).	Inattention; minor learning problems; executive functioning (T=71/61/64)				Neither hyperactive/impulsive; compliant; peers		
Conners' 3rd Edition Parent **	This questionnaire, which is completed by a parent, surveys various attentonal components. It is discussed in more detail in the report (Mrs. Jones).	Inattention; learning; executive functioning; mild defiance; mild peers (T=65/73/73/60/62)				Neither hyperactive/impulsive		

h. For Base Rate differences that are significant (i.e., less than 15% or an even greater split), these can be recorded in the Weakness column as a comment. Base Rates are also available on the Test dropdown menu (e.g., VCI > PRI).

WISC-IV VCI > PRI	Base Rate: The difference between the Verbal Comprehension Index and Perceptual Reasoning Index is measured. Wide discrepancies(i.e., those that occur in less than 10% of the population) make it particularly hard for participants to coordinate their abilities.	Base rate = 0.1%		

i. The software also takes into account observational scores such as commission errors on the **WRAML-2**. However, these, too, should be entered as comments in the Strengths or Weaknesses columns.

j. The **Completed By** column is grayed out except in cases where you are entering tests that have been completed by a parent, teacher or informant. You should enter the name of the person who completed the test.

k. You can select and enter test rows in any order that you wish. They will be sorted into an appropriate order in the Appendix document.

l. You can select the same test more than once (e.g., if the same test was administered to more than one parent or teacher of it was administered to the client more than once)

m. You can enter as many rows in the table as you like.

n. Even for a single test such as **CPT-II**, you still need to select an option from the Test Name dropdown (i.e., don't leave it blank).

o. The system will also plot scores and comments into relevant columns in the output document.

p. If you want more space to enter test information you can click on the detail icon to the right of any row ( ). A screen like this will appear showing the row information in a dialog view:

In this view, fields that are not relevant to the type of test you are completing are not displayed. If you use this option you will need to click on the link for the test category to return to the table view.

q. You can delete a row by clicking on the trashcan icon to right of the row ( ).

28. When you have entered all test score results, at the bottom of the interview (you may need to scroll down), click on the Save Data And Exit icon that appears near the bottom right of the interview page.

29. You should now see the **Home Page**. The interview information has been saved and the client should still be selected. To assemble the output documents, click on the **Assemble Document** button: 

30. When the system is finished assembling, two links will appear:

    a. **Chart of Test Scores Entered**: this document summarizes the data that was entered. This can be used to verify that you have entered the correct information but you may not need to download or save this document.
    b. **Appendix of Test Score Results**: this document sorts and plots the information into a format that can be attached to the assessment report.
31. You can click on the links to open either or both of the documents that were assembled. A message may appear near the bottom of your browser giving you the option to open or download the file (this may depend on what browser you are using. Internet Explorer and Chrome may display a button to open the downloaded document. Users of Safari may not see a button, but the document will appear in your Downloads folder so you may need to look for it there. If you select to open the file it will be displayed in the word processor that is specified for opening docx files on your computer (Microsoft Word is recommended for highest fidelity particularly for Appendix of Test Results).

    Note: when you review the assembled document in Word, some items will be sorted in multiple categories (e.g., Working Memory and Attention). You can always choose the best fit and delete the row you don't need, or keep both rows or move a row to another area. The whole document is fully editable at this point using Microsoft Word.

    In the output document, any composite scores (e.g., Verbal Comprehension Index) are displayed in bold and any tests which the composite score is based on, if relevant, are grouped below the composite score. WISC-IV Integrated tests are displayed in blue text and are grouped below the related WISC-IV test if both are included in the report.

    Here are a couple of common edits that you might perform:
    To delete a row from the table:
    Position your cursor in the margin to the left of a row and right-click. Select the **Delete Rows** option from the Right-Click menu.

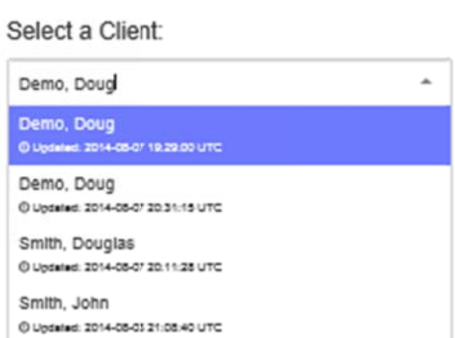
To merge some cells in a row in a table
Sometimes you will want to add a comment in an area (e.g. Weakness or Strength columns) but the columns are currently split into 3 on either the left side or right side of the table. To add a comment where there are currently 3 columns, position your cursor in the first cell that you want to merge. Hold down the SHIFT key and click anywhere in the last cell that you want to merge. Right-click in the selected cells and select the option **Merge Cells**. The separate cells will be merged into a single cell and any contents of the previous cells will also be merged to become the content of the new cell.

32. You should save the edited version of any Microsoft Word document on your computer in any folder that you choose (you can regenerate the original unedited version from the InsightFill website but it will not contain any edits that you have made to assembled document in Word). **TIP:** ***You should develop a convention about how and where you save and name your documents so that you can easily find the version that you have edited after downloading it from the InsightFill website. We recommend creating a main folder on your computer or on a shared folder (e.g. Reports). Then, create a subfolder for each client (e.g. Smith, John). After you assemble and open each document for a given client, use the Save As feature in Word to select the appropriate folder and give the file a meaningful name. You can store the Appendix of Test Score Results, Observations and Report documents in the same client folder so that you can easily locate and reopen a file at any time. If you organize the files as described above, you can go to the top level Reports folder and use the Search feature on your computer to search for files in any of the subfolders.***

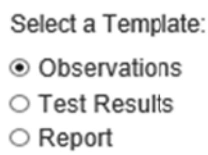
Running the Observations Template

The Observations template allows you to record observations of the client. To run this template:

1. If you are not on the Home Page, click on the **Home** button in the navigation menu.
2. Select a client from the **Select a Client** dropdown list or click on **Add Client** to create a new client.

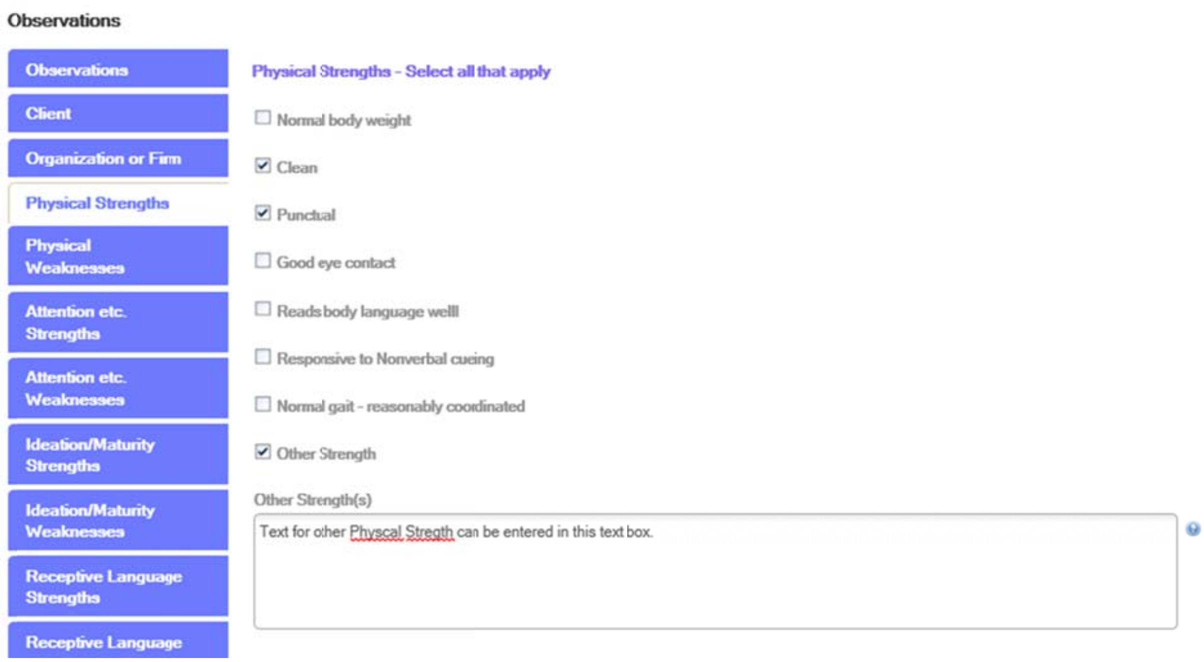


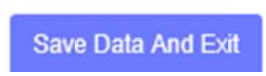
3. Select Observations from the **Select a Template** radio button list:



4. Click on the  button.
5. The Observations interview has several tabs arranged vertically on the left side of the page. You can click on any tab to go to it, or you can use the **Next** or **Back** buttons to progress through the interview one page at a time.

6. For tabs starting with the **Physical Strengths** tab, there are a series of checkboxes that allow you to record the observations. Some of the checkboxes (such as "Other") may prompt you for additional information.



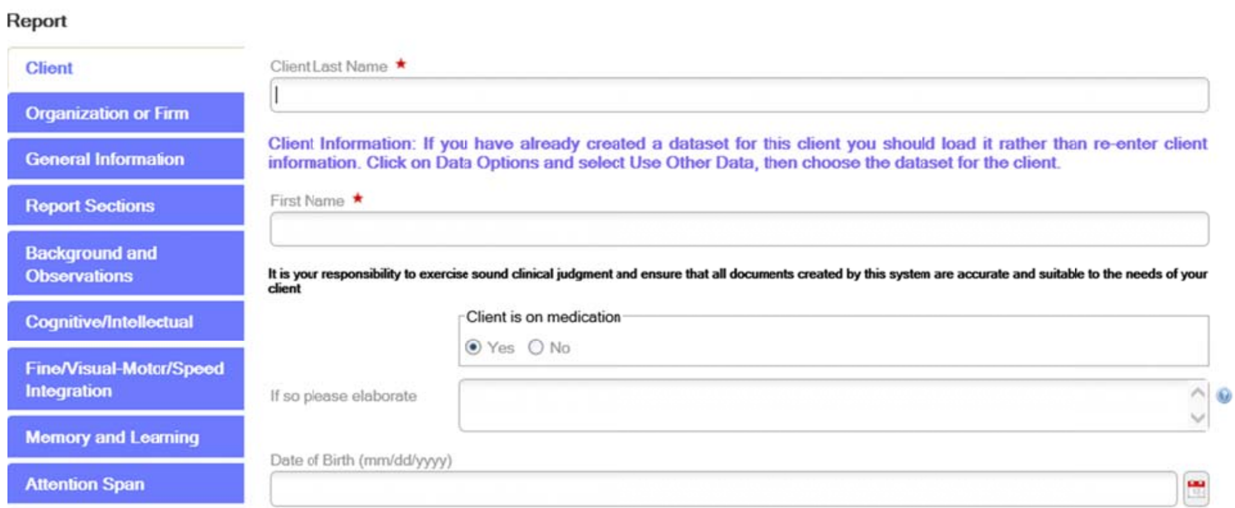
7. After entering information on the various tabs, click on the  button near the bottom of the screen.

8. Click on the  button on the **Home Page**.
9. You can click on the link to open the document that was assembled. A message may appear near the bottom of your browser giving you the option to open or download the file. If you select to Open the file it will appear in your word processor (Microsoft Word, typically).
10. Click on the Explorer icon at the top right of the page to return to the default view. The **Favourite Folders** area should now be visible at the bottom left of the page.

Running the Report Template

The Report template allows you to generate the assessment report. We recommend running this template **after** you have run the Test Results template because some of the information that has been entered while running that template will automatically populate sections of the Report. To run the Report template:

1. If you are not already in the **User Templates** folder, click on the **User Templates** link in the **Favourite Folders** area.
2. Click on the **Report.xdtpx** template in the **User Templates** folder. The Report interview is displayed.

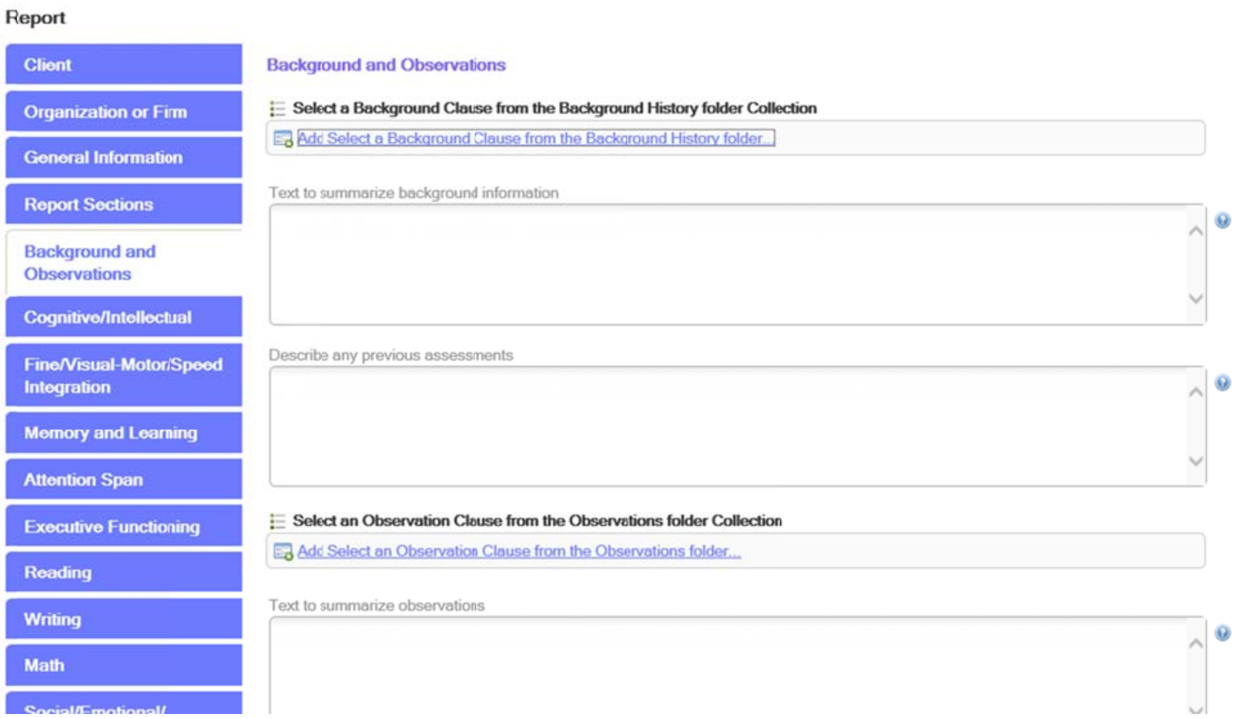


3. If you have previously entered information for the same client, you should load the information for that client. To load existing client data, hover over the **Data Options** button near the top left of the page and select **Use Other Data**. Locate the dataset for the client you want and select it. The information for that client will be loaded into the interview.
   TIP: You can tell whether the information has been loaded for a client by clicking on the Client tab. If the client's first name and last name fields are blank, then it means that you have not loaded the existing client data. The asterisks beside the last name and first name fields mean that those two fields must be filled in before you can assemble a document. If the first and last name fields are filled in, it means that you have already loaded the information or you have typed in values.
4. The Report interview has several tabs arranged vertically on the left side of the page. The tabs relate to the various sections of the Report. You can click on any tab to go to it, or you can use the **Next** or **Back** buttons to progress or back in the interview one page at a time.
5. The **Report Sections** tab allows you to choose which sections you want to include in the Report that you are creating. There may be some circumstances where you wish to streamline a Report by eliminating sections that are not relevant, or where the scope of your report is focused on specific areas (such as academic).

By default, all sections of the Report are checked, meaning that you will be asked questions about all of those areas and there will be a section for each area in the assembled document. If a section is not relevant or you wish to skip it, you can uncheck that section. There are two checkboxes, "**Results and Interpretation**" and "**Recommendations**" which, if unchecked will eliminate all Results and Interpretation sections of the Report, or all Recommendations sections, respectively. One of the impacts of unchecking a checkbox is that some tabs will disappear from the list of tabs on the left. In addition, unchecking some checkboxes, such as Recommendations, will remove certain questions that appear on a tab. It's your choice as to how detailed or streamlined your report will be.

There is one checkbox that is not preselected with the label "**Show Functional Implications (Strenghs and Needs) near end of the report in a table**". If you leave this checkbox unchecked, then the functional implications will be displayed within each processing area (showing strengths and needs). If you check this checkbox, then instead of showing functional implications within each processing area they will be displayed in a chart near the end of the report showing Strengths in the left column and Needs in the right column. Whether you select the checkbox will depend on your personal preferences or on how you feel the report should appear for a particular client. We generally recommend that you leave the box unchecked so that functional implications appear within each processing area.

6. On the **Client** tab, make sure that you answer key questions relating to whether the **client is in school** and the **age/grade level** of the client. These fields are used to dynamically construct parts of the report and to filter choices that are available for functional implications and recommendations.
7. The **Background and Observations** tab has 2 or 3 editable text boxes for Background, School History and Observations respectively.



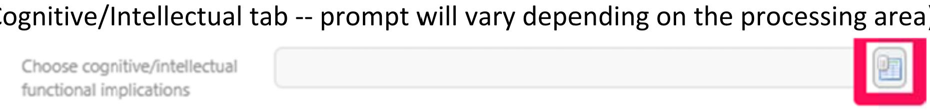
8. You have a couple of options for entering the text for the Background area of the report.
    a. In the "**Text to summarize background information**" textbox you can either type, dictate or paste text. If you are typing text you can also use special key combinations to format the text as you type (hover over or click the question mark box to the right of the field to see your options - these are the same shortcuts that you use in Word for bold, underlining and italics respectively). If you use this approach you can modify the text.
    Tip: The **Text to summarize background information** text box is one of many text edit areas in the Report interview that allow you to enter multiline text. Notice that there is a question mark icon to the right of the text box, which, if clicked, gives an explanation as to how you can enter text that is bolded, underlined or in italics. If you want to enter some bold text in a paragraph you can type CTRL-B (Command-B on a Mac). It doesn't visually bold the text that you will enter but it puts in some special characters that will cause the text to be bolded in the assembled document. When you click CTRL-B it inserts the following text at the cursor: *[]*. You then need to click between the two square brackets and type the text that you wish to be bolded. For example, if you want the word "definitely" to be bolded in the sentence: "You should definitely do this.", then

you should type CTRL-B where the word definitely would appear and then type "definitely" between the square brackets, like this:
You should *[definitely]* do this.
In the assembled document it will appear as:
You should **definitely** do this.
Similarly, CTRL-I (Command-I on the Mac) inserts /[]/ into the text box, and CTRL-U inserts -[]-. You would place your cursor between the square brackets and type the text to be italicized or underlined.
For example
You should /[definitely]/ do this.
would appear in the assembled document as
You should *definitely* do this.

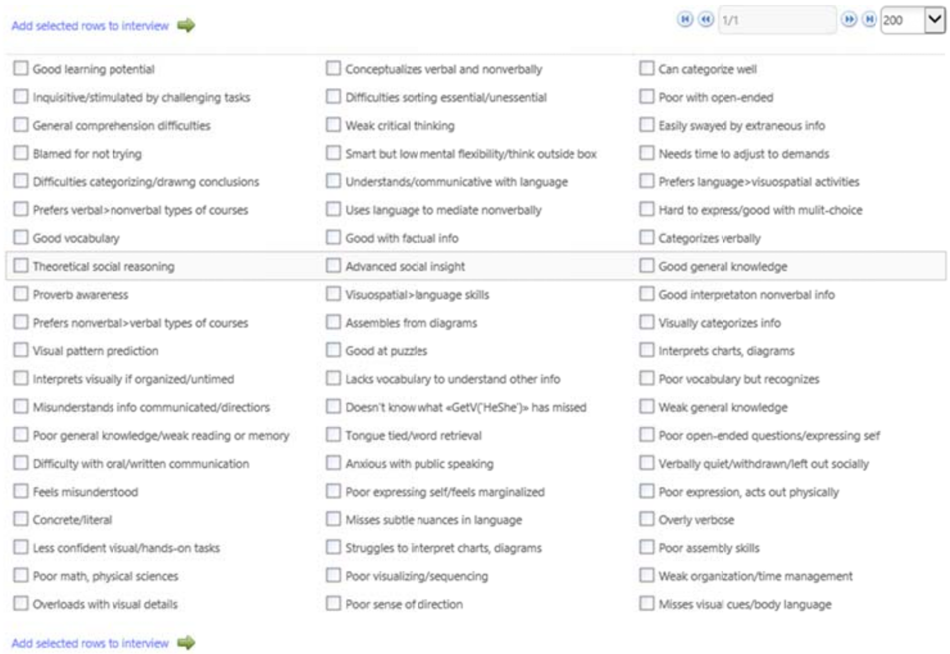
and
You should -[definitely]- do this.
would appear in the assembled document as
You should <u>definitely</u> do this.

Note that you can't combine bold, underlining and italics. Only one formatting type can be applied to any portion of text.

9. You can complete the sections about School History (if applicable) and Observations in a manner similar to what is described for Background History in step 7.
10. There are tabs for each of the following processing areas: **Cognitive/Intellectual**, **Fine/Visual-Motor/Speed Integration**, **Memory and Learning**, **Attention Span**, **Executive Functioning**, **Reading**, **Writing**, **Math**, and **Social/Emotional/Behavioral**. For each of these tabs, you will have the opportunity to:
    a. Dictate, type or paste in text to discuss the results of testing in that processing area.
    b. Select from an array of functional implications for the client in that area. To choose functional implications,
        i. Click on the icon to the right of the box with the prompt: "Choose Cognitive/Intellectual functional implications" (in the case of Cognitive/Intellectual tab -- prompt will vary depending on the processing area):

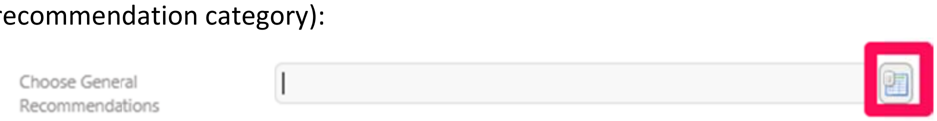


        ii. Select the functional implications that you want to use in the report. Each checkbox chooses one paragraph or bullet point that will be included in the report. The captions that you see beside each checkbox are short-form descriptions of longer text that will be inserted into the report. The checkboxes are organized from strengths near the top to weaknesses near the bottom.

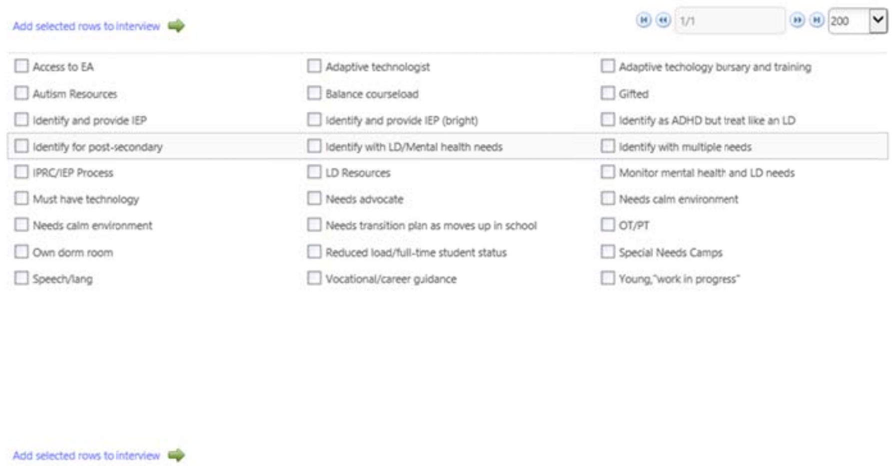


iii. Click on the "**Add selected rows to interview**" link that appears above or below the list of checkboxes. You will be returned to the tab for the current processing area. **Tip: Even though it does not show what options you have selected, the text will show you how many items have been selected. The software remembers what choices you have made and the selected paragraphs will appear in the output document.**

11. You can repeat the above steps for each of the Results and Interpretation areas.
12. On the **Summary and Formulation** tab you can:
    a. Type, dictate or paste text into the textbox with the label "Summary and Formulation"
    b. Select custom clauses from the Summary and Formulation folder using the same technique as described in paragraph 7(b).
13. Click on the **Recommendations** tab. You can enter or select recommendations in several different categories: General, Personal Development, Cognitive, Attention/Retention, Executive Skills, Reading, Writing/Fine-motor, Math and Test-taking. For each category of recommendation you can:
    a. Type, dictate or paste your own recommendation
    b. Select from a list of possible recommendations (there are more than 250 pre-defined recommendations that you can choose using checkboxes**)**. To select recommendations within the category:
        i. Click on the icon to the right of the box with the prompt: "Choose General recommendations" (in the case of General -- prompt will vary depending on the recommendation category):



ii. Select the recommendations that you want to use in the report. Each checkbox chooses one numbered paragraph that will be included in the report. The captions that you see beside each checkbox are short-form descriptions of longer text that will be inserted into the report.



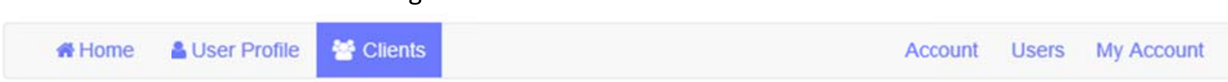
iii. Click on the "**Add selected rows to interview**" link that appears above or below the list of checkboxes. You will be returned to the tab for the current processing area. Tip: When you have made some selections and return to the Recommendations tab, you will see the number of recommendations that you have selected in the area after the prompt (e.g. 6 item(s) selected). The software remembers what choices you have made and the selected paragraphs will appear in the output document.

14. When the system is finished assembling, a link will appear in the right pane for a file called, for example, **Smith - James Report.docx** (there may be a number before docx which will vary depending on how many documents have been assembled with the same client).
15. You can click on the link to open the document that was assembled. A message may appear near the bottom of your browser giving you the option to open or download the file. If you select to Open the file it will appear in your word processor (Microsoft Word, typically).
16. Click on the **Explorer** icon at the top right of the page to return to the default view. The **Favourite Folders** area should now be visible at the bottom left of the page.

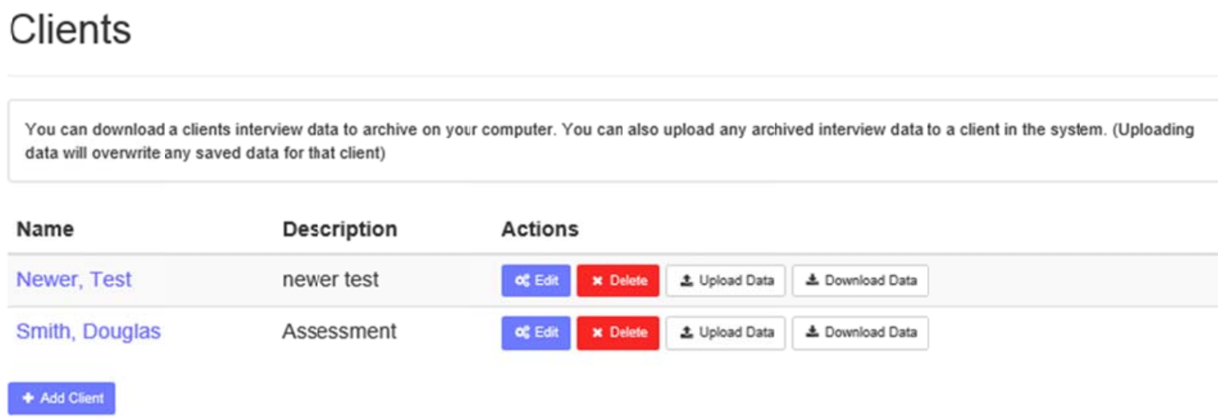
Managing Your Client Data

Each time you create a new client a new client dataset is created that stores information about the client. That client dataset can be selected whenever you want to input/edit information or assemble a document. Over time, you will accumulate a number of client datasets and you should either backup and/or delete those client datasets from the InsightFill server after you have entered information or prepared reports. To do this:

1. Click on the Clients tab in the Navigation menu.



2. The list of clients will appear:



3. On the Client page you can perform a number of functions:

- 

If you want to change the name or description for the client, click on the **Edit** button. That will allow you to change the First Name, Last Name and Description fields for the selected client.
- 

If you want to delete the client, click the **Delete** button. **We strongly recommend that before you delete a client, you should first click on the Download Data button and save the client information to your local computer. That way, you will be able to upload the data later on if you need it.**
- 

If you have entered a substantial amount of data for a client, you can create a backup of that data by clicking on the **Download Data** button. Your computer may automatically store these files in the Downloads folder on your computer in which case you may wish to move them to another folder so you can keep track of them. We recommend that you create a folder on your computer or local file server called **Client Datasets** where you can save these client datasets. This will allow you to more easily find them later on.
- 

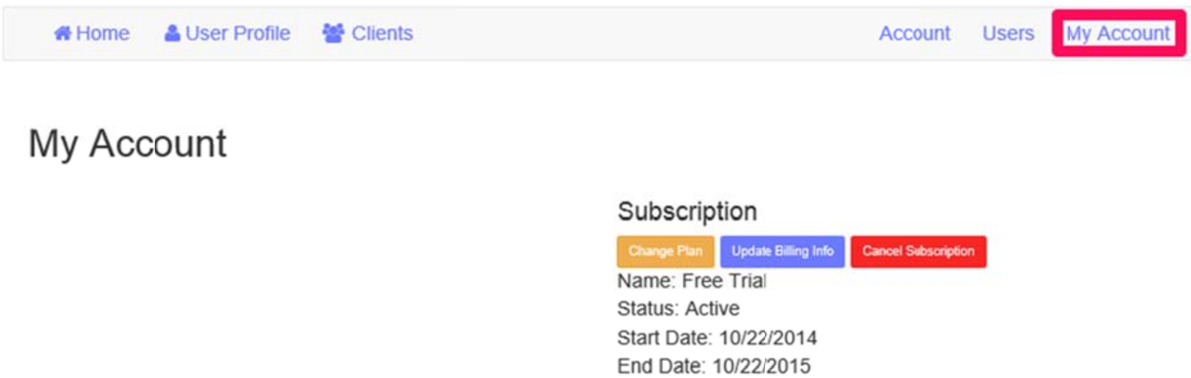
If you want to upload a client dataset that you backed up previously, you can click on the **Upload Data** button. Before you click on this button you may need to add a client using the **Add Client** button. You will be prompted to select a client dataset file to upload and you may need to navigate to a folder where you have previously saved client datasets (the files will typically end in the words: "clientdata.xml" and the first part of the file name will be the client's name).
- 

If you want to add a new client to the list of clients you can click on the **Add Client** button near the bottom of the page: . You will be prompted for the First Name, Last Name and Description for that client. Click on the **Save** button to store the information for that client.

Free Trials and Subscriptions

When you initially sign up you will be provided with a free trial period of 30 days. If you have any difficulty using your free trial please contact us at insightfill.com.

To confirm the status of your free trial or subscription at any time, click on the **My Account** option in the navigation bar.



If you are still on a free trial, the name of the subscription will be "Free Trial". If the free trial period has not expired, your status will be shown as "Active". If the free trial period has ended, the status will be shown as "Expired".

Once the free trial has expired you will have a choice of two types of subscriptions:

Monthly: A monthly subscription starts from the day that you subscribe and ends one month later. You will be asked for your credit card information. The credit card information will be stored and your credit card will automatically be billed at the end of each monthly period unless you click on the Cancel Subscription button on the My Account page. The current standard rate for a monthly subscription is $20 per user per month. This is an introductory rate which is 50% off the rate that will be charged after we have been operating the site for approximately one year. Discounts are available for students and for multiple users on the same account. Please contact us for more information on discounts.

Yearly: A yearly subscription starts from the day that you subscribe and ends one year later. You will be asked for your credit card information. The credit card information will be stored and your credit card will automatically be billed at the end of each yearly period unless you click on the Cancel Subscription button on the My Account page at any time before the expiry date of your current subscription. Yearly subscriptions are currently $180 per user per year -- this equates to a savings of 3 months per year! Discounts are available for students and multiple users on the same account. Please contact us for more information on discounts.

There are 3 buttons on the My Account page:

This button allows you to select a plan or change a current plan to another type. You will be asked to choose from one of the plan types described above (Monthly or Yearly). Select an option and click on the **Get Started Now** button to subscribe to a plan.

Choose this option if you want to update your credit card information that is used when your monthly or yearly plan is renewed. You may need to do this if your credit card date has expired or if you wish to transfer payment to another card.

If you want to cancel your subscription at any time, click on this button. This will prevent the system from automatically billing your credit card on the next renewal date. **Note that if you click this button and there is still time remaining on your subscription you will still be able to continue using the system until your expiry date has passed.**