

How to Order Your First Assessment

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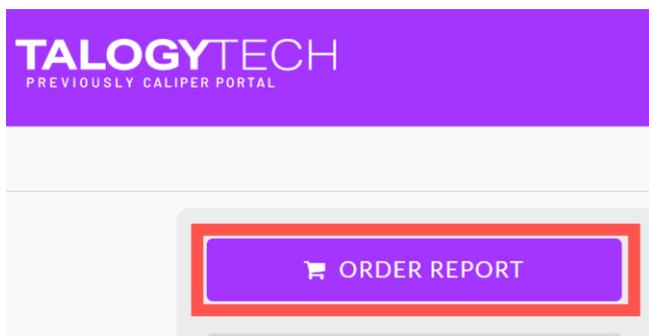
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The Client Portal will be your main tool to use when ordering Caliper Profile assessments and reviewing results. This article will prepare you to successfully order a report for your assessee.

Step 1: Ordering reports and assessments

First, sign into the Caliper Portal (<https://portal.calipercorp.com>). This will bring you to the **Dashboard** page.

Click on the **Order Report** button in the upper left of the Dashboard.



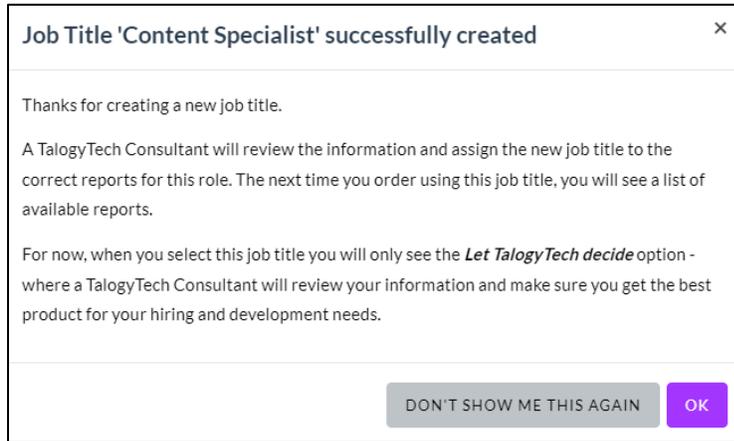
The **Order Reports/Assessments** screen will appear.

Step 2: Creating a new job title

Click **New** to the right of the **Job Title** field. The New Job Title dialog appears.

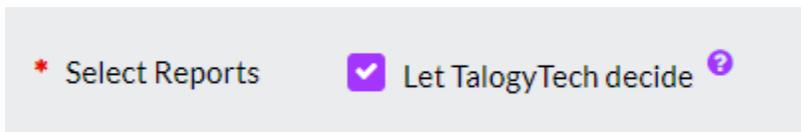
Once you are done with the description, Click **Save**.

The **Job Title successfully created** screen should appear. Then Click **OK**.



Selecting Reports

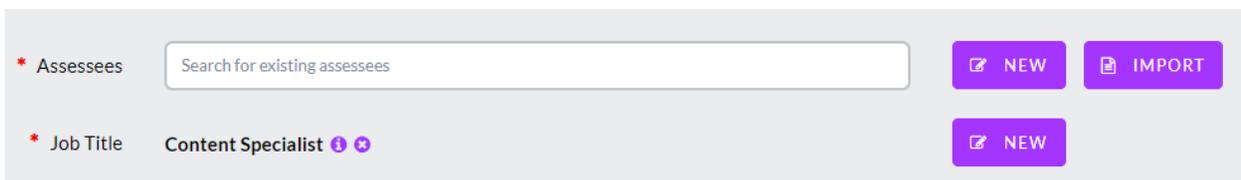
When establishing a new Job Title, under **Select Reports**, you will see only the option to **Let TalogyTech decide**, which is our recommended best practice. With Let TalogyTech decide, a Talogy Account Consultant will review your job title and description and determine the best report option for this specific role. The next time you select this job title, you will be able to order a report right away.



Step 3. Entering a new assessee

If an assessee has never completed a Caliper Profile assessment, that person has no information in our system, and you must follow these steps:

Click **New** next to the **Assessee** field.



The **New Assessee** dialog shows.

Enter the new assessee's **First Name**, **Last Name**, and **Email Address**.

The screenshot shows a 'New Assessee' dialog box with the following elements:

- Current Employee:** Radio buttons for 'Yes' (selected) and 'No'.
- Assessment Purpose:** Radio buttons for 'Development' (selected) and 'Selection'.
- Required Fields:** Three text input fields for 'First Name', 'Last Name', and 'Email address of the individual taking the assessment', each marked with a red asterisk.
- Language:** A dropdown menu currently set to 'English - US'.
- Optional Fields:** Four text input fields: 'Message to TalogyTech Consultant about this order', 'P.O. Number **', 'Cost Center **', and 'Personalized message to assessee'.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom.
- Callouts:**
 - Red box: 'Is the assessee a current employee of your company?' pointing to the 'Yes' radio button.
 - Red box: 'If "Yes" to first question, let us know whether this is going to be for development or selection.' pointing to the 'Development' radio button.
 - Red box: 'Use this drop-down to provide the assessment in a different language.' pointing to the language dropdown.
 - Red box: 'The non-required fields allow you to set a purchase order number or cost center, write a note to your Caliper Consultant, and even send a personalized message to the assessee.' pointing to the optional fields.
- Legend:**
 - * Indicates required field
 - ** This information will appear on your invoice

Click **Save**. The **Order Reports/Assessments** screen reappears, with the name of the new assessee in the Assessee's field.

Step 4. Optional areas

The screenshot shows a configuration panel with the following elements:

- Proctored Assessment** (with a help icon):
 - Proctored Assessment
 - Send Email to Me
 - Send Email to:
- Expires in (days)** (with a help icon):
- Tags** (with a help icon): None
- EDIT** button (with a pencil icon)

Callout boxes provide additional information:

- A box pointing to the "Send Email to:" field contains the text: "Send the assessment link to yourself (the primary contact) or to a specified email address."
- A box pointing to the "Expires in (days)" field contains the text: "Specify an expiration date for assessment link (default is 90 days)"
- A box pointing to the "EDIT" button contains the text: "Proactively assign an assessee to a tag. This is used for filtering reports in the Dashboard tab."

If **Expires in (days)** field is left blank the assessment will default to 90 days. The maximum number of days until expiration is also 90 days.

Step 5. Placing the order

To place the order, perform the following:

1. Make certain all required fields on the **Order Reports** screen are filled in.
2. Click **Place Order**. The **Report/Assessment Successfully Ordered** dialog appears, allowing you to review everything that you have entered.

Report/Assessment Successfully Ordered ✕

Job Title - Content Specialist

Default Report: -
Job Description: Description Here

Assessee - Danielle Smith

Email: DanielleSmith@talogy.com
Language: English - US
P.O. Number: -
Employee ID: 00000
-
-
-
-
-
-
Score Source: A new assessment is required.
Message to TalogyTech Consultant about this order: -
Personalized message to assessee: -

Selected Reports

Let TalogyTech decide

Tags

Primary Contact - Danielle Varanyak

Job Title: Cust. Relations
Email: danielle.varanyak@psionline.com
Phone: +1 (609) 524-1200

OK

Step 6. Review orders and reports

To review your orders/reports, go to your **Reports** tab at the top of your screen.

From there, you can scan your recent reports for the assessee in question, or search—in the appropriate field—by job title or the assessee’s name. Make sure that the **Show Pending Assessments** box is checked, as shown below, to see the assessments that have not yet been completed.

View Reports
[SCHEDULE A CONSULT](#) [ORDER REPORT](#)

Show Pending Assessments
 Hide Not Hired Assessee

Action	Name	Report	Date	Status / Potential
<input type="checkbox"/> ▼	Danielle Smith	Pending - Let TalogyTech Pick Report Content Specialist	5/9/2022	Sending email