ASQ Online *CHEAT SHEET* *for ASQ Online Setup Webinar for Program Administrators*

Website: www.asqonline.com

This sheet is an accompaniment to the ASQ Online Setup Webinar for Program Administrators. Click on a link for access to a video and STEP by STEP instructions for each program setup step.

Steps

Step 1: Enter Keycodes
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Instructions:

1. Click on **Program**
2. Scroll down to **Keycodes** section
3. Click *Add*
4. Enter 16-digit alphanumeric keycode to field
5. Click *Save*. (Repeat if you have multiple questionnaire keycodes.)

Step 2: Create Program Users
WATCH VIDEO

Instructions:

1. Click on **Program**
2. Click *Add Program User*
3. Enter in required information
4. Select whether user should be a Provider or Program Admin, or both by clicking in the box next to the role
5. Click *Save.* User will receive an email from the system with their username and instructions to create a password

Step 3: Add Child Profiles
There are three ways to create Child Profiles and Caregiver Profiles in ASQ Online: **Manually** create Child and Caregiver profiles while logged in as a Program Admin (or Provider), have caregivers use **Family Access** to complete the Child and

Caregiver profile information during the online screening process, or **Import** Child and Caregiver profile data using the import templates within ASQ Online. There are videos and instructions for each of the three options below.

Adding child and caregiver profiles (Manual Entry)
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Instructions:
Adding a child and caregiver profile

1. Click on **Child Profiles**
2. Click *Add Child Profile* from the left **Quick Links** menu
3. Fill in the required fields that are noted with an asterisk
4. Click *Save*. See below to add a caregiver profile to the child profile.

Adding a caregiver profile to the child profile

1. While on the child profile, click *Add New Caregiver* from the left **Quick Links** menu
2. Fill in the required fields that are noted with an asterisk.
3. Click *Save*.

Note: After adding the child and caregiver profile, you must assign the child profile to a provider user. Click here to go to Assigning child profiles and providers.

Adding child and caregiver profiles (Family Access)
WATCH VIDEO

Instructions: A Program Admin within a program can create a Family Access link for each questionnaire type. The program sends the link out to the parent and the parent clicks on the link and enters their demographic information, the child's demographic information and then completes the screening before submitting the screening back to the program. The program accepts the screening and a child profile is created with the caregiver profile and screening being attached to that child. Through Family Access, the parent does all the data entry. Click the video link below to see how the parent completes the screening through Family Access.

Adding child and caregiver profiles (Import)
WATCH VIDEO

Instructions:

1. Click on **Program**
2. Under left side **Quick Links** menu, click *Import Data*
3. Click *Download Data Templates* tab
4. Click *Child & Caregiver Profile Data* template to download template
5. Click *Requirements for Child and Caregiver Profile Data* link to view the template requirements
6. Fill in the template according to the template requirements
7. From **Import Data** section, click *Import Data*
8. From **Import Type** dropdown menu, select *Child & Caregiver Profile Data*
9. Select date format from **Date Format** dropdown menu
10. Click *Choose File* to select your file

11. Click *Import*
12. Note: After importing the child and caregiver profile, you must assign the child profile to a provider user. Click here to go to [Assigning child profiles and providers](#).

Assigning child profiles and providers
WATCH VIDEO

Instructions:

Assigning a provider to a child profile

1. Click on **Child Profiles**
2. Click on child name link
3. Under left side **Quick Links** menu, click *Add Provider/Reviewer*
4. Click in the checkbox to the left of the Provider who should be assigned to the child profile
5. Click *Add*

Assigning a child profile to a provider

1. Click on **Program**
2. Under left side **Quick Links** menu, click *Search Program Users*
3. Click on the name of the provider you would like to add child profiles to
4. Under left side **Quick Links** menu, click *Assign Children to Provider*
5. Click in the checkbox to the right of the child profile who should be assigned to the provider
6. Click *Add*

Step 4: Setup Classrooms
WATCH VIDEO

Instructions:

Adding Classrooms

1. Click on **Program**
2. Under left-side **Quick Links** menu, click *Classrooms*
3. Click *Add Classroom*
4. Enter in name of classroom and click *Save*
5. Repeat steps 1-4 for additional classrooms

Assigning children to classrooms

1. Click on **Program**
2. Click *Classrooms*
3. Click on classroom name
4. Click *Assign/Unassign Children*
5. Click in the checkbox to the right of each child profile to add to the classroom
6. Click *Save*
7. Repeat steps 3-6 to assign children to other classrooms

Step 5: Customize Child Profile Requirements
WATCH VIDEO

Instructions:

1. Click on **Program**
2. Scroll down until you see the **Child Profile Required Fields** section
3. Click *Edit*
4. Click in the **Required and Family Access Required** boxes to the left of **Ethnicity** and **County/District**
5. Scroll down and click *Save*
6. These fields will not be marked required in the child profile and within Family Access for parent completion.

Step 6: Setup Family Access

Step 6A: Setting up the URL
WATCH VIDEO

Instructions:

1. Click on **Family Access**
2. Click Edit next to the Family Access URL you would like to edit/update
3. All required information is available by default. Add/edit any content in the fields by typing in the fields

NOTE: Do not make any edits to the Consent field unless instructed to do so by the Account Administrator

4. To provide the option for parents to download a PDF of Intervention Activities that match the screening interval they completed for the child, select the activities packet from the **Thank you page packet dropdown** menu in the **Thank you message** section
5. To make the Family Access URL enabled, be sure to uncheck the box to the left of Disabled
6. To add a logo, upload the logo from your desktop folder
7. Click *Update*
8. You will be taken back to Family Access page. To make additional edits to the Family Access URLs content, click *Edit* to the right of the URL

Step 6B: Family Access Invitation Letter
WATCH VIDEO

Instructions:

1. Click on **Family Access**
2. Click *Edit* to the right of the Family Access URL
3. Click **Edit Invitation Letter** on left side under **Quick Links**
4. Make any edits and then click *Save Changes* to preview the letter
5. Click **Landing Pages** on left side under **Quick Links** to return to **Family Access**

Step 6C: Caregiver Screening Completion
WATCH VIDEO

Instructions: A Program Admin within a program can create a Family Access link for each questionnaire type. The program sends the link out to the parent and the parent clicks on the link and enters their demographic information, the child's demographic information and then completes the screening before submitting the screening back to the program. The program accepts the screening, and a child profile is created with the caregiver profile and screening being attached to that child. Through Family Access, the parent does all the data entry. Click the video link below to see how the parent completes the screening through Family Access.

Step 6D: Accepting Family Access Screenings

Instructions:

1. Log in as Program Admin
2. Click on **Family Access**
3. Click on *There are x family access screenings to approve (or reject)* link
4. Click the Review link to the left of the child's name to review acceptance options.
5. Click:
   a. **Accept and attach to an existing child profile**: Type in the child's name and/or DOB to see if child already exists in program. If the child's name does exist, click on that child's name in the dropdown menu
   b. **Accept as a new child profile an assign to provider**: If the child doesn't exist, click on the provider dropdown menu and select the provider who will be assigned to this child
   c. **Accept as a new child profile without assigning to a provider**: If the child doesn't exist, and you need to view the completed screening before determining which provider to assign this child to, then select this option. You will be able to assign the child to a provider later
   d. **Reject entirely**: Select this option if the screening was entered into your program in error. Selecting this option will remove the screening and it will be unable to be retrieved later
6. Click *Process*
7. The child profile will appear in the **Child Profiles** section with the screening and the screening will also appear within **Screening Management** under the **Screenings** tab

Step 6E: Reviewing Results with Families

Instructions:

1. Click on **Screening Management**
2. Next to **Screenings** tab, click *View All* tab
3. Use **Screening Search** area to search for screening, or find screening from screening list
4. Click on questionnaire name link
5. Information Summary Sheet will appear with results for review