



**ASSESSMENT SOFTWARE
USER GUIDE**



BE WELL LEAD WELL PULSE® ASSESSMENT SOFTWARE USER GUIDE

This user guide outlines how to utilize the Be Well Lead Well Pulse® assessment software, including how to send assessments, access feedback reports, and use security guidelines to protect the confidentiality of everyone who utilizes the assessment.

The assessment software can be accessed at: www.bewellleadwellpulse.com

To purchase assessments and group reports visit: www.bewellleadwell.com/shop

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Getting Started

As a Be Well Lead Well Pulse® Certified Guide, you can do the following within the assessment system software:

1. Set up participants to take a Be Well Lead Well Pulse® assessment.
2. Add a project (if desired) and put participants into that project.
3. View the list of assessments completed by participants linked with your account.
4. Download assessment feedback reports (in a PDF format).

HOW TO LOG IN

1. Visit www.bewellleadwellpulse.com.
2. Select "Guide Access" in the top, right-hand corner.
3. Enter your email address and password.

The first time you access your account, you will receive an email with a temporary password which you will be prompted to change. If you forget your password, select the appropriate link on the login page to reset it.

Passwords must be at least 8 characters and include at least 3 of the following: upper case, lower case, numeral, or special character.

KEY TERMS TO KNOW

Participant: The individual taking the assessment.

Project: The group of which the participant is part.

Survey: The Be Well Lead Well Pulse® assessment

Guide: The Certified Guide who is qualified to administer the assessment.

Control Panel: The home page of the Be Well Lead Well Pulse® software (only available to Certified Guides).

The screenshot shows the login interface for Be Well Lead Well Pulse. At the top left is the logo, and at the top right are links for "Log in" and "Guide Access". The main heading reads "Welcome, Guide. Please log in to continue." Below this is the large logo with "BeWellLeadWell®" in blue and "pulse" in green script. The login form includes an "Email" field with the text "kate@wisdom-works.com", a "Password" field with masked characters, a "Remember me?" checkbox, a "Log in" button, and a "Forgot your password?" link.

Software Overview

There are several key pages where you can view and edit information pertaining to your Be Well Lead Well Pulse® assessments.

HOME PAGE

The home page, also known as the “Control Panel” is your main access page. From here you can search for participants and projects, see how many assessments and group reports you have in your account, and view recently completed surveys.



To get back to the HOME PAGE at any time, click GUIDE ACCESS on the top, right-hand corner of any page.

Be Well Lead Well Pulse | Hello kate@wisdom-works.com | Log out | Guide Access

Welcome Kate McIver

Participants and Projects

Projects

Search by project name or organization

Search Add Project

Participants

Search by Participant name, email, or organization

Search Add Participant

Number of Assessments You Have Available to Send : 3
Number of Group Reports You Have Available to Download : 1

Recently Completed Surveys

Survey#	Participant	Project this Survey is in	Date Created	Date Started	Date Completed	Report
1	Brock Li	Project A	12/1/2021	12/9/2021	12/9/2021	

Be Well Lead Well Pulse | Hello kate@wisdom-works.com | Log out | Guide Access

Welcome Kate McIver

Participants and Projects

Projects

Search by project name or organization

Search Add Project

Participants

Search by Participant name, email, or organization

Search Add Participant

Number of Assessments You Have Available to Send : 3
Number of Group Reports You Have Available to Download : 2

Search for Projects & Participants using search bars.

For a full list click “Search” without entering search terms.

Add a new Project or Participants via the blue buttons.

Recently Completed Surveys

List of recently completed surveys.

Survey#	Participant	Project this Survey is in	Date Created	Date Started	Date Completed	Report
1	Brock Li	Project A	12/1/2021	12/9/2021	12/9/2021	
1	Pete Moss	Project B	12/1/2021	12/9/2021	12/9/2021	
1	Sarah Tonin	Project A	12/1/2021	12/9/2021	12/9/2021	
2	Sarah Tonin	Project B	12/1/2021	12/9/2021	12/9/2021	
2	Brock Li	Project B	12/1/2021	12/9/2021	12/9/2021	

Click green report icon to download a participants feedback report.

Select Participant or Project to view details.

VIEW PARTICIPANT PAGE

When you create or select a participant, you are shown the “VIEW PARTICIPANT” page, which enables you to view and edit:

Participant Details: Name, Email, and Organization

Project Participants: The projects of which participant is part. (Participants do not have to be part of project for you to send them an assessment. However, putting the participant into a Project is essential if you want to create group reports.) The dropdown bar enables you to add a participant to a project. To remove the participant from a project, click the orange X button.

Surveys: The Be Well Lead Well Pulse® assessments for this specific participant.

The screenshot shows the 'View Participant' page. At the top, there's a header with the logo and user information. Below that, the 'Participant Details' section includes fields for First Name (Brock), Last Name (Li), Email (kate@wisdom-works.com), and Organization (Test). There are 'Save' and 'Delete' buttons. The 'Participant Projects' section has a dropdown to 'Add Participant to a Project' and an 'Add' button. A table lists projects, with 'Project A' from 'Apple' on '2/4/2022'. A red box highlights the text 'Projects this Participant is part of.' The 'Surveys' section has a 'Generate New Survey' button and a table of surveys. A red box highlights the text 'Surveys connected to this participant.' The survey table has columns for Survey#, Project this Survey is in, Date Created, Expiration Date, Auto-Reminder Date, Date Started, Date Completed, Report, Reminder, and Last Reminded. One survey is listed for 'Project A'.

VIEW PROJECT PAGE

Projects are useful for when you are working with multiple participants who are part of an intact group. Projects also enable you to run group reports, which analyzes the assessment data of all participants included within that project.

When you create or select a project, you are shown the “VIEW PROJECT” page, where you can view and edit:

Project Details: Name of the Project and Organization (if desired).

Project Participants: The participants who have been added to this project, along with the organization they may be associated with. You can remove a participant by selecting the orange X button.

Surveys: The Be Well Lead Well Pulse® assessments that are associated with this project. Those listed here will be included within any group reports created for this project, which you can generate using the designated green button. You can also generate new assessments for all participants that are part of this project using the designated blue button.

The screenshot shows the 'View Project' page. At the top, there's a header with the logo and user information. Below that, the 'Project Details' section includes fields for Name (Project A), Organization (Apple), and Date Created (02/04/2022). There are 'Save' and 'Delete' buttons. The 'Project Participants' section has a dropdown to 'Add Membership to a Project' and an 'Add' button. A table lists participants: Brock Li, Pete Moss, and Sarah Tonin, all from 'Test' organization. A red box highlights the text 'Participants that are part of this project.' The 'Surveys' section has a 'Generate Surveys' button and a 'Run Group Report Analysis' button. A red box highlights the text 'Participant surveys connected to this project. These will be included in the group report.' The survey table has columns for Survey#, Participant, Date Created, Date Started, Date Completed, Report, Reminder, and Last Reminded. Three surveys are listed for participants Brock Li, Sarah Tonin, and Pete Moss.

Adding Participants & Projects

Before you trigger an assessment, first add the participant to the software. If the participant is also part of a project, create that project and add the participant to it **before** generating the assessment.



Watch this helpful video for how to add projects and participants:
youtu.be/oPg_hLyXIUo

ADD A NEW PROJECT

Projects are a grouping of participants and specific assessments connected to them.

TO ADD A NEW PROJECT:

1. Access the home page (Control Panel) and click "ADD PROJECT".
2. Enter a name and related organization, if applicable.
3. Click SAVE.

The screenshot shows a search bar for projects with the text "Search by project name or organization" and a green "Search" button. To the right, a red box highlights the "Add Project" button with the text "Click 'Add Project' to create a new project." and a red arrow pointing to the button.

The screenshot shows the "Add New Project" form. It has a "Project Details" section with fields for "Name" (with a sub-label "Enter a Project Name") and "Organization" (with a sub-label "Name of relevant organization, if any"). A green "Save" button is at the bottom left. A red box highlights the "Save" button with the text "Enter Project details and click 'Save'." A "Back to Control Panel" button is at the bottom left.

ADD A NEW PARTICIPANT

Participants are the individuals taking the assessment.

TO ADD A NEW PARTICIPANT:

1. Access the home page (Control Panel) and click "ADD PARTICIPANT".
2. Enter the following information: First Name, Last Name, Email, Email Confirmation, and Organization. (All fields are required except Organization. However, we recommend you always include the Organization.)

The screenshot shows a search bar for participants with the text "Search by Participant name, email, or organization" and a green "Search" button. To the right, a red box highlights the "Add Participant" button with the text "Click 'Add Participant' to create a new participant." and a red arrow pointing to the button.

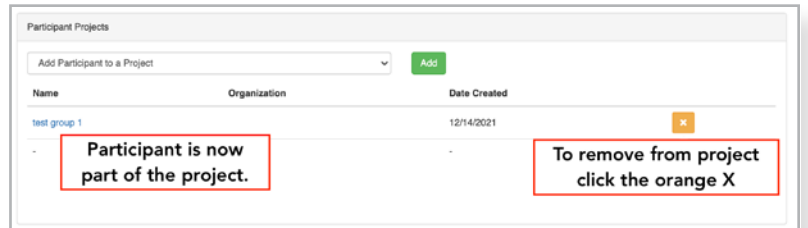
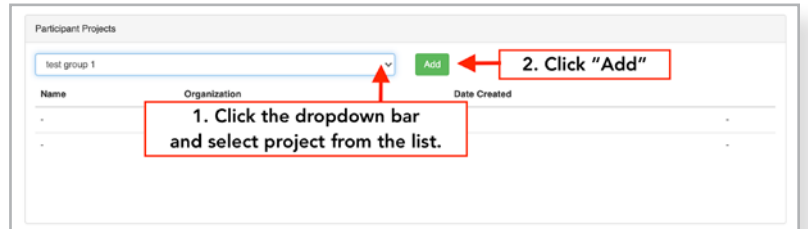
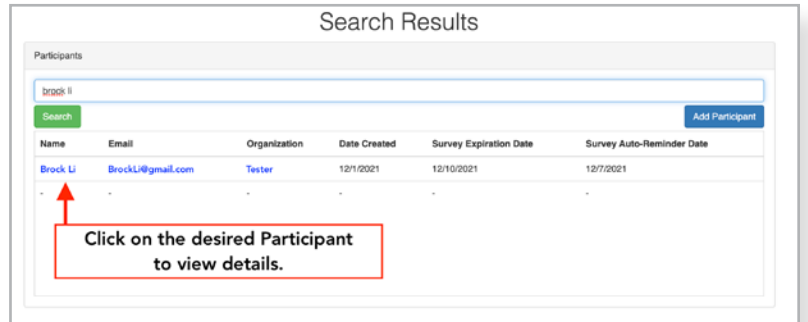
The screenshot shows the "Add New Participant" form. It has a "Participant Details" section with fields for "First Name" (with a sub-label "First Name"), "Last Name" (with a sub-label "Last Name"), "Email" (with a sub-label "Email Address"), and "Confirm Email" (with a sub-label "Confirm Email Address"). There is also an "Organization" field (with a sub-label "Organization or Company"). A green "Save" button is at the bottom left. A red box highlights the "Save" button with the text "Enter Participant details and click 'Save'." A "Back to Control Panel" button is at the bottom left.

3. Click SAVE.

TO ADD PARTICIPANT TO A PROJECT:

(Note: the project must be created before you can add participants.)

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Click on the dropdown menu within the "PARTICIPANT PROJECTS" section and select the project to which you want to add this participant.
4. Click "ADD" when the project name appears in the dropdown bar. You should now see the desired project listed within this section.



Administering Assessments

There are 2 ways to send a unique, personalized link for your participants to complete the Be Well Lead Well Pulse® assessment.

1. You can generate an individual assessment for a specific participant.
2. You can generate an assessment for multiple individuals at the same time that are part of a project.

When you generate an assessment, participants will receive a personalized link and reminder emails from donotreply@bewellleadwellpulse.com. The emails will include the name and email address associated with your Guide account. We recommend that you inform the participant that they will receive the assessment link from that email **before** generating the assessment, so that it doesn't get mistaken for spam.

When the participant completes the assessment, they will receive a confirmation email that their assessment has been received. This email will also let them know that you, as their Guide, will contact them to organize a debrief for their feedback report.

You will also receive an email notification when your participant completes their assessment. The email will include a link in the assessment software where you can download your participant's feedback report.



Watch this helpful video for how to send an assessment:
youtu.be/oPg_hLyXIUo

HOW TO GENERATE AN ASSESSMENT FOR A PARTICIPANT

Follow these steps to send an assessment to 1 participant. These steps are not dependent on the participant being part of a project; however, if you want a participant's survey results to be included within a group report of a project, then make sure to add them to that project **before** you generate the assessment.

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.

Participants

Brock Li

Search

Add Participant

Enter Participants name and click "Search"

Search Results

Participants

brock li

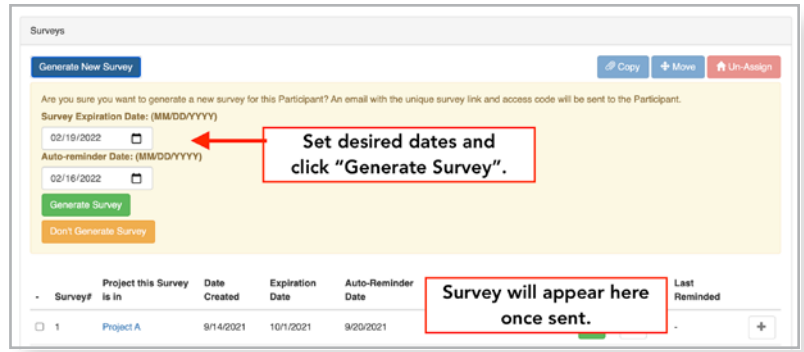
Search

Add Participant

Name	Email	Organization	Date Created	Survey Expiration Date	Survey Auto-Reminder Date
Brock Li	BrockLi@gmail.com	Tester	12/1/2021	12/10/2021	12/7/2021

Click on the desired Participant to view details.

- Go to the "SURVEYS" section and select "GENERATE NEW SURVEY".
- Enter the following:
 - Survey Expiration Date** > This is the deadline by when the participant must complete the assessment. The default date is 2 weeks (14 days) from when you generate the assessment. The expiration date can be set to a maximum of 6 months.
 - Auto-Reminder Date** > The software will send an auto-reminder email to participants if they have not yet completed the assessment. We recommend setting this for at least 3 days prior to the expiration date or at a time which fits into the development support you are providing this participant.
- Select "GENERATE SURVEY" after the Survey Expiration and Auto-Reminder dates are set. The participant will immediately be sent an email with their personalized link and access code to complete Be Well Lead Well Pulse®.



HOW TO GENERATE ASSESSMENTS IN BULK

Follow these steps to generate **1** assessment for **multiple individuals** that are part of the same project. This is a useful function when you want to send a group of people a new assessment at the same time and who will need to complete the assessments at the same time. (Note: You must have enough assessment credits in your Guide account to use this option.)

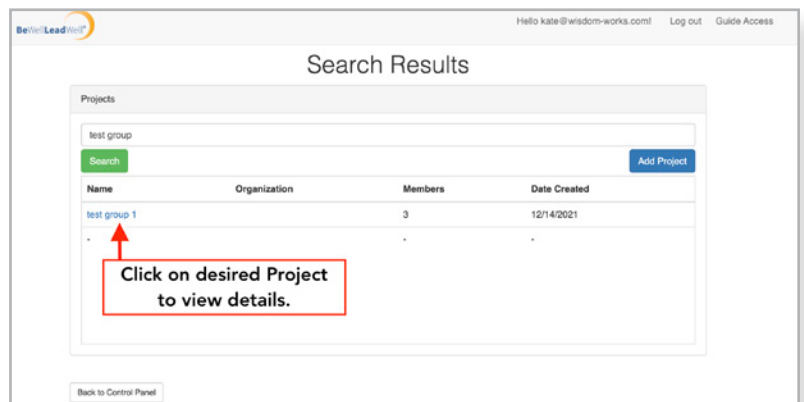
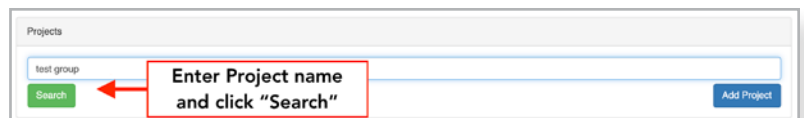


Watch this video for how to send assessments in bulk: youtu.be/p4zTuxTOUaE

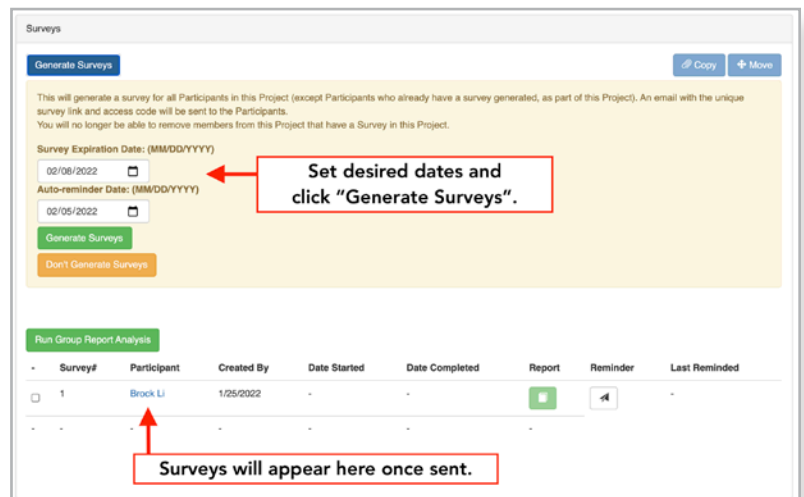
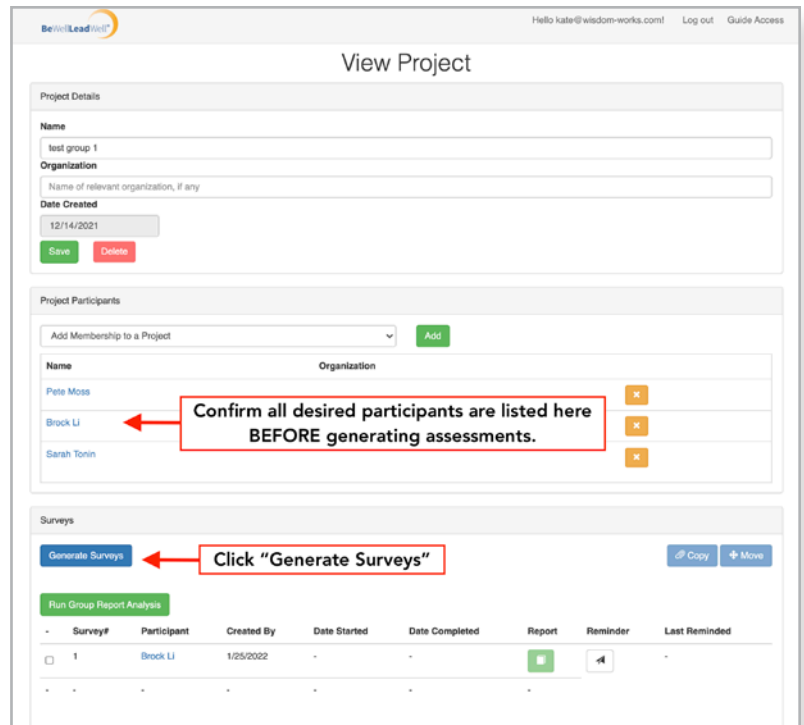
BEFORE you take these steps, make sure all of your participants have been added to the desired project. For how to add participants to a project, refer "TO ADD PARTICIPANT TO A PROJECT" on Page 6.

Once your participants have been added to your project:

- Access the home page (Control Panel) and enter the projects name in the PROJECTS search bar. Select SEARCH.
- Select the desired project from the list of projects to view the details. You should now be viewing the desired project with VIEW PROJECT at the top of the page.



3. Scroll through the names in the "PROJECT PARTICIPANTS" section on this page to confirm that all desired participants have been added to this project.
4. Go to the "SURVEYS" section and select "GENERATE SURVEYS"
5. Enter the following:
 - a. **Survey Expiration Date** > This the deadline by when all of the participants must complete the assessment. The default date is 2 weeks (14 days) from when you generate the assessments. The expiration dates can be set to a maximum of 6 months.
 - a. **Auto-Reminder Date** > The software will send an auto-reminder email to participants if they have not yet completed the assessment. We recommend setting this for at least 3 days prior to the expiration date or at a time which fits into the development support you are providing this participant.
6. Select "GENERATE SURVEYS" after the Survey Expiration and Auto-Reminder dates are set. All participants will immediately be sent an email with their personalized link and access code to complete Be Well Lead Well Pulse®.

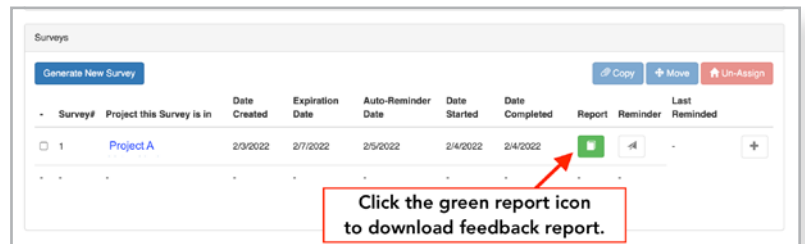
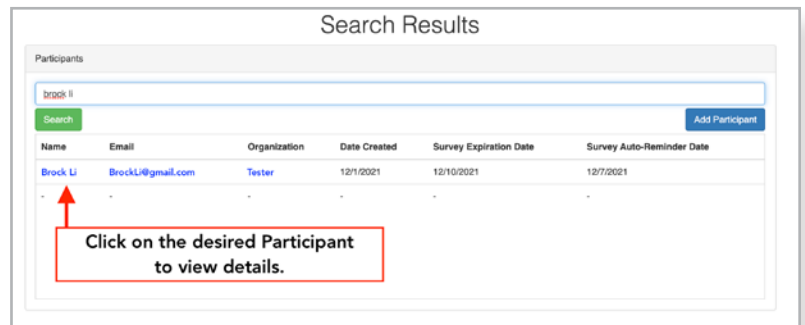
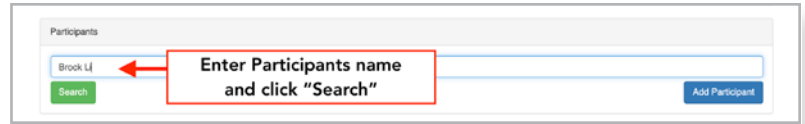


Feedback Reports

When a participant completes Be Well Lead Well Pulse®, they will receive a confirmation email informing them that you as the Guide will reach out to debrief their results. You will also receive an automated email informing you that the participant's feedback report is ready to be downloaded.

HOW TO DOWNLOAD A FEEDBACK REPORT

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Go to the "SURVEYS" section to see the participants survey listed.
4. Select the green report button to download the feedback report for the desired survey. This will generate a PDF that will automatically download to your device. (This may take 10-20 seconds to generate; please don't navigate away from this page before the download is complete.)

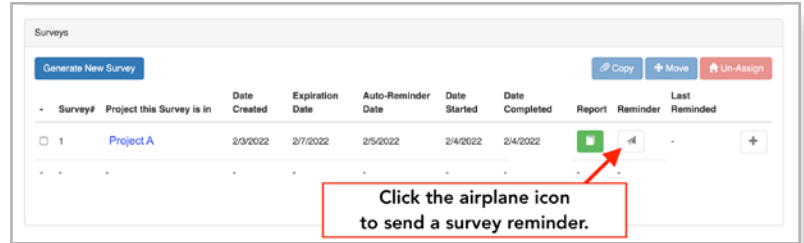


Save the participant's report in a secure place to protect the participant's confidentiality.

Additional Functionality

HOW TO SEND A REMINDER TO PARTICIPANTS

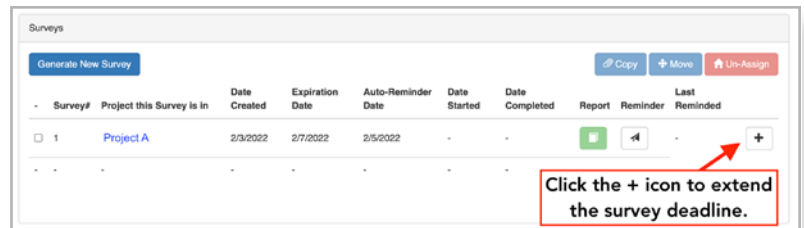
You can send a reminder email for a participant to complete their Be Well Lead Well Pulse® assessment at anytime. This is helpful for when you want to send a reminder before or after the auto-reminder you already set, or if the participant is having trouble finding the original email with their link and access code.



1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar and select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Go to the "SURVEYS" section and navigate to the row of the assessment you want to remind the participant about.
4. Click the paper airplane icon under the "REMINDER" column. This will immediately send the participant a reminder email with their personalized assessment link and access code.

HOW TO EXTEND THE SURVEY DEADLINE

If a participant does not complete an assessment before the set deadline, the assessment link will expire and they will not be able to complete the assessment. To prevent this from happening, you can extend the survey deadline by **2 weeks** (14 days). The 2 weeks applies from the date when you trigger the extension.



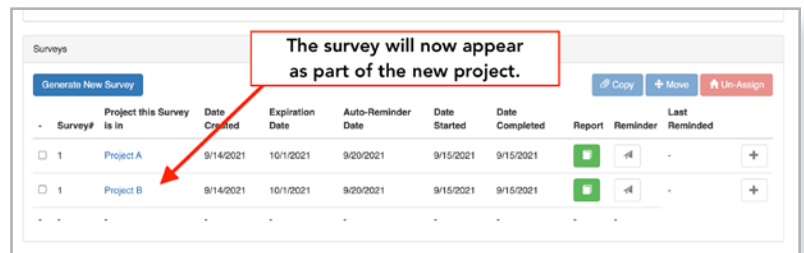
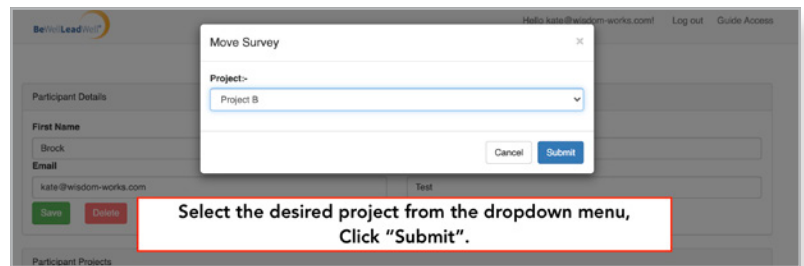
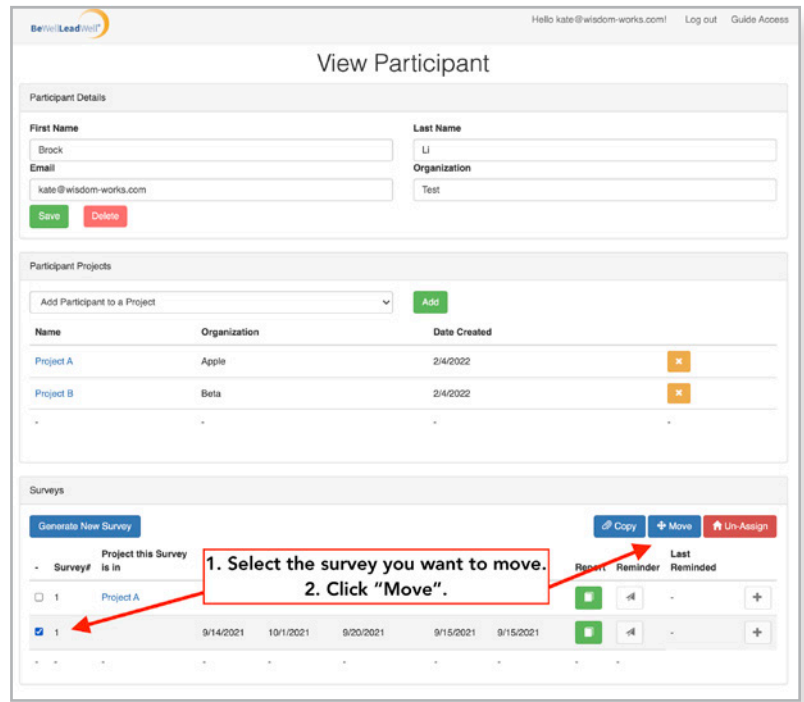
Note: Once an assessment is sent to a participant, that assessment purchase has been used from your Guide account regardless of if the participant completes the assessment or not. Expired assessments will not be credited back to your account.

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Go to the "SURVEYS" section and navigate to the row of the assessment for which you want to extend the deadline.
4. Click the "+" button at the end of the row. This will immediately send an email, including their assessment link and access code, alerting the participant of the extended deadline.

HOW TO MOVE AN ASSESSMENT INTO A PROJECT

Sometimes you may need to generate an assessment before you know if that person will be part of a project. This functionality enables you to move an existing assessment (in progress or completed) into a project after the assessment has been generated.

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Go to the "PARTICIPANT PROJECTS" section and add the participant to the desired project. See Page 6 for complete steps.
4. Go to the "SURVEYS" section and navigate to the assessment that does NOT currently have a project listed under the "PROJECT THIS SURVEY IS IN" column. Click the box on the left-hand side.
5. Click the "MOVE" button on the right-hand side of the desired survey. A pop-up window will appear. Select the desired project from the dropdown menu and click "SUBMIT". That survey has now been added to that project and will be included in any group reports run for that project.



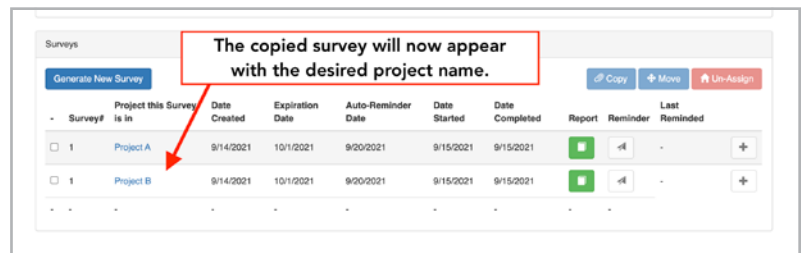
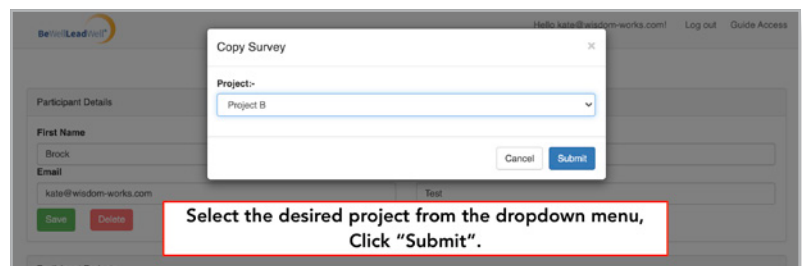
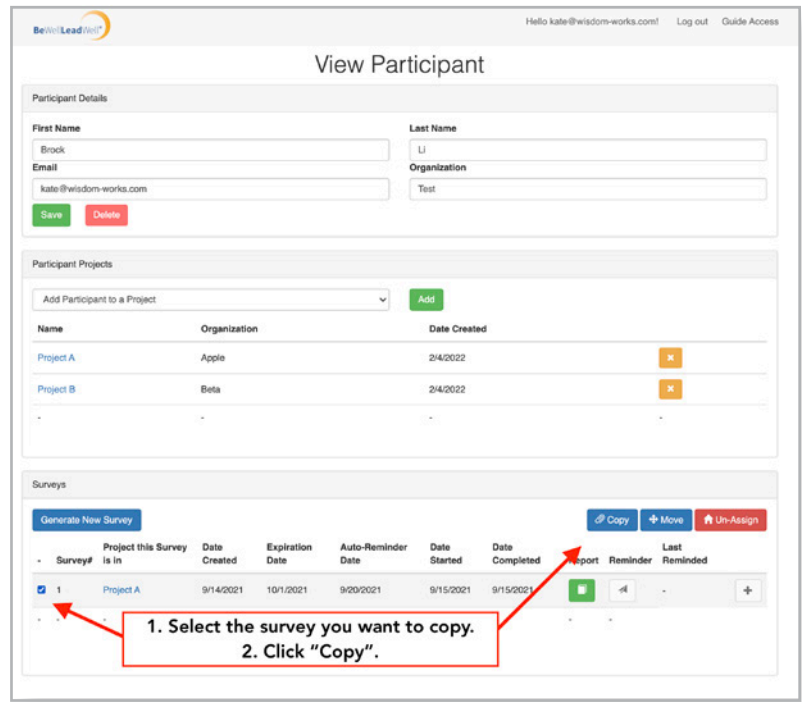
HOW TO COPY AN ASSESSMENT INTO A PROJECT

You have the ability to include a participant's data from 1 assessment in multiple projects. This is helpful when the participant is part of different projects within the same time frame and you do not want to have them take multiple assessments.

When you add a participant to a new project, the software will *not* automatically include an existing assessment into that new project.

Here's how to copy the assessment data into a new project:

1. Access the home page (Control Panel) and enter the participants name in the PARTICIPANTS search bar. Select SEARCH.
2. Select the desired participant from the list of names to view their details. You should now be viewing the desired participants details with VIEW PARTICIPANT at the top of the page.
3. Go to the "PARTICIPANT PROJECTS" section and add the participant to the desired project. See Page 6 for complete steps.
4. Go to the "SURVEYS" section and navigate to the assessment you want to copy into the new project. Click the box on the left-hand side.
5. Click the "COPY" button on the right-hand side of the desired survey. A pop-up window will appear. Select the desired project from the dropdown menu and click "SUBMIT". That survey data has now been copied and added to the new project and will be included in any group reports run for the new project.



Security Guidelines

The following guidelines ensure the Be Well Lead Well Pulse® assessment software remains secure and confidential. Please follow these guidelines to protect the confidentiality and privacy of all users.



Data security is a priority for Wisdom Works. Learn more about our Privacy Policy here: www.bewellleadwell.com/privacy-policy.

PASSWORDS: Passwords must be at least 8 characters and include at least 3 of the following: upper case, lower case, numeral, or special character. You'll be prompted to change your password every 75 days. It is a best practice to keep your passwords in a secure and private location.


FEEDBACK REPORTS: It is important that an individual's feedback report remain confidential. If printed, refrain from keeping feedback reports in an open or highly trafficked area. If saved online, ensure feedback reports are kept within a private and secure online location. If you are viewing an individual's feedback report in a public space, ensure that it is not left unattended or visible to third parties.

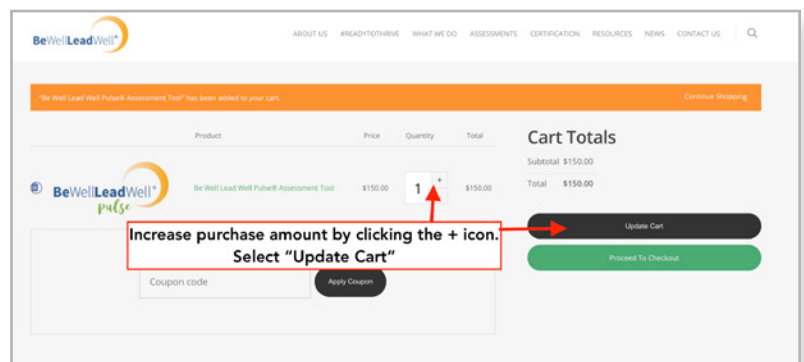
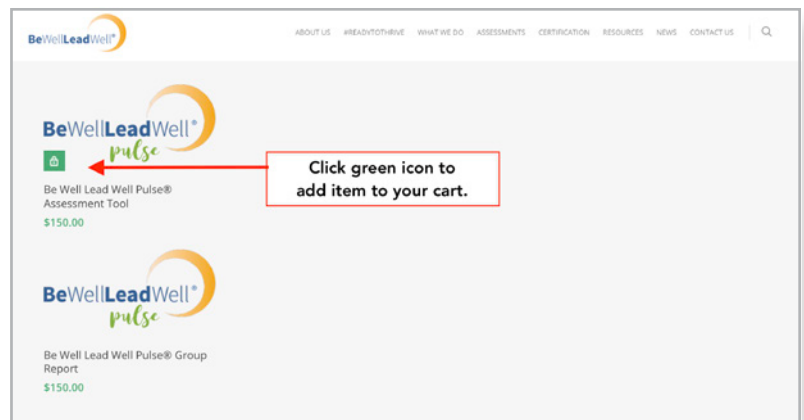
COMPUTER SECURITY: It is a best practice to ensure your computer is protected with updated antivirus software and firewalls to prevent third parties from accessing Be Well Lead Well Pulse® through your guide account.

How To Purchase Assessments & Group Reports

Follow the below steps to purchase assessments and group reports:

1. Visit: www.bewellleadwell.com/shop.
2. Hover above the "Be Well Lead Well Pulse® Assessment Tool" or "Be Well Lead Well Pulse® Group Report" to view the green cart icon. Select this icon to add the selected item to your cart.
3. Adjust the number of assessments or group reports by selecting the plus icon next the number on the "Cart" page. Select "Update Cart" to update the pricing. Bulk pricing discounts for assessments will be automatically applied when you update the cart.
4. Select "Proceed to Checkout" to finalize your purchase.

 Watch this video for information about how to order Be Well Lead Well Pulse® assessments and group reports: youtu.be/vKO6ybal54M





BY WISDOM WORKS GROUP INC.



JANUARY 2022