My Career Insights

ADVISER ACCESS GUIDE

What is Adviser Access?

Adviser Access will enable you to manage elements of your school's **My Career Insights** experience.

With your Adviser Access you can:

- **Monitor** the progress and completion rate of your students' Morrisby Profile and the Unpacking Career Interview
- Access student **Morrisby Profile Reports**
- **Access** student **self-reported information**, including health and other information, that may impact on the contents of a student's report
- Generate **recovery codes** for students, if required
- And much more....

A short course is available to you should you wish to upgrade to full Morrisby Manager access (see final page for details). Other than the default features, as a Trained Adviser, you can:

- **Access stats** for your school
- **Reset** assessments
- Create further **staff access**
- **Self deliver** unpacking interviews.

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Creating your login

Step by step guide

1. Provide your 'education' **email address** to your local MCI Program Coordinator.

   Note: Only education emails can be used to create adviser log in. If you have used your education email to create a Morrisby profile you will need to change this to a personal email. Speak with your Program Coordinator for help with this.

2. The Program Coordinator will **process your request.**

   Note: requests will only be processed for **eligible school staff** who require Adviser Access to support students' participation in the program, such as career practitioners and staff involved with pathway planning. Only staff employed at the school can be provided with access.
   There is **no limit** to the number of eligible school staff that can be provided with Adviser Access at each school.

3. An **email** will be sent to you with a **link to create a password**. Click the link and create a password.

4. Visit https://app.morrisby.com/login and login with your email address and password.

Make it Secure

We highly recommend enabling Two Factor Authentication (2FA)

Two factor authentication is a mechanism used to make websites more **secure.** Once activated, you will be asked for a code upon login generated by an **app on your phone or tablet.** This extra step helps prevent access to your account in case your password is obtained by someone.

To set up 2FA:

1. Click on **your name** on the top right corner and select '**My Account**'
2. On the **left menu** select '**Security**'
3. Click on '**Setup Two Factor Authentication**' and follow the instruction on the screen.

Standard Adviser Access

This section will help you understand the **main features and functions** available by default through your Adviser Access.

This includes:

1. An overview of the **Students tab**
2. A description of the **icons and links** available under the Students tab
3. How to view and generate a **Student Report**
4. How to access an **Adviser Report**
5. How to access students' **Online Morrisby Profile**
6. How to **generate recovery codes.**

Morrisby

My Career Insights
Maddie Demo
Murrayside School
04 April 2024
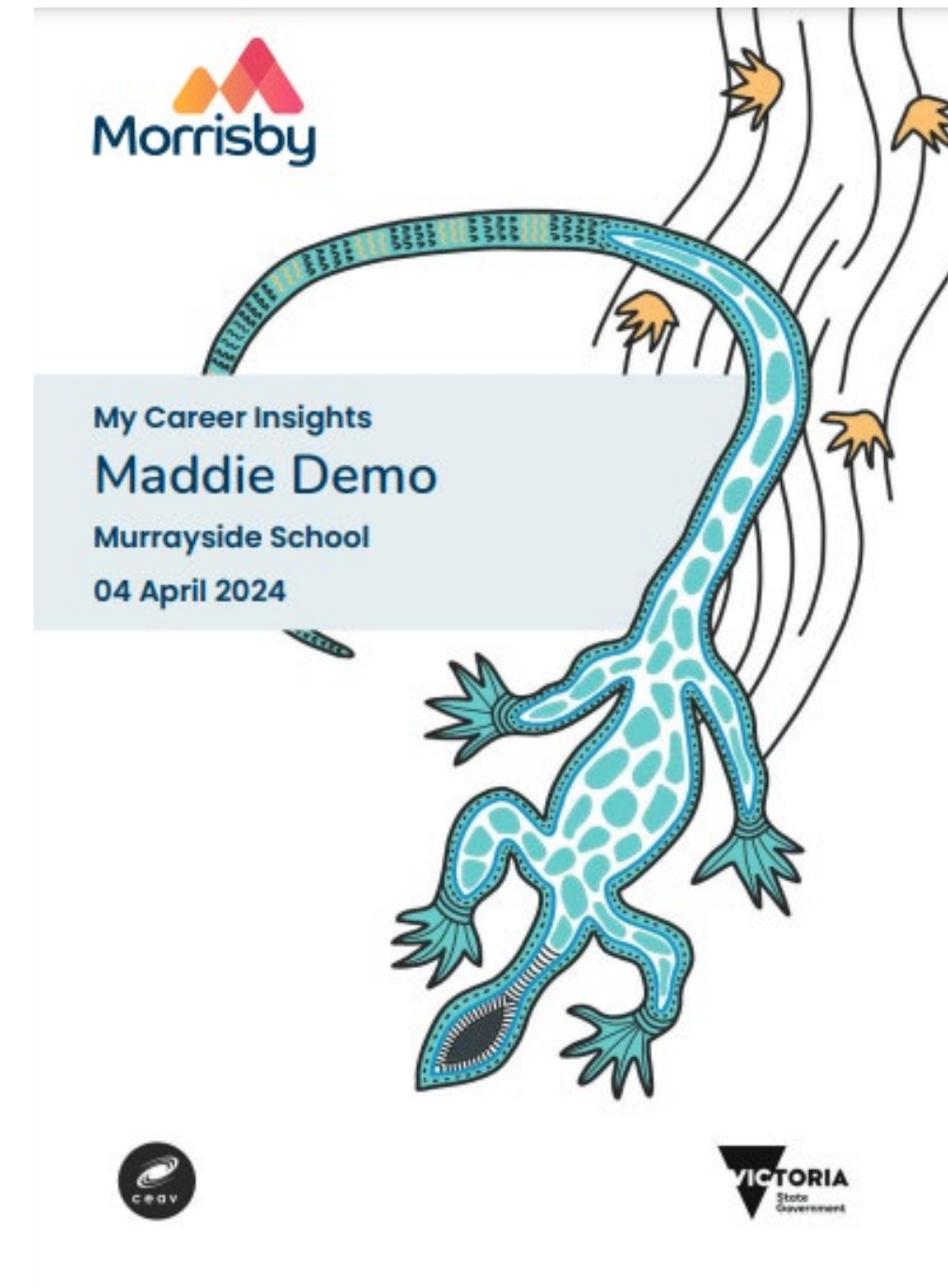
1. Student Overview

When you **log-in to Adviser Access**, click on the **Students tab.** This is where you will see the students that have registered for the Morrisby Profile at your school.

On the **Overview tab,** for each student registered you will see their:

- **Name:** student
- **Access Icon:** access to each student's Online Morrisby Profile
- **Sign-Up:** date of sign up by student
- **Last Login:** last log-in by student
- **Year Group:** student's current year level
- **Level:** student's educational level (this could be center default, calculated at aptitudes completion, or selected by the student).

1. Student Overview cont.

You will also see several **icons** that will provide you with information about **students' progress** in completing the program, including:

- **Alerts:** health information & ipsatisation (incl. for EAL students)
- **Interview:** completion of the one-on-one interview
- **Profiling Status:** completion of the Morrisby Profile Aptitudes modules
- **Reports:** access to individual Student Reports (full and short) and an Advisor report

Video Tutorial

1. Student Overview - Icon key

Profile Types – The 4 Morrisby profile types are:

Full Profile   `MP`

Optional Aptitudes   `MP`

Morrisby Careers   `MC`

Elemental Aspirations. (Specialist and SDS settings) `EA`

Interview Eligibility – based on completion status of profile type:

Eligible to be interviewed

Not eligible to be interviewed.

Status Percentage – progress oversight:

Not started   0%

Part way through   34%

Completed   100%

Interview status:

Not assigned to a consultant

Interview occurring

Interview completed and notes shared

2. Interview Icons

The interview icon changes to **indicate the progress of the one-on-one interview** with the student, and when the interview notes have been uploaded by the career consultant, as follows:

Preparation not complete	Interview Assigned	Interview notes shared
Interview preparation not complete	This Interview has been assigned by the Career Consultant	Student has completed their interview

When interview notes have been uploaded by the career consultant, these will also be **included** in the student's **Morrisby Profile Report** (when next produced).

3. Status Icons

The status icon changes to **indicate a student's progress** in completing the full aptitudes modules, as follows:

Registered	In progress	Not yet viewed
0%	34%	100%
Has not yet commenced their profiling	Progress percentage. Report will not generate until complete.	Student has completed their profile.
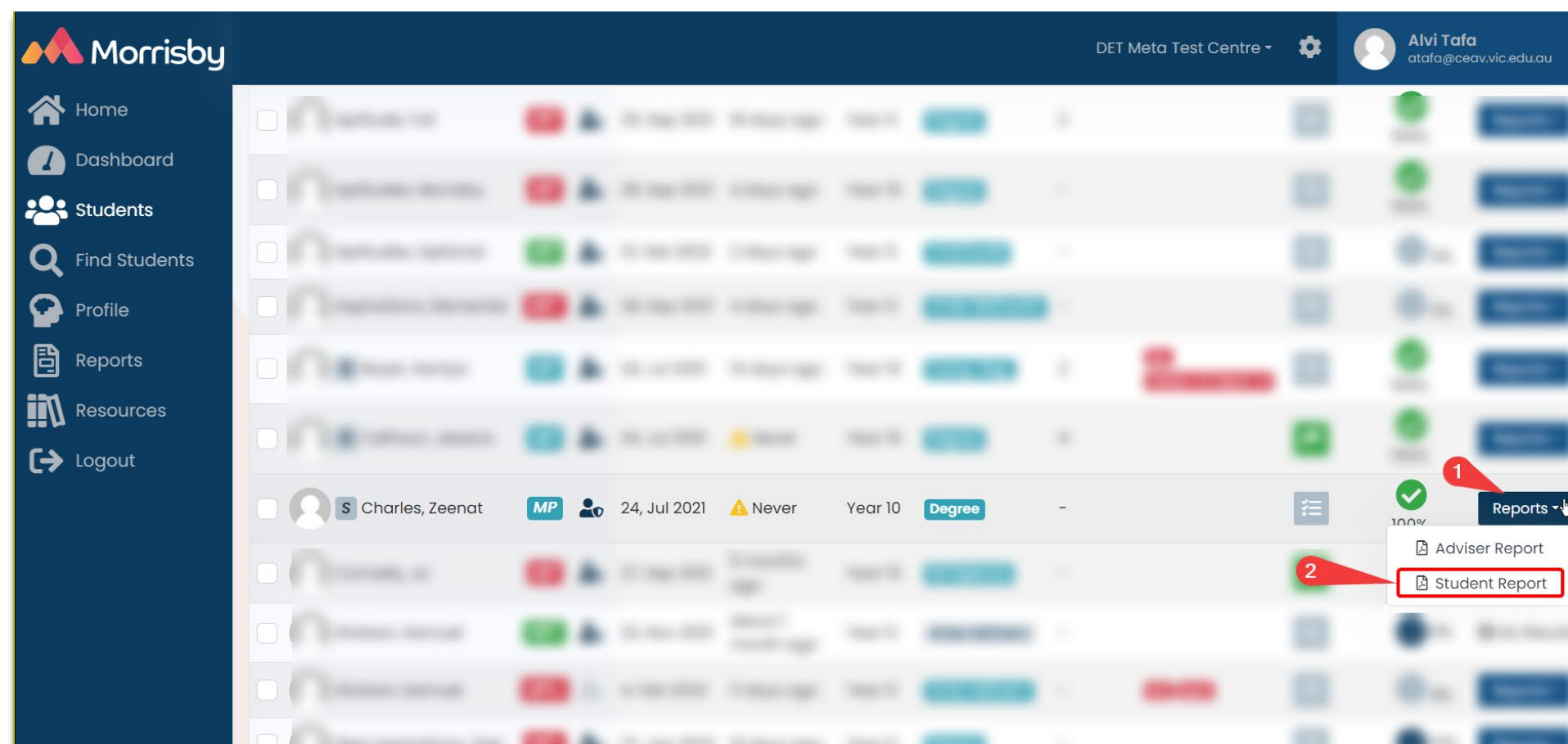
This function will allow you to work with your MCI Program Coordinator to finalise the **profiling process** for all students and arrange interviews when profiling is completed.

Note that these icons are only relevant to students that undertake the Aptitudes in the full or **Optional Aptitudes profile or if a Morrisby Careers profile is switched to a full profile following receipt of consent. You will not see the percentage icons for any profile that does not contain or has not had the Aptitudes started.**

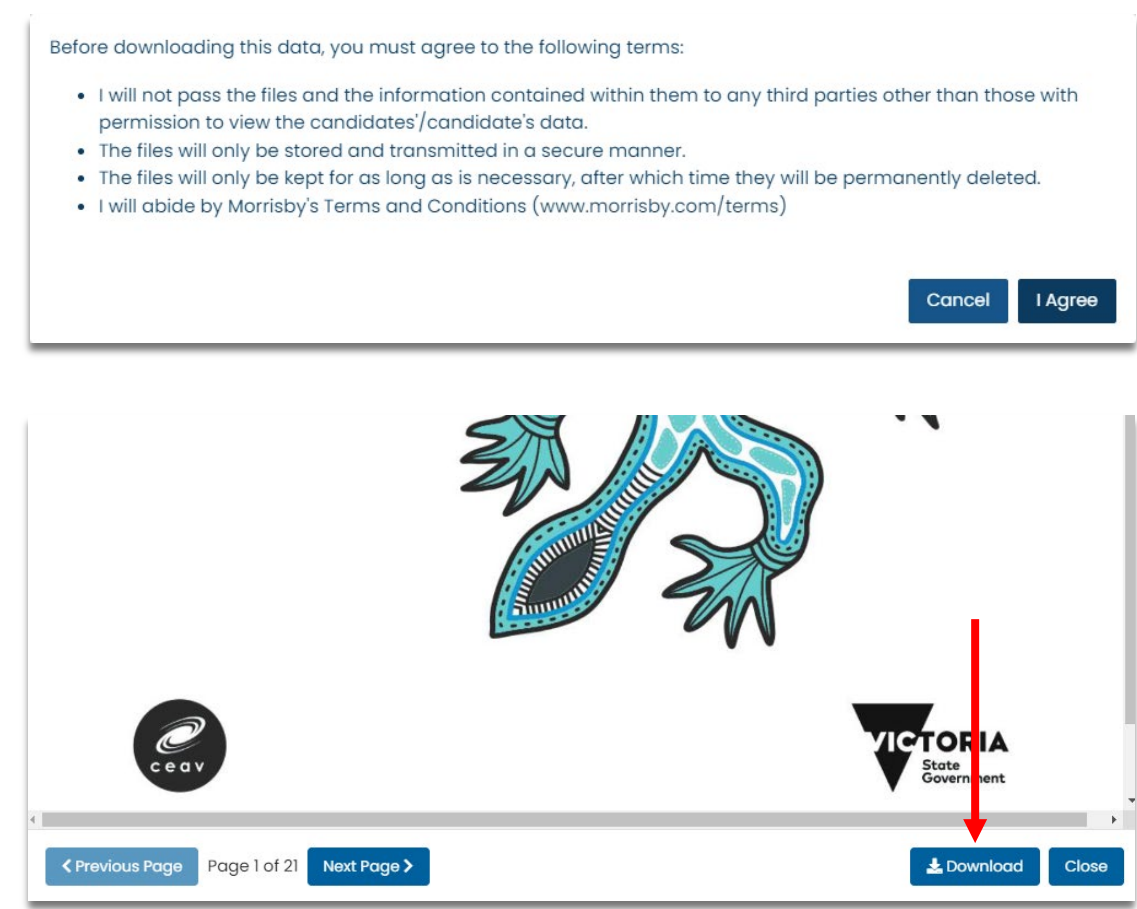# 4. Reports - Candidate

Individual Student Reports can be viewed by clicking on the **'Student Report' link** under **'Reports'.**

A PDF of the report can also be downloaded from here. Before doing so, you **must agree to the Terms of Download** as set out by The Morrisby Organisation Terms and Conditions.

4. Reports - Adviser

By clicking on **'Adviser Report' under 'Reports',** an adviser summary for that student will be generated.

The report summarises the **key results** for that student, as set out in their Student Report. It includes the results from any **modules/questionnaires** completed and the **career suggestions** based on those results.

Each summary report **can be downloaded.**
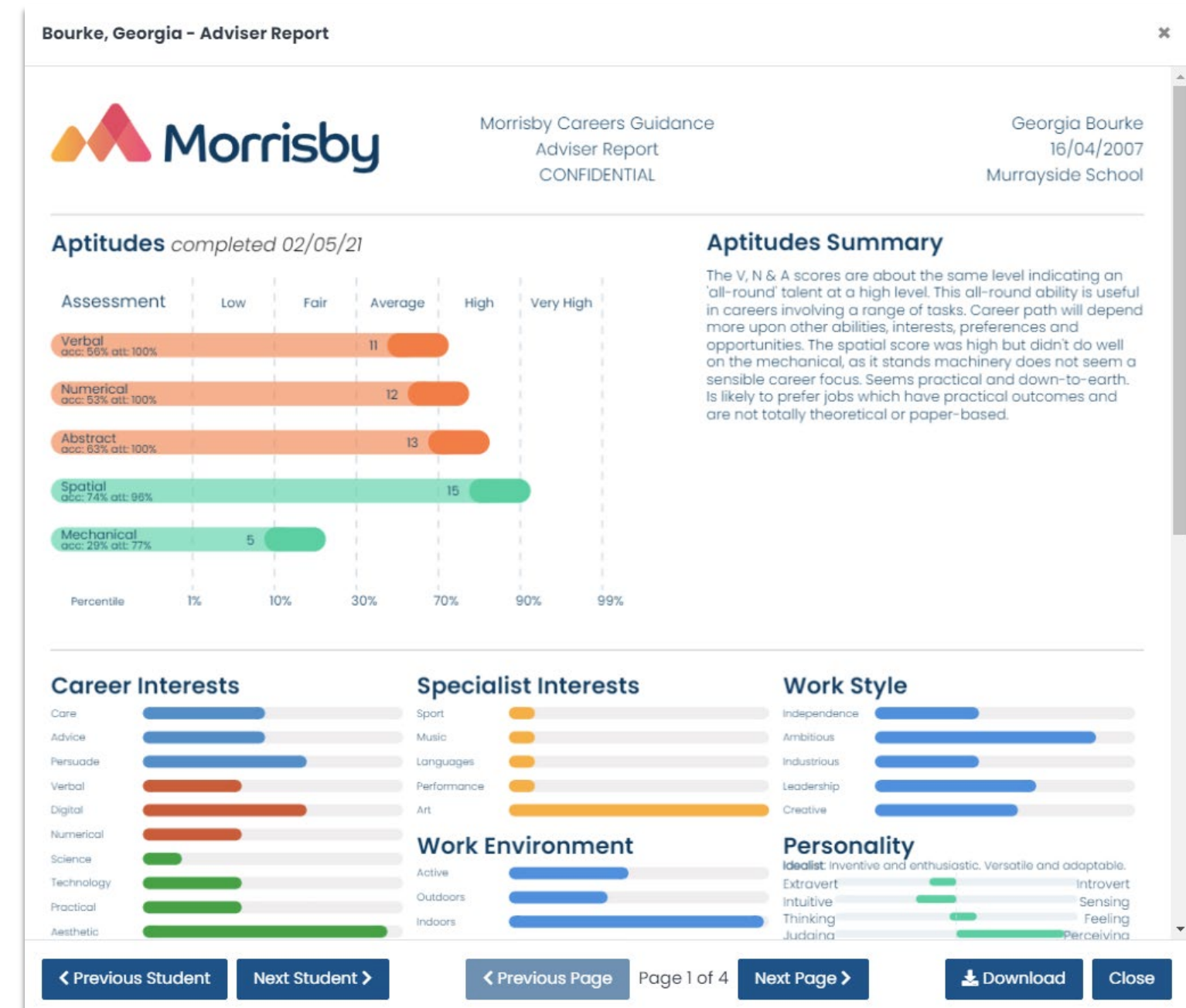
4. Downloading multiple Reports

Multiple students' reports can be generated and downloaded if required.

1. **Select** the students whose reports you wish to download OR check the box next to 'Name' above the list of names, which will **select all students**

2. Click **Actions**

3. Click on **Generate Reports.**

4. Select the **required** report

5. Click **Generate** and confirm by clicking **OK**

6. The download link will be available under the **Reports** button on the **top navbar**

7. You can now **download** ⬇ the reports you have generated for the selected students.

Video Tutorial

5. Access Online Profile

By clicking on the '**Impersonate' icon** 👤🛡 , you will be able to access a student's **interactive** online Morrisby Profile. You will also be able to **download a PDF** of the student's report, which we discussed earlier, from within the online Morrisby Profile. Anything you click while 'impersonating' will not be saved for the student.

Video Tutorial

6. Recovery Codes

To create a recovery code:

1. **Click** on a student's name to open their details page

2. **Click** '**Create Recovery Code'** under '**Actions'** in the top right corner

3. **Reveal** recovery code once it appears underneath the candidate's username.

Students can then use the recovery code to **reset their passwords** HERE

Video Tutorial

6. Recovery Codes (multiple)

This feature allows you to **create multiple recovery codes** as well. You can then download these on a **CSV file** along with other students' information.

To Create Multiple Recovery Codes:

- **Select** multiple or all students

- Click **'Actions'** and select **'Create recovery codes'**

- **Click 'Actions' again,** then click **'Downloads'.** Select **Student Details** reports to download a CSV with details about the selected students, including their recovery codes.

Trained Adviser Access

This section includes an **overview and explanation** of some functionalities available **only** to **Morrisby Trained Advisers.** Information on how to become **Morrisby Certified is available on page 22.**

Extra features available to Morrisby Trained Adviser are:

Dashboard
an interactive overview of your school's statistics

Reset Assessments
a feature that allows you to reset specific modules of students' Morrisby Profile

Staff & Advisers
Ability to create and manage additional staff logins

Self Delivery
Upon CEAV approval, you will be able to deliver unpacking interviews to students

7. Dashboard

The Dashboard is an **interactive overview** of your **school's statistics** for a selected group of candidate profiles.
The different cards can be *flipped* by clicking on them to view data relevant to the selected group:

1. **Start** by selecting the desired **group of students** (this could be a year group or a group that you have created)
2. **Click** on the **arrow ⇆ icon** next to the data name you would like to view
3. You can also download the data as CSV using the **three-dot icon** ⋮

Video Tutorial

8. Reset Assessments

If a student needs to **re-take any of the modules**, you can organise this from within your **Trained** Adviser account.

1. **Select** the **student** who needs an assessment(s) reset

2. **Click** **'Reset Assessments'** in the **'Actions'** drop-down

3. In the dialog window that opens, **select** the assessments you want to reset and click **'Reset'**

4. A warning will appear to **confirm** you want to **permanently delete** the results for the selected assessment(s). Click OK

Video Tutorial

9. Create Staff Accounts

As a Morrisby Trained Adviser, you can create **additional staff logins**. They will be given a **basic Career Adviser role**. If they wish to be assigned a Trained Career Adviser role, they will need to obtain the Morrisby Certification as well.

1. **Click** on the '**Staff & Advisers**' option on the left-hand menu
2. **Select** '**Add Staff**' and input their details
3. **Enable** access to **All Students** and assign the role of **Career Adviser**
4. **Click** on '**Save Changes'.**

Managing staff logins from the 'Staff & Adviser' menu is simple.

- You can **Edit** details 🖉 or **Delete** 🗑 their account
- You can **Reset** their password and **Resend** a Welcome Email under the 'Actions' dropdown menu.

Add Staff

First Name
Staff

Last Name
Member

Email
staff.member@myscool.test

Job Title

Student Access
- ● All Students
- ○ Access to Students in specified groups

Roles
- ☑ Career Adviser

An email will be sent to the address entered with details of how to set a password. No password will be shown on this page.

⚠ You have unsaved changes

Save Changes   Cancel

Actions ▾

✉ Send Password Reset

✉ Resend Welcome Email

Video Tutorial

10. Self Delivery

As a **Morrisby Trained Adviser** and if you are a qualified Career Practitioner, you can **self-deliver profile unpacking sessions** at your school. Once the feature has been **enabled by an MCI Team Member** (usually your Program Coordinator), you will need to:

Assign Students to Yourself

1. Click the 'Interview' icon

2. Follow the flow to Assign and Impersonate the Student

Create and Share Interview Notes

1. Click on 'Add Notes'

2. Select 'Save Notes' and toggle 'Shared' to YES

Video Tutorial

Full Morrisby Profile Certification Training

Morrisby Certification

If you are interested in moving **beyond** the functionality of the standard Morrisby Adviser Access, you can register your interest in becoming **certified for full Morrisby Certification training.**

This will allow you to utilise the **additional functions** we discussed earlier: **Dashboard, Reset Assessments, Staff & Advisers, Self Delivery.**

To gain certification, you will need to complete your **own Morrisby Profile** and **a self-paced online course** which usually takes around **4-5 hours** to complete. The course is **free of charge** for **eligible Victorian government school staff**, including career practitioners, leading teachers, and other staff working with students on the program.

If interested, simply fill-in the form available HERE

Optional Aptitudes Profile Training

If you would like to **gain an understanding** of the Optional Aptitudes and Elemental Aspirations profiling pathway.

a. **Complete an Optional Aptitudes profile** to get oversight on which students this may suit
b. Watch a series of **short training videos.** This will enable you to be granted adviser access so that you can 'self-deliver' the unpacking of an Optional Aptitudes profile with your students who completed the Aspiration Questionnaires only (Interests and/or Personality). Alternatively, you can arrange for the profiles to be unpacked through your Program Coordinator.

Note for any Aptitudes 'unpacking', **full training is required**. Alternatively, the MCI team can book an unpacking session with a Career Consultant for any student with a full profile.

To register your interest, please complete this form HERE

Privacy Requirements

Adviser Access

A range of **security levels** exist within Morrisby, reflecting different **levels of access and functionality.** The view you will gain with Adviser Access contains a range of information that is covered by **Victorian privacy law** and the **EU GDPR Regulation.**

This information includes:

- Individual student reports and interview notes ('personal information')
- Health information
- Ipsatisation and adjustments for some students.

Once you have been provided with **Adviser Access,** you will be asked to **agree to the privacy statement** before seeing information about your school.

Privacy Requirements

Button to student report

Individual student reports

Individual student Morrisby Profile Reports are able to be viewed as described on **page 11**. Each report contains personal information about the student. The report may be **downloaded and viewed by individuals with Adviser Access.**

Before doing so, you must **agree to the Terms of Download** as set out by The Morrisby Organisation Terms and Conditions.

Please take time to **read this information.**

	Name			Signup	Last Login	Year Group	Level	Careers	Alerts	Interview	Profiling Status	Reports
☐	Aptitude, Full	MP		29, Sep 2021	5 days ago	Year 9	Degree	2		➡	✓ 100%	Reports ▾
☐	Aptitudes, Morrisby	MP		28, Sep 2021	4 months ago	Year 10	Degree	-		☰	✓ 100%	🗎 Adviser Report 🗎 Student Report
☐	Aspirations, Elemental	MPF		28, Sep 2021	4 months ago	Year 9	ATAR<90/CertIV	-		☰	⬤ 0%	Reports ▾
☐	S Boyer, Haniya	MP		24, Jul 2021	about 22 hours ago	Year 10	Comp. Deg.	2	ESL Verbal +9 / Mech +4	➡	✓ 100%	Reports ▾
☐	S Calhoun, Jessica	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	S Charles, Zeenat	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	Connelly, Jo	MP		27, Sep 2021	4 months ago	Year 10	HE Diploma	-		☰	⬤ 0%	Reports ▾
☐	Dickson, Samuel	MPF		23, Nov 2021	20 days ago	Year 9		-		☰	⬤ 8%	⊘ No Results
☐	Elem.Aspirations, Test	MPF		27, Jan 2022	6 days ago	Year 9	Degree	-		☰	⬤ 10%	Reports ▾
☐	S Flores, Ava-Mai	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	S Frost, Theresa 🔒	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	S Kerr, Dotty 🔒	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	S Krause, Reagan 🔒	MP		24, Jul 2021	⚠ Never	Year 10	Degree	-		☰	✓ 100%	Reports ▾
☐	S Krueger, Courtnie	MP		24, Jul 2021	⚠ Never	Year 10	Degree			☰	✓	Reports ▾

Before downloading this data, you must agree to the following terms:

- I will not pass the files and the information contained within them to any third parties other than those with permission to view the candidates'/candidate's data.
- The files will only be stored and transmitted in a secure manner.
- The files will only be kept for as long as is necessary, after which time they will be permanently deleted.
- I will abide by Morrisby's Terms and Conditions (www.morrisby.com/terms)

Cancel   I Agree

Privacy Requirements

Victorian privacy law

In Victorian government schools the management of 'personal information' and 'health information' is governed by the **Privacy and Data Protection Act 2014 (Vic)** and **Health Records Act 2001 (Vic)** (collectively, Victorian privacy law).

This ensures that the Department (including schools, and contractors/agents) can collect personal and health information necessary for its services and functions, while **recognising the right of individuals to have their information handled in ways that they would reasonably expect and in ways that protect their personal and health information.**

- **'Personal information'** is information or opinion, whether true or not, about a person whose identity is apparent, or can reasonably be ascertained, from the information or opinion – that is recorded in any form. For example, a person's name, address, phone number and date of birth (age). De-identified information about students can also be personal information

- **'Health information'** is information or opinion about a person's physical, mental or psychological health or disability, that is also personal information – whether in writing or not. This includes information or opinion about a person's health status and medical history, immunisation status and allergies, as well as records of wellbeing services.

The Morrisby Organisation Privacy Policy

The Morrisby Organisation is registered in the **UK**. Data collected as part of setting up a student's Morrisby Profile is stored securely in accordance with **the EU General Data Protection Regulation** (Regulation (EU) 2016/679).

Resources

MCI **Tutorial Videos**

- How to Access Morrisby Manager
- Student Overview
- Generate Reports
- How to Generate and use Recovery Codes
- Access Student Online Profile
- Dashboard
- Reset Assessments
- Manage Additional Staff Accounts
- Self Delivery

Other **Resources**

- 2022 School Administration Guide
- Resources for Parents & Families
- Resources for Schools
- Resource Library
- How to transfer a student to your organisation : Morrisby

Contact **Us**

MCI Support Team
8:30am - 4:30pm (Monday – Friday)
(03) 9433 8033
support@ceav.vic.edu.au

Further information can be found on the My Career Insights Website
And on the Morrisby AU website.