



## **Advisor Accounts Guide**



**Advisor Accounts allow people to view client portfolios at different locations and send messages to them. The most important piece of the advisor account is the individual portfolio information.**

### **Initial set up of advisor accounts**

Step 1: Contact MCIS staff person at 1-800-3904 to set up your advisor account.

Step 2: Give us a list of agencies that you want to be an advisor for.

Step 3: MCIS staff will create the advisor accounts and notify you when they are complete.

*\*\*Important Note: you should have an administrative/staff account as well as an advisor account login.*

Advisor Account..... pages 4-8

How the client selects an advisor..... pages 9-10

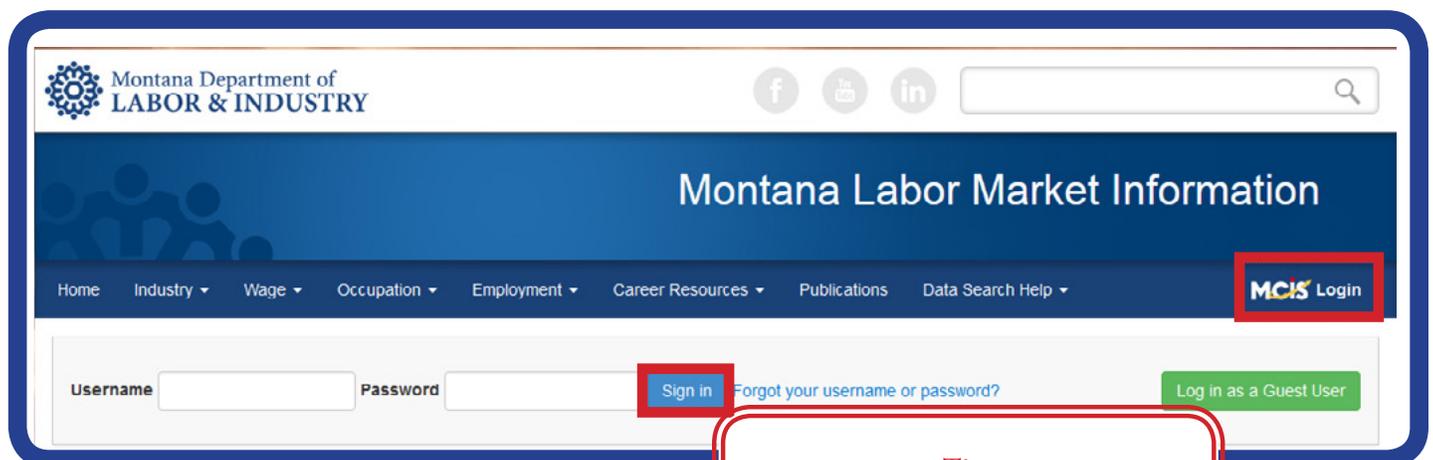
Go to <http://careers.mt.gov> and click on “MCIS Login” on the right side of the page.

Enter your username and password.

If you are not sure what your username and password is contact your MCIS

Administrator at your site or an MCIS staff person at 1-800-541-3904

Passwords must be at least 8 characters, and contain at least 1 uppercase and 1 lowercase letter, and 1 number. When you reset passwords the password is a temporary one and will need to be changed.

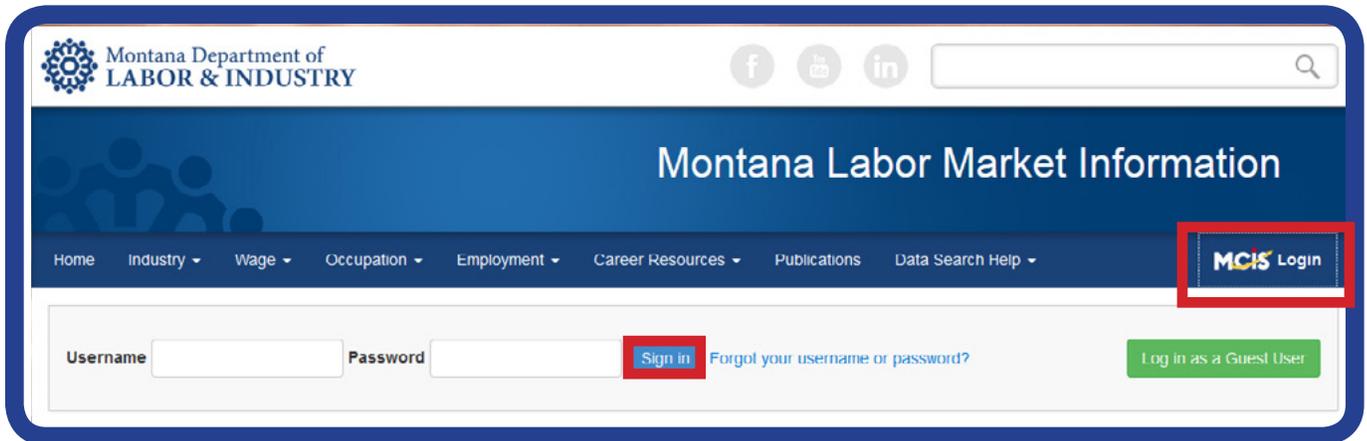


**Tip:**  
Make sure that you click the sign in button or you will get an error page

# ADVISOR ACCOUNTS - ADVISOR VIEW

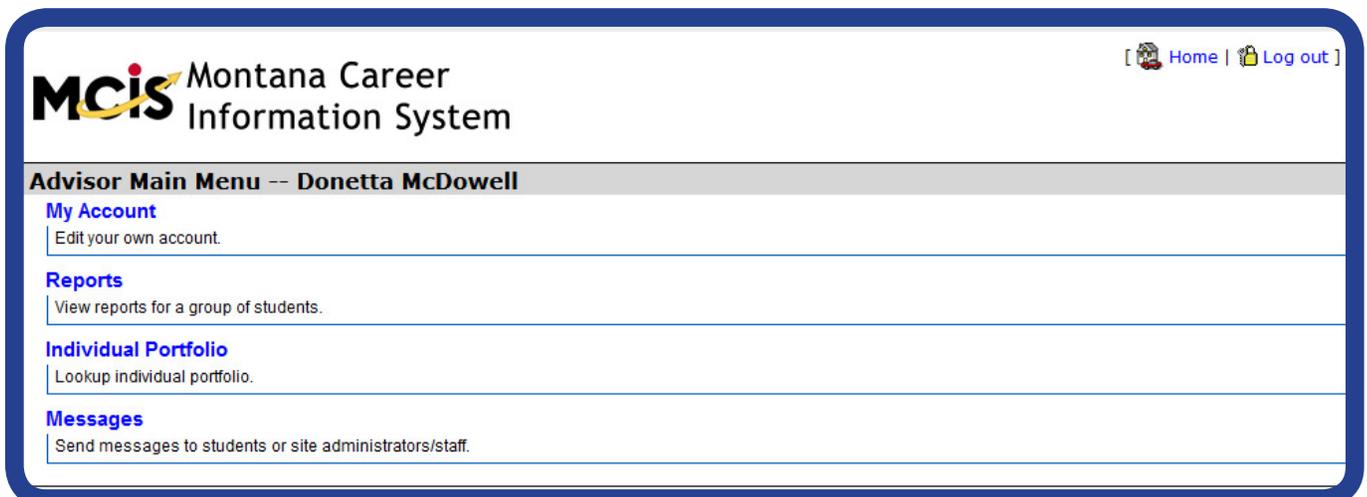
Advisor Accounts allow people to view a clients portfolio and send messages to a user.

Login with your advisor account username and password. If you are not sure what your login information is contact your site administrator or an MCIS staff member at 1-800-541-3904 To login go to <http://www.careers.mt.gov>



The screenshot shows the Montana Department of Labor & Industry website. The header includes the department logo and name, social media icons for Facebook, YouTube, and LinkedIn, and a search bar. The main heading is "Montana Labor Market Information". A navigation menu contains links for Home, Industry, Wage, Occupation, Employment, Career Resources, Publications, and Data Search Help. A red box highlights the "MCIS Login" button. Below the navigation is a login form with fields for "Username" and "Password", a blue "Sign in" button (also highlighted with a red box), a link for "Forgot your username or password?", and a green "Log in as a Guest User" button.

After entering your username and password click on the blue sign in button then you will see the Advisor Main Menu Below.



The screenshot shows the "MCIS Montana Career Information System" interface. At the top right, there are links for "Home" and "Log out". The main heading is "MCIS Montana Career Information System". Below this is a section titled "Advisor Main Menu -- Donetta McDowell". The menu items are: "My Account" (Edit your own account), "Reports" (View reports for a group of students), "Individual Portfolio" (Lookup individual portfolio), and "Messages" (Send messages to students or site administrators/staff).

1. Click on **Individual Portfolio** on the main menu.

**Advisor Main Menu -- Donetta McDowell**

**My Account**  
Edit your own account.

**Reports**  
View reports for a group of students.

**Individual Portfolio**  
Lookup individual portfolio.

2. In **Individual Portfolio** an advisor is able to reset passwords, view completed sections of a portfolio, and see any files that have been uploaded to the system.

**Advisor Search Portfolios -- Donetta McDowell**  
[Return to Main Menu](#)

Enter one or more search criteria. If you leave all search criteria blank, all users are retrieved.

Last Name:  Starts with ▼

First Name:  Starts with ▼

E-mail:  Starts with ▼

Username:  Starts with ▼

Unique ID:  Starts with ▼

\*\*\* In order to display all clients, leave fields pictured above blank and just click search.

When you are viewing portfolios you will also be able to reset passwords, view client portfolios, and see any client uploaded files

**Advisor Result list of portfolios search -- Donetta McDowell**  
[Return to select portfolios](#)

Select | Unselect | Export | Print | Send Message Total records: 13

	Last Name	First Name	Username	Password	Unique ID	Last Use	Grad Year	Site	Status	View	Files
<input type="checkbox"/>	Account	Student	studenttest	<a href="#">Reset</a>				R&A Staff	Active	<a href="#">View</a>	
<input type="checkbox"/>	Arneson	Misty	marneson1	<a href="#">Reset</a>		06/21/2011		Visitor High School	Active	<a href="#">View</a>	
<input type="checkbox"/>	Client	Student/	dmcowell_A	<a href="#">Reset</a>		07/13/2015		ABE - Libby	Active	<a href="#">View</a>	
<input type="checkbox"/>	McDowell	Collin	cmcdowell	<a href="#">Reset</a>		12/12/2012	2016	R&A Staff	Active	<a href="#">View</a>	
<input type="checkbox"/>	McDowell	Donetta	dmcowell_rastaff	<a href="#">Reset</a>		07/06/2015	2017	R&A Staff	Active	<a href="#">View</a>	
<input type="checkbox"/>	McDowell	Donetta	dmcowell88	<a href="#">Reset</a>		07/06/2015	2017	Visitor High School	Active	<a href="#">View</a>	
<input type="checkbox"/>	McDowell	Donetta	nettaroo	<a href="#">Reset</a>		07/06/2015	1988	Visitor High School	Active	<a href="#">View</a>	<a href="#">Files</a>
<input type="checkbox"/>	McDowell	Jane	dmcowell_hs	<a href="#">Reset</a>		07/28/2015	2017	Visitor High School	Active	<a href="#">View</a>	
<input type="checkbox"/>	Miller	Annette	anmiller	<a href="#">Reset</a>		07/28/2015	1991	R&A Staff	Active	<a href="#">View</a>	<a href="#">Files</a>
<input type="checkbox"/>	Olson	Chelsea	olson5	<a href="#">Reset</a>		02/10/2014	2013	R&A Staff	Active	<a href="#">View</a>	
<input type="checkbox"/>	Test	Zupload	zupload	<a href="#">Reset</a>		07/23/2015	2020	Visitor High School	Active	<a href="#">View</a>	
<input type="checkbox"/>	Ulmer	Kira	kulmer	<a href="#">Reset</a>		07/17/2015	2017	Visitor High School	Active	<a href="#">View</a>	
<input type="checkbox"/>	Walker	Mary Ann	Adminassistant	<a href="#">Reset</a>		10/17/2013	1978	R&A Staff	Active	<a href="#">View</a>	

1. Click on the **Reset Password** to reset a clients password to a new temporary password if they have forgotten their password.

Passwords must be at least 8 characters, and contain at least 1 uppercase and 1 lowercase letter, and 1 number. When you reset passwords the password is a temporary one and will be changed by the client.

✕
**Reset Password for user 'nettaroo'**

Please enter a temporary password, or click Generate Password to enter one automatically.  
 Passwords must be at least 8 characters, and contain at least 1 uppercase and 1 lowercase letter, and 1 number.

Temporary Password:  Generate Password

Reset security questions  
 Send password to 'johnsmith@yahoo.com'

Reset
Cancel

Tip:

Type in the temporary password that you want to use. Clicking on Generate Password creates a computer generated password that is hard to remember.

- Click on **View** to view activities the client has completed in MCIS.  
The more activities in MCIS that are done the more you will be able to see in the list.

## Montana Career Information System

**My Portfolio**  
**Sample**

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[\[ View Selected Item\(s\) \]](#)

**View these portfolio items:**

- Combined Report of Assessments
- Career Plan
- Checklists
  - PEP Talk Awareness
  - PEP Talk Exploration
  - PEP Talk Create The Plan
- Course Planner
  - Complete Report  
(detailed list of courses for each year)
  - Condensed Report  
(summary of courses by year and subject)
- Favorites
  - Financial Aid
  - Montana Schools
  - Occupations
  - Programs of Study
- Sort and Assessment Results
  - Career Cluster Inventory
  - Entrepreneurial Career Assessment Form
  - IDEAS
  - Interest Profiler
  - Reality Check
  - SKILLS
  - Work Importance Locator

- Application Tracker
  - Complete Report with notes
  - Condensed Report without notes
  - Apply for Scholarships
  - Schools I Am Applying To
- Résumé Creator
  - Personal Information
- Stored Files and Links
- Parents
- Visitors
- Advisors

[\[ View Selected Item\(s\) | Close Window \]](#)

- Click on **Files** to see any uploaded files that have been saved by the client, such as a resume.

## UPLOADED FILES

### - FILES FOR STUDENT DONETTA MCDOWELL

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**View Résumés**

File Name	Open
Recent_Grad_Resume.pdf	
Sample word resume.doc	

### Advisor Main Menu -- Donetta McDowell

**My Account**  
Edit your own account.

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**Reports**  
View reports for a group of students.

---

**Individual Portfolio**  
Lookup individual portfolio.

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**Messages**  
Send messages to students or site administrators/staff.

You can send messages to clients by clicking on Messages in the main menu and then send new message.

The messaging system is inside of MCIS and does not go to the client's email. When you send a message they will be notified the next time they login to their portfolio.

### Advisor Messages -- Donetta McDowell

[Return to Main Menu](#) [ Print ]

Select mailbox folder: Messages Received ▾

**Send New Message**

Messages you have received are displayed below:

[Select All](#) | [Unselect All](#) | [Delete](#) ( = Unread message; = Read message; = Deleted message) [Total records = 4]

	Sent	Subject	Last Name	First Name	Account Type	Site Name	Subject	View	Reply
<input type="checkbox"/>	07/16/2013	this is a test	McDowell	Donetta	Portfolio User	Visitor High School	this is a test	<a href="#">View</a>	<a href="#">Reply</a>
<input type="checkbox"/>	01/28/2013	IDEAS	McDowell	Donetta	Portfolio User	Visitor High School	IDEAS	<a href="#">View</a>	<a href="#">Reply</a>
<input type="checkbox"/>	03/15/2012	Advisor	Ulmer	Kira	Portfolio User	Visitor High School	Advisor	<a href="#">View</a>	<a href="#">Reply</a>
<input type="checkbox"/>	03/15/2012	Test	McDowell	Donetta	Portfolio User	Visitor High School	Test	<a href="#">View</a>	<a href="#">Reply</a>

### Advisor Send New Message -- Donetta McDowell

[Return to Messages](#)

To send a message, select from the **To** drop-down menu, then enter the subject and message body below. Click the **Send** button when you are done.

**To:** -- Select -- ▾

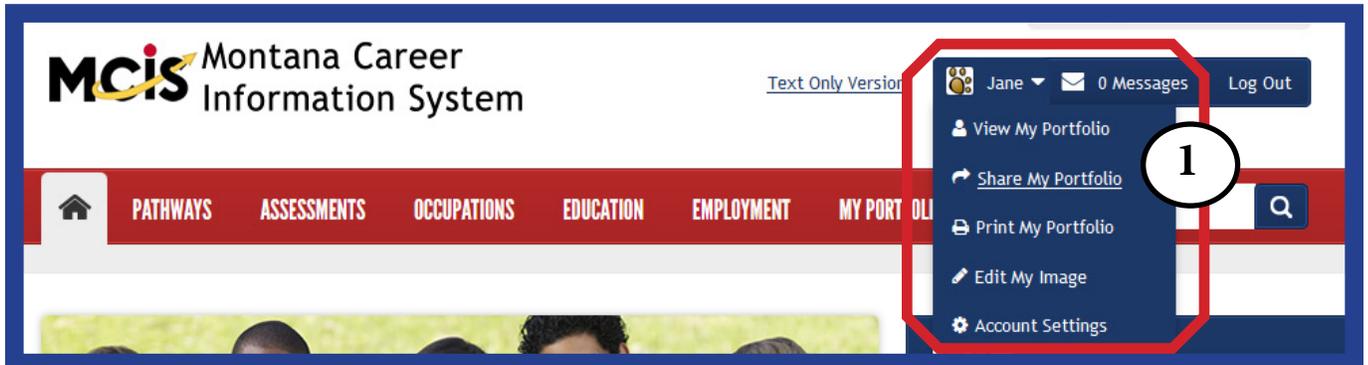
**Subject:**

**Message:**

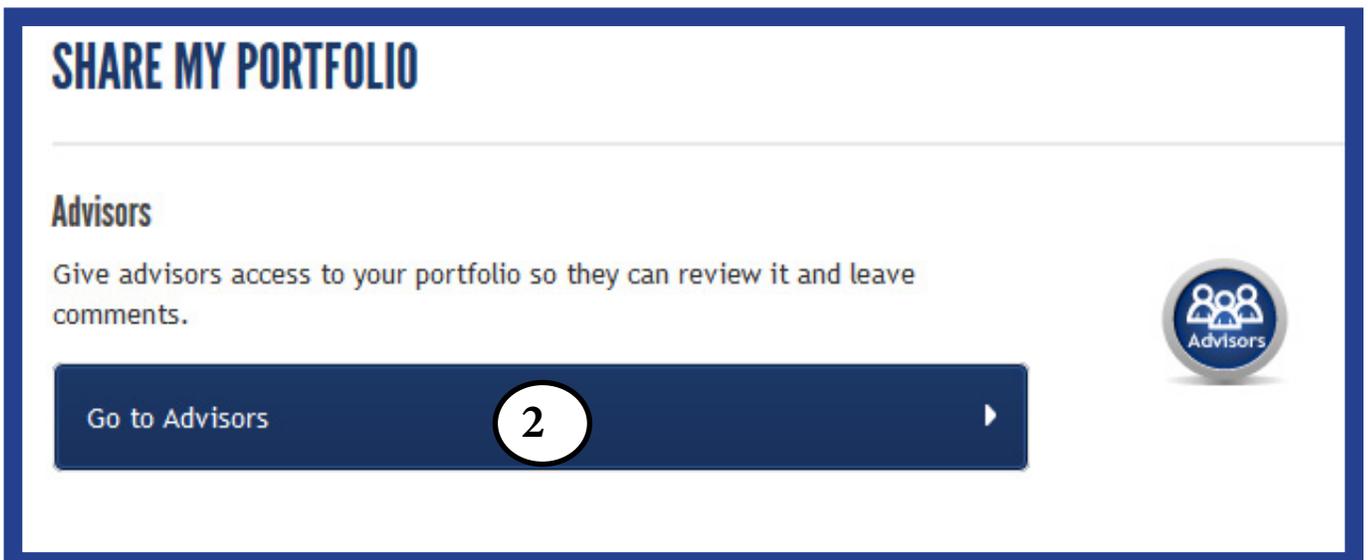
# CLIENT SELECTION OF ADVISORS

Clients are also able to choose the advisor(s) they want to view their portfolios.

1. In the upper right hand corner of the MCIS homepage, click on the arrow next to the name. Click on **Share My Portfolio**.



2. Click on **Go to Advisors**



- The advisors that are available to you are shown in the lower table. Select the advisor (s) you would like to have access to your portfolio by selecting **Add**.
- Once the advisors are added they will show up in the upper table under **Your Advisors**. You will be able to message advisors and remove them if you no longer want them as an advisor.

- Give advisors access to your portfolio so they can review it and leave comments.

### Your Advisors:

Last Name	First Name	Title	Last Login	Messages	Remove
McDowell	Donetta	MCIS Program Specialist		<a href="#">Messages</a>	<a href="#">Remove</a>

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### Advisors that are available to you:

Last Name	First Name	Title	Add
Advisor	Test		<a href="#">Add</a>
Boggs	Pam	MCIS Training & Development Specialist	<a href="#">Add</a>
Miller	Annette	Director	<a href="#">Add</a>

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