



ASQ ONLINE SETUP GUIDE

for Program Administrators and Providers

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ASQ Online Set-up Guide for Program Users

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SECTION 1: ASQ Online Overview

ASQ Online Support/Training

This guide is available to help you set up and manage your ASQ Online program. In addition to this guide, the following resources are also available to assist you.

Recorded Webinar: The following recorded webinar covers the setup and management of ASQ Online. Click on the link below to view the recorded webinar:

<https://attendee.gotowebinar.com/recording/7631566540587457793>

Tutorials: The following three video training tutorials are available within the Help section of ASQ Online (you can also access them here by clicking on the links):

[Program Administrator Tutorial](#)

[Provider Tutorial](#)

[Family Access Tutorial](#)

Quick Start Guides: Within the Help section, under the Additional Resources section, you will find Quick Reference Guides for the Program Admin, Provider, and for Family Access setup.

User Manuals: Within the Help section, under the User Manual section, you will find User Manuals for the Program Administrator and Provider roles.

Technical Support: Technical support is available 24 hours per day/7 days per week via phone at 1-866-404-9853, or via [email](#).

User roles in ASQ Online

Program Administrator (Program Directors)

Program Administrators in ASQ Online are equivalent to the Program Directors at each site. Program Administrators/Directors have access rights to create, edit, and delete users within their program, as well as generate reports. They oversee the teachers in each site. Program Administrators can create additional Program Administrators to assist them in their management of the ASQ Online program. There is no limit to the number of Program Administrators allowed in an Enterprise program.

Provider (Teachers)

Providers in ASQ Online are equivalent to the teachers at each site. Providers have access rights to create and edit child records, and enter child screening data. This role was designed for teachers who work directly with children in the program.

Program Administrator who is also a Provider

If you are a Program Administrator who also needs to enter in screening data for children whom you work with, you can add the Provider role to your Program Admin role. As a Program Administrator, you are able to access Child Profiles and review screenings,

but you do not have the access rights to add a screening into the system. If you need to be able to add a screening to a child profile, you can add Provider access to your existing Program Admin user role. By assigning Provider access to your Program Administrator role, you will be able to access both roles without having to create separate usernames and passwords.

ASQ Online Role Review

Tasks ↓	Roles in the ASQ Online System →	Program Admin	Provider
Run reports		✓	✓
Create programs			
Add child profiles		✓	✓
Print screening documents & results		✓	✓
Create program Family Access page(s)		✓	
Accept program Family Access screenings		✓	
Add screenings to online system*			✓
Create screening tasks		✓	✓

Family Access

Your ASQ Online program also comes with Family Access. Family Access is an online questionnaire completion system. Family Access allows your program to create a web page where you can direct caregivers to complete screenings for their children online. The Program Administrator is responsible for creating the Family Access URL. Once the Family Access URL is created, the Program

Admin can mark it as “shared” so other Program Administrators in the program can review and accept any screenings that come in through Family Access. See *Section 2: Creating Your Family Access Page* for more information.

Screening Preferences

The screening preferences feature provides Program Administrators the ability to set automatic screening tasks for Child Profiles, so that children are screened per the screening standards that you have established for your program. The tasks associated with the screening preferences will be created starting after midnight of the next day.

Program Administrators can set preferences so that screening tasks are automatically created for Child Profiles when:

- The child enters the program
- The child reaches a certain age
- The child is age-appropriate for the program’s recommended screening intervals
- The child needs to be re-screened based on the prior screening scores
 - o Scores below cutoff for ASQ-3 questionnaires
 - o Scores above cutoff for ASQ:SE questionnaires

For more information see *Section 2: Setting Screening Preferences* for more information.

SECTION 2: Getting Started with your Program (for the Program Administrator/Director)

Logging into ASQ Online

You should have received an email from donotreply@asqonline.com providing you with your username and steps to create a password. If you did not receive that email, please email your Account Administrator.

NEXT STEP: Entering your keycode

Entering Your Keycode

In order for a Provider to enter screening data into the system, a keycode must have been entered for your program. Keycodes can be found on the inside flap of the box of paper ASQ questionnaires. Follow the instructions below to enter in your keycode:

1. Select *Program* from the top navigation menu.
2. Scroll down to the **Keycodes** section. (If a keycode already exists, you can skip this step and go to step 3.)
3. Click the *Add* tab.
4. Type in the alphanumeric keycode exactly as it appears on the inner flap of your ASQ-3 and/or ASQ:SE questionnaire boxes.
5. Click *Save*.
6. Repeat these steps if you have more than one keycode to enter. (If you will be using ASQ-3 and ASQ:SE questionnaires in your program, you will need to enter in a keycode for both ASQ-3 and ASQ:SE.)

NEXT STEP: Adding users to your program

Adding users to your program

After making sure your keycode(s) are entered into your program, you will need to start adding users to your program. You can add your teachers as Provider users in your program.

To add your staff to your program:

1. Select *Program* from the top navigation menu.
2. Select the *Add Program User* Quick Link.
3. Enter in all required information (required fields are indicated by a red asterisk [*]).
4. Select whether this user will be a Program Administrator or Provider, from the “Role” drop-down menu.
5. When creating the username, we recommend you use the person’s first initial + last name.
6. Click *Save*.

The user will receive an automatic email from the system that includes their username and steps to create a password.

Adding Additional Access to Your User Role

When you first get started, you may only have Program Administrator access. However, if you will need to enter screening data, you will need to also have Provider access. To add that access to your existing Program Administrator role, follow these steps:

1. Select *Program* from the top navigation menu.
2. Select the *Add Provider Access* Quick Link.
3. Under the **Add Providers** tab, put a checkmark in the box to the left of your name.
4. Click the Add button.

You will now have Provider access. At the top of page, you will notice a drop-down menu is now available. You will be able to switch from your Program Administrator and Provider roles using this drop-down menu.

Note: If you need to add Program Administrator access to one of your teachers, you can select Add Program Administrator Access when you are on Step 2 (above), and select the provider to add Program Administrator access to.

NEXT STEP: Adding children to your program

Adding Children to Your Program

There are a few ways to add children to your program:

1. *Program Administrator:* The Program Administrator can add child profiles to the program, and then after they are added, the Program Admin will need to assign the children to a Provider.
2. *Provider:* The Provider can add child profiles to the program and the child profiles will then be automatically assigned to the Provider.
3. *Family Access:* When a screening is accepted through Family Access, the child profile is created in the program and assigned to the chosen provider.
4. *Import:* The Program Administrator can download the child profile import template and import child profile data from a csv file into ASQ Online.

Many times the Program Administrator creates the Providers (Teachers) and then the teachers add the children to the program. The children that the teachers add to the program will be automatically assigned to them. Program Administrators can see all child profiles in the program regardless of who enters the child profile.

To add a child profile to your program, follow these steps:

1. Select *Child Profiles* from the top navigation menu.
2. Select the *Add Child Profile* Quick Link.
3. Enter the required information (required fields are indicated by a red asterisk [*]).
4. Click *Save*.

Next, you will need to add a caregiver to the Child Profile (the caregiver is the parent or foster parent or other relative in charge of the care of this child). To add a caregiver:

1. From the child's profile page, click the **Add New Caregiver** Quick Link.
Note: If the caregiver already exists in the system, click the Add Existing Caregiver Quick Link. Under the Caregiver Profile List tab, click Add to the right of the caregiver name, and click Save.
2. Enter in the required information (required fields are indicated by a red asterisk [*]).
3. Click *Save*.

The final step in adding a Child Profile is to assign a Provider to the child. The Provider is the person in your program who will be entering the screening information for the child. A Provider must be assigned to a child in order for that child's screenings to be entered into the online system. If the Provider creates the child profile, the child will automatically be assigned to that provider. To learn how to assign a provider to a child profile, see the next step.

NEXT STEP: ASSIGNING A PROVIDER TO A CHILD PROFILE

Assigning a Provider to a Child Profile

Once a child has been added to the program by the Program Administrator, the child will need to be assigned to a provider. Children can be assigned to multiple providers. If a provider leaves or if a child is moved from one classroom to another, the child profile can be reassigned to another provider. To assign a provider to a child:

1. From the child's profile page, click the Add Provider/Reviewer Quick Link.
2. Locate the provider you would like to assign to this child from the list. Put a checkmark in the box to the left of the Provider's name.
3. Click the *Add* button.
4. The provider will now be able to access and enter screening data for that child profile.

NEXT STEP: ASSIGNING MULTIPLE CHILDREN TO A PROVIDER

Assigning Multiple Children to a Provider

If a Provider leaves and you need to assign multiple children to a new provider, you can do that following these steps:

1. Click *Program*.
2. Click *Search Program Users* from the Quick Links menu.
3. Click on the user's name.
4. Click *Assign Children to Provider* from the Quick Links menu.
5. Put a checkmark in the box to the left of the child's name.
6. Click *Add*.
7. The provider will now be able to access and enter screening data for those child profiles.

You can also assign multiple children to one Provider by going to the Providers If you need to assign multiple children to one provider, you can do so from the Provider's My Profile page

NEXT STEP: SETTING SCREENING PREFERENCES

Setting Screening Preferences

Within each child profile and within Screening Management there is a “Tasks” section. ASQ Online offers the ability for users to create screening tasks so they can remind themselves to perform future tasks for their children. You can learn more about Tasks in the **Creating Screening Task Reminders** section. ASQ Online also has the ability to automatically set the screening tasks for the child profiles in your program. To do this, you will need to add screening preferences for your program. To add screening preferences to your program:

1. Select *Program* from the top navigation menu.
2. Select the **Screening Preferences** Quick Link.
3. There are 3 different types of screening preferences, and 2 re-screening preferences.
4. Click *Add* next to the screening preference that you would like to add.
5. You have the ability to add multiple screening preferences to meet the needs of your program.

After the screening preferences are set, screening tasks will start to be generated by the program after midnight. It will only create screening tasks as a child ages into the task. For example, if you set a preference to screen every child with the 6 month interval, the task will not be created until the child ages into the 6 month interval.

NEXT STEP: CREATING YOUR FAMILY ACCESS PAGE

Creating Your Family Access Page

If you would like your parents/caregivers to complete the ASQ Online screening online, you can create a Family Access page for your program. Once you create the page, you can give the URL to your parents via email, brochure, etc. It only takes a few steps to create your Family Access page.

1. Click on *Family Access*.
2. Under **Create Web Page**, click on the questionnaire link to start creating your Family Access page.
3. Enter information into all of the required fields. You are able to paste text into each field from another document.

4. If you will need other Program Administrators in your program to review and accept incoming screenings, then you will need to make sure you mark the page as “Shared” (at the bottom of the page).
5. Once you have entered in all of your information, click Update.
6. You will land on the Family Access page and will see your Family Access URL.
7. Your teachers can now provide this URL to your parents/caregivers for online screening completion.
8. After a screening is completed online, the screenings will come into the program for review and acceptance. Only the Program Admin can accept the incoming screenings. If you have multiple program administrators in your program and they also need to accept incoming screenings, you will have to make sure your Family Access page is marked as “Shared”.

There is a **Family Access Tutorial** and a **Family Access Quick Start Guide** available in the **Help** section. (The **Help** section can be found on every page under **Quick Links**.)

NEXT STEP: SETTING UP FAMILY ACCESS ALERTS

Setting Up Family Access Alerts

Family Access alerts allow you to pick a day, time, and frequency that you would like to receive an alert that a screening has been submitted, via Family Access, to be approved or rejected. You can choose to receive this alert via text message, email, or both. Family Access alerts will not alert you each time a screening has been submitted, but will simply alert you of any screenings that have been submitted according to the specified time frame you have selected.

For example, if you select that you would like to receive a text message each day at 10AM, you will only receive that message once, at 10AM, daily. The message will let you know how many screenings have been submitted for you to approve or reject, up to that time. Say that 100 screenings have been submitted. You will not receive 100 alerts; you will receive one alert message informing you that 100 screenings have been submitted for you to review/accept

To set Family Access alerts, follow these steps:

1. Click on *My Profile*.
2. Click on *My Alerts* from **Quick Links** menu.
3. Scroll down to the **Family Access Alerts** section and select your alerts.
4. Make sure to change the Status to *On* after creating the alerts.
5. After you create the alerts, scroll down to the bottom of the page and click *Save Changes*.

NEXT STEP: RUNNING REPORTS

Running Reports

Within ASQ Online, there are multiple reports you can generate, pulling together aggregate data from your program. You can choose to download these reports as PDF files, CSV files, or you can preview the report in a separate browser window.

When running reports, there are many ways to generate any one report so that it includes as much or as little information as you would like. Each report has its own set of criteria that can be narrowed down to include the information most relevant to your report. You can also include child profile custom fields in the report by selecting that option. These criteria are listed on the report generation page as fields or drop-down menus. Leaving a field or drop-down menu blank, prior to generating a report, indicates that you would like to see all data pertaining to that field.

To run any report within ASQ Online:

1. Select *Reports* from the top navigation menu.
2. Click on the name of the report you wish to run.
3. Select your report generation criteria.
4. Click *Generate Report*. The page will display a “report status” while the report is being processed.
5. Three report generation options will appear: Download PDF, Download CSV, or Preview Report. Select the report generation option that you would like to run.

SECTION 3: Information for Providers (Teachers) *(and Program Administrators with Provider Access)*

Logging into ASQ Online

You should have received an email from donotreply@asqonline.com providing you with your username and steps to create a password. If you did not receive that email, please email your Program Administrator.

Adding Children to Your Program

To add a child profile to your program, follow these steps:

1. Select *Child Profiles* from the top navigation menu.
2. Select the *Add Child Profile* Quick Link.
3. Enter the required information (required fields are indicated by a red asterisk [*]).
4. Click *Save*.

Next, you will need to add a caregiver to the Child Profile (the caregiver is the parent or foster parent or other relative in charge of the care of this child). To add a caregiver:

1. From the child's profile page, click the **Add New Caregiver** Quick Link.

Note: If the caregiver already exists in the system, click the Add Existing Caregiver Quick Link. Under the Caregiver Profile List tab, click Add to the right of the caregiver name, and click Save.

2. Enter in the required information (required fields are indicated by a red asterisk [*]).
3. Click *Save*.

Adding ASQ Questionnaires to your ASQ Online Program

There are many ways a screening can be entered into ASQ Online:

1. Manually: The provider can log in and enter a screening into ASQ Online.
2. Family Access: A parent/caregiver can click on the Family Access link and add a screening through Family Access that is later accepted by the Program Administrator into the program.
3. Import: The Program Administrator can download the screening import template and import screening data from a csv file into ASQ Online.

Screening data can only be entered into the system as a Provider. If you are the Program Admin and need to add screening data for a Child Profile, you must switch to your Provider role. If you have a completed paper questionnaire (a prior ASQ or more current ASQ) that needs to be entered into ASQ Online, you can add it by following these steps:

1. Select *Child Profiles* from the top navigation menu.
2. Select the name of the child to whom you would like to add screening data.
3. From the child's profile, click the *Add Screening* Quick Link. (NOTE: If you have not uploaded a consent form to the child's profile, a message will appear that says "This child does not have a consent form on file. Is it OK to continue?" You can still enter the screening without a consent form, by clicking OK.)
 - a. Select the caregiver who completed the screening from the drop-down menu.
 - b. Select the questionnaire type from the drop-down menu.
 - c. Select either the *Long* or *Short Form*. (The Long Form looks just like the paper questionnaire, but without the pictures. The

Short Form has only the spaces to enter the answers and is intended for quick and easy data entry.)

d. Enter the screening date. ASQ Online will then recommend the interval.

e. Click *Save*.

4. Fill out each area of the questionnaire. When finished, click *Save in Progress*. Then click the *Finalize* button.

5. Once finalized, the Information Summary Sheet will appear and the questionnaire will be available within the **Child Screenings** section of the child profile.

Printing a Blank ASQ-3 Questionnaire

If you know what questionnaire interval to use for a child, and just need to print out a blank questionnaire, you can do so by following these steps:

1. Click on *Screening Management*.
2. Under the left-sided **Quick Links** section, find the **Documents** section.
3. Under the **Documents** section, click *View/Print Documents*.
4. Click *Download* to the right of the **ASQ-3 English Questionnaire** document.
5. All of the intervals will appear for printing. Click on the interval that you would like to print.
6. The document will download as a PDF for you to print from your computer.
7. You can now use this questionnaire to complete the screening or you can provide to the appropriate person to complete the screening with the child.
8. Once the questionnaire is complete, it can be entered into ASQ Online by the Provider.

Printing a Blank ASQ-3 Questionnaire with Child's Demographic Info

If you would like to print a blank questionnaire with the child's demographic info, you can do so by following the instructions below. This step is also helpful if you do not know which questionnaire interval to use for a child as you can print out the recommended

interval for a specific child using these steps. We will be using screening packets in Screening Management to print these blank questionnaires. Follow these steps:

1. Click on *Screening Management*.
2. Under the left-sided **Quick Links** section, find the **Packets** section.
3. Under the **Packets** section, click *View/Print Packets*.
4. The first packet listed under **System Packets** is **ASQ-3 English Questionnaire**. This will be the packet we print.
5. Click *Generate* to the right of the **ASQ-3 English Questionnaire** packet.
6. Click on the Child Profiles tab.
7. Find the child profile that you want to print the questionnaire for and click *Download* to the right of the child's name.
8. After it runs, click *Download File*.
9. The appropriate questionnaire interval will print and the child's demographic information will be printed on the blank questionnaire.
10. You can now use this questionnaire to complete the screening or you can provide to the appropriate person to complete the screening with the child.
11. Once the questionnaire is complete, it can be entered into ASQ Online by the Provider.

Knowing When an ASQ Screening is Due

If your program has Screening Preferences setup, the screening tasks that were auto-created by the ASQ Online program will appear under Screening Management. To see what screening tasks were auto-created by the screening preferences, follow these steps:

1. Click on *Screening Management*.
2. The screening tasks that were created can be found under **Screenings Due**. The **Screenings Due** section is available in the middle of the **Screening Management** page and is also available on the left-sided **Quick Links** menu under the **Screenings** section. Click on the *Screenings Due* link or click on the *View All* tab in the **Screenings Due** section in the middle of the page.
3. Screening tasks that are due will be listed in order by Due Date.

4. If there is a screening task due that you would like to print the questionnaire for, you should click on the View/Print Packets link on the left-sided Quick Links menu under Packets, so you can print the questionnaire.
5. On the packets page, click Generate to the left of the ASQ-3 English Questionnaire packet.
6. Search for the child in the Screenings Due section and download to the right of the child's name.
7. After it runs, click Download File to print the blank questionnaire. The appropriate interval will print for the child.
8. You can now use this questionnaire to complete the screening or you can provide to the appropriate person to complete the screening with the child.
9. Once the questionnaire is complete, it can be entered into ASQ Online by the Provider.

Creating Screening Task Reminders

If your program does not currently have screening preferences set up, but you would like to create your own screening task reminders, you can do so by following the steps below. Screening tasks can be created from the Tasks section within a child profile or from the Screenings section within Screening Management. Creating a screening task will help to remind you when to rescreen a child. When you create the task, the system will tell you what the recommended interval is for the date that you schedule your screening task.

Follow these steps to create a screening task:

1. Click on *Screening Management*.
2. Click *Schedule Screening* under the **Screenings** section in the left-sided **Quick Links**.
3. Select *Screening* as your **Task Type** from the dropdown menu.
4. Select the child's name from the dropdown list.
5. Enter in the due date.
6. After the due date is entered, the recommended interval will appear.
7. Enter in a description if you'd like, and then click *Save*.

Note: The **Completed Date** field will be auto-completed by the system when you print the questionnaire from the **Packets** section (and then the screening task will appear in the **Screenings Out** section in **Screening Management**). The **Returned Date** field will be auto-completed by the system after you enter the questionnaire into the ASQ Online program (the screening task will appear in the **Screenings Completed** section in **Screening Management**.)

To summarize, here is the life of your screening task: Create the screening task; it appears under **Screenings Due**; when task becomes due, you print out the questionnaire from the **Packets** section and the screening task moves from **Screenings Due** to **Screenings Out**; the screening is completed by you or the parent, and once it is entered into ASQ Online, the screening task moves from **Screenings Out** to **Screenings Completed**.

Setting up Alerts

As a Provider, you have the ability to set up alerts for your screening tasks which can be sent to yourself via text message or email. To set up a screening task alert, follow these steps:

1. Click on My Profile.
2. Click My Alerts from the Quick Links menu.
3. Under the Task Reminders section, the type of reminder, when you should receive the reminder, and then select Screening from the task type dropdown menu and then click Add.
4. The alert will appear. Make sure you select the Status as "On". You can create as many alerts as you would like.

Running Reports

Within ASQ Online, there are multiple reports you can generate for the children to whom you are assigned. You can choose to download these reports as PDF files, CSV files, or you can preview the report in a separate browser window.

When running reports, there are many ways to generate any one report so that it includes as much or as little information as you would like. Each report has its own set of criteria that can be narrowed down to include the information most relevant to your report. You can also include child profile custom fields in the report by selecting that option. These criteria are listed on the report generation page as fields or drop-down menus. Leaving a field or drop-down menu blank, prior to generating a report, indicates that you would like to see all data pertaining to that field.

To run any report within ASQ Online:

1. Select *Reports* from the top navigation menu.
2. Click on the name of the report you wish to run.
3. Select your report generation criteria.
4. Click *Generate Report*. The page will display a “report status” while the report is being processed.
5. Three report generation options will appear: Download PDF, Download CSV, or Preview Report. Select the report generation option that you would like to run.

If you have a large amount of data, the report may take a little longer to run. Once you have started to run a report, you can leave the page and continue your work in ASQ Online. To check the status of the report, you can select the “Recent Reports” tab on the **Reports** page. Once the report has finished running, you can then download it from this page as well.