Assigning a Client a Token on RecoveryZone.com

Topics Covered:
1. Assigning a Token to a “Repeat” Client
2. Adding a NEW Client Identifier for a NEW Client
3. To Update or Correct a Client ID

Assigning a Token to a “Repeat” Client
This procedure should be followed if you are assigning a token (or assessment) to a client that you have previously assigned an assessment to. Note: It does not matter if it is the same assessment as before, you always want to use the same unique client ID for a client every time.

Steps:
If you are following along with the video, the steps match the video beginning at 1:15.

1. Go to http://www.recoveryzone.com (if you live in Canada, please use the Canadian site)
2. Click on Therapist Access in the lower right corner of the screen (you may have to scroll down a bit)
3. Enter your assigned Username and Password, click log in
4. Once you are in the Therapist Gateway, under Test to assign: click on the dropdown arrow and then click on the test you want to assign.
5. Under **Unique client ID**: click on the dropdown arrow and select the client identifier for your client.

6. Click **redeem token** to assign the assessment to the selected client.
7. Your screen should look like this, with the red writing telling you what assessment was assigned to what client ID.

8. If you scroll down on your screen, you will see the assessment has been assigned and is available for the client to take it.
Adding a NEW client identifier for a NEW client
This is the process to create a new client identifier and then assign a token. You should only use this process for clients who have never taken an assessment on RecoveryZone.com with you before. Remember to not use any identifying client information (DOB, name, social security number, etc.) when creating a new identifier. This protects both you and the client!

Steps:
If you are following along with the video, the steps begin at approximately 2 minutes.

1. Repeat steps 1 through 3 in Assigning a Token to a “Repeat” Client
2. Click on Add New Client Id: as shown below

3. You will see a pop-up box appear as shown below.

4. In the Unique client ID: text box, enter in the ID you created
5. Click on Submit

6. Now you can see the new identifier in the **Unique client ID:** dropdown

7. Select the new **Unique client ID** by highlighting and then clicking on that ID
8. Select the assessment you want to assign in the **Test to assign** dropdown box by highlighting on the assessment and then clicking it.

![Select Assessment](image)

9. Click on **redeem token** to complete the process and assign the assessment to the client.

![Redeem Token](image)
10. You can now scroll down on the page and verify the assessment has been assigned and is ready for the client to begin taking it.

To Update or Correct a Client ID
You will use this process if you incorrectly typed in a client ID, if you created a new ID for a client who already had a previous client ID, or any other error.

Steps:
If you are following along with the video, the steps begin at approximately 3:10.

1. Locate the **Client Identifier** that needs to be changed or corrected and click on it.
2. A pop-up box will appear that contains the current client ID.

![Image of pop-up box with client ID]

3. Correct the client ID by clicking at the end of the ID, using backspace to delete, and then typing in the new client ID.

4. Click **Change the ID above and click here** to accept your changes. If you made an error, repeat step 3 or click **cancel**.

![Image of client ID update process]

5. The **client ID** has been successfully updated.

**NOTE:** If you are changing the ID to match a previous ID for a client, the assessments will NOT merge. The important thing is that researchers will be able to match the client IDs when compiling data. Thank you!