Minnesota Career Information System

Training Manual

https://mncis.intocareers.org

For more information about Minnesota Career Information System (MCIS) contact: Dorothy Wolf, MCIS Training Specialist, dorothy.wolf@state.mn.us, 651.582.8475
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Lesson 1: The MCIS Portal Page

Objective - To familiarize you with the MCIS Portal Page

The MCIS Portal Page contains information about MCIS and important links. It is your starting point for MCIS. Bookmark this page using your browser’s bookmarking feature. From this page, you can:

1. Sign-in to MCIS using an individual portfolio user name and password; the site’s user name and password; or your administration name and password.

2. Learn about various MCIS versions, products, and marketing flyers/brochures.

3. Find answers to technical and other frequently asked questions about MCIS.

4. Learn about what has been added to MCIS for the year (“What’s New”).

5. Find materials and resources for using MCIS and training others in MCIS usage.

6. Print an order form for ordering MCIS premium features and supplemental products.

7. Learn how to contact staff at MCIS.

8. Link to training information.

9. Access Administration Tools using the Administration or staff username and password.

By familiarizing yourself with the MCIS Portal Page tools, you will learn a great deal about the Career Information System. The Portal Page tools also provide shortcuts to the various resources and materials within.
Assignment
Go the MCIS Portal Page: http://www.mncis.intocareers.org/ and:

☐ Review each of the Portal Tools thoroughly.

☐ Log into MCIS using your user name and password. If you do not know your user name and password, I will supply one for today.

☐ View and create a portfolio using either the MCIS Portfolio Quick Start or the tutorial titled "Creating Your Portfolio" under Tools for Users in the footer area of the MCIS home page.
Lesson 2: The MCIS Homepage
Objective - To familiarize you with the MCIS Homepage

The home page is where users begin their use of MCIS. The MCIS logo is on the upper left and appears there on most MCIS pages. When clicked, it *always* returns the user to this homepage. The site name appears on the top right and includes the name of the school or site.

The user bar sits right below that, and it contains first name of the user, if the user logged into MCIS with their portfolio username and password. If a user has *not* signed in with a personal username and password, the account settings link in the pull down menu allows the user to create or edit portfolio information and share his or her portfolio. The user bar also informs the user about unopened messages and provides a logout link.

The user badge allows instant access to the user’s portfolio, as does the horizontal global navigation bar across the upper part of this page. Click any tab to see the mega menu overview of the contents in MCIS for this topic. You can also click the tab and read a more lengthy description of the contents in each tab.
From the MCIS homepage, you can access any of the content or tools in MCIS. We believe that our users come to career development from a milieu of perspectives, career developmental needs and with varying concerns and interests. Our home page allows users to begin the career development process where they wish.

Because MCIS is a system, the content is methodically interconnected. For example, when you are viewing Occupations, you will be able to link directly to the Related Occupations and Programs of Study. When you complete an assessment, you will be able to link directly to those Occupations most associated with your assessment results.

**Assignment**

Go the MCIS homepage and briefly explore an area
Lesson 3: Key Theories Used in MCIS - Intro to My Career Plan

First, Frank Parsons articulated a model of career development early in 1906 that continues to influence contemporary career development, including MCIS, today. His model can be portrayed as a three-step process.

1. Know yourself: MCIS contains sorting and assessment tools that help develop self-knowledge;

2. Know your options (about the world of work and education): MCIS has encyclopedic areas of content-- under Occupations & Employment (used for career exploration, career-related research, and the job search process) and in Education & Training (used for education and school exploration, career pathway exploration, and financial aid); and

3. Bridge the two: MCIS contains three sorting tools that help users bridge what they know about themselves with what information analysts know about occupations, schools, and scholarships. MCIS also uses a personal portfolio, called the My Portfolio, to help users bridge learning, write reflections, save content and document academic, career and personal growth.

Along with all of the above MCIS has My Career Plan, which helps users know themselves, know and evaluate their options, set goals, make plans, and reflect upon these decisions and plans.

My Career Plan

The Career Plan is a process tool that allows users to extract more meaning from the content they discover and place the information in a context of what is important to them. In career development, this process is not a one-time event, rather it flows cyclically. Users repeat the process as they grow and mature, ideally annually. Users may enter this process at three different levels and with five distinct goals; the Career Plan logo below portrays these five goals.

The activities in The Career Plan constitute a developmentally organized curriculum. The three levels correspond to grade levels:

1. Getting Started (grades 8-9)
2. Looking Deeper (grades 10-11)
3. Next Steps (grade 12)

These activities have been designed to be used to meet the new career guidance graduation requirements many states have implemented and include self-directed lessons to teach users how to analyze and synthesize information, as well as to plan, make decisions, set goals, and develop problem-solving strategies and skills throughout these three time periods.
The Career Plan is a tool for users to document and reflect upon their career development across time. It includes notes to self and reflections to help users analyze and synthesize their career and education research. The Career Plan also allows users to save content, links, and their assessment results.

**Assignment**

- See if you can find a resource in MCIS that helps users:
  1. Know themselves
  2. Learn about their options
  3. Bridge the two

- Explore My Career Plan. Click on Plan on the red mega menu. Click on Career Plan. Open the Getting Started section of The Career Plan and explore the contents of each section (Know Myself, Research Options, etc.)
Lesson 4: Using and Interpreting Assessments in MCIS

Assessments help users learn more about themselves. For example, if you are wondering if you would like to work as a chef, you could job shadow a chef for a few days to informally assess your question.

If you are planning to use a MCIS assessment with your users, remember it is your responsibility to familiarize yourself well with the assessment, prepare your users to take the career assessment, and prepare to interpret the results well. The assessment experience will be most meaningful if users understand what they are doing and why they are doing it. The MCIS Tools for Counselors and Teachers has downloadable counselor manuals, activities, and instructional support handouts to help you. Be sure to read these.

Let’s take a closer look at the formal assessments in MCIS, typically found under the Assessments tab on the MCIS homepage.

INTERESTS
Interest inventories are often the first type of assessment used for those who are new to career development. These instruments measure interests as they relate to occupations. The results display a list of occupations that match the users’ interests. CIS has three interest inventories:

*Career Cluster Inventory*
This 80-item survey of interests targets the younger user (grades 6-8) or the user with limited English proficiency or reading skills. Reading is at a 6th grade level. Results are displayed using the 16 National Career Clusters. Cluster results link to occupations.

*IDEAS Assessment (optional)*
The results of IDEAS include a graphical display and a list of clusters of occupations that
best fit the interests the user identified by scoring 128 statements by how well they might like an activity. Language in IDEAS is controlled at a 6th-grade reading level. IDEAS is available in English and Spanish.

InterestProfiler
The result of the Interest Profiler is a list of occupations that best fit the interests the person identified by scoring 180 statements according to how well the user might like each activity. Language is controlled at an 8th-grade reading level.

SKILLS
Skills are key to job satisfaction, so identifying occupations that use skills that users find satisfying is important.

This assessment helps users recognize skills they enjoy and learn how these skills transfer between occupations. SKILLS can be used to select occupations to explore, identify ways to modify your career direction, or prepare for a job interview. SKILLS is a self-assessment tool. It begins with a skills selection process. Users can use the SKILLS worksheet or cards to review the list of 72 skills and select their preferences. SKILLS rates skills in several ways. It lists the “Top 30 Occupations” that best match the user’s skills. It calculates a Holland Personality Type based on those skill preferences. It rates users’ skills to clusters of occupations. SKILLS also lets users compare their skills to the skills required by any occupation.

VALUES
Work values assessments are very useful for the user who has had enough experience (paid or unpaid) with the world of work to know the work values they find important. For the user beginning career exploration, learning about work values can often prompt interest in career exploration.

Work Importance Locator
This assessment surveys work-related needs to identify work values. The outcome of The Work Importance Locator is a list of occupations that best fit the needs and values the person prioritized. To use the assessment, users rank twenty different aspects of work values, such as achievement, autonomy, and conditions of work.

ASSESSMENT LINK
MCIS also contains an Assessment Link that links the occupations or occupation categories resulting from an assessment instrument to the occupations in MCIS. Before using Assessment Link, the user needs to:

1. Take the test.
2. Get the results.
3. Have a counselor or other trained professional explain the results.

The following assessment results can be cross-walked to occupations in MCIS using the Assessment Link:

- Armed Services Vocational Aptitude Battery (ASVAB)
Entrepreneurial Career Assessment Form
In addition, the Entrepreneurial Career Assessment form, an informal measure of a person's likeliness to succeed within self-employment ventures, is found under Occupations & Employment. This 20-item assessment can be saved to the My Sorts & Assessments section of the portfolio, like the other assessments.

Reality Check: Helps users sort through the lifestyle factors they want, then, identifies occupations that match these preferences. Reality Check can be used in three ways: the user can select various lifestyle options then see occupations that are available based upon the costs of these choices; the user can begin with the salary they want to earn and find occupations that match this salary, and the user can begin with an occupation and view the lifestyle items that can be purchased with the salary of the chosen occupation. Begin by clicking Reality Check from the homepage, which takes you to the introduction shown to the right (1). Next, watch the video (2) and select the version you want to use, as discussed above.
Interpreting Assessments Results with MCIS

Career assessment results do not tell a person what occupations they should or should not pursue. Instead, the results provide a way for the user to look at the world of work based upon the personal characteristics the instrument is measuring.

After users receive the results of an assessment in MCIS, they need an opportunity to discuss what these results mean to them. They also need a strategy for applying these results to their career planning. If they don’t agree with a result, or can’t understand it, they will need assistance in learning from that experience. My Portfolio contains a section called Sorts and Assessments for recording assessment results and the user's reflections about these results. This is a useful tool, making the assessment process more meaningful over time.

Exploring the occupations that result from assessments helps users learn more about themselves (why they like or dislike an occupation), as well as improve their information gathering, analysis, synthesis, decision-making, and goal-setting skills. Most MCIS assessments use John Holland’s typology to present the assessment results.

Combined Report of Assessments

This report will give the user a crosswalk of occupation list results from various assessments that they have taken and show which occupations appear on multiple assessment results. Users can select from two report options: “Default,” which automatically selects the most recent version of every assessment the user has taken, and “Advanced”, which allows the user to select which assessment results to include in the report. Features of the updated report include:

- Ability to view results by Occupation Cluster or by Occupation Count
- Ability to navigate to occupation descriptions by simply clicking on an occupation title
- Ability to save occupations on the report to Favorites by selecting the checkbox to the left of the occupation title
- A gold star appears next to occupations already saved to the user’s Favorites
- Enhanced introductory instructional text
Assignment

- Use either the MCIS tutorial for the Career Cluster Inventory or SKILLS. Think: How might you use these tutorials?
- Use two assessments found in MCIS. Read and follow the instructions provided. Be sure to save your results and thoughts.
- From the portfolio tab, choose “Combined Report of Assessments,” follow the screen instructions and view your report.
Lesson 5: Informal Assessments

Learning Styles and Employability Skills with associated lesson plans are available in the MCIS Curriculum. Link directly to these lessons within Tools for Counselor & Teachers, Classroom Activities, Learning Activities.

- **Learning Styles Survey Activity**
  Students identify their learning styles through a survey and then discuss study strategies that can help them learn best, including note-taking strategies.

- **Employability Skills Survey Activity**
  Students identify their employability skills by completing a survey and then discuss strategies to help them develop these skills.

The Learning Styles Survey and Study Tips Worksheet, and the Employability Skills Survey are available for students in MCIS under Tools for Users\Support Materials\Assessment Tools. Both can be saved in the student's portfolio.

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### Learning Styles Survey

This survey can help you identify the ways you learn best. You will also learn study tips for your learning style. This can help you study and thus, learn better. When you are in the world of work—just like in school—you will learn new things often.

**Instructions:** For each item below, write the point value in the cell that best describes you. For example: if you answer **Often** to Item #1, place a 5 under **Often** in row #1. Be honest about your answers. Your answers will help you learn about how you learn.

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Often 5 points</th>
<th>Sometimes 3 points</th>
<th>Not Often 1 point</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Can remember more after my teacher tells me about a subject at the front of the class.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Like to have information written down on the board, in a book, or on a piece of paper.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Like to write things down or take notes to help me remember information.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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### Employability Skills Survey

This Employability Skills Survey lists the individual skills and talents that employers value. Read the list and assess your own strengths. Mark each box that best describes your level of skill. Note your best employability skills and those skills you need to improve at the bottom of the survey. Also note how you might build those skills needing improvement.

1 (needs development) = 2 (competent) = 3 (proficient) = 4 (advanced)

<table>
<thead>
<tr>
<th>Skill</th>
<th>Needs Development</th>
<th>Competent</th>
<th>Proficient</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speak clearly, audibly and distinctly.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speak clearly and use language appropriate to the audience.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Express complex ideas in an organized and concise manner.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Present effectively to a group using well-organized format, effective language, and visual aids.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lesson 6: Learning about MCIS Content

MCIS contains two types of resources to help users learn about their career options: content areas and sorts. The content areas are literally information banks organized by topic. The sorts help users sort through the content in order to begin exploring options. MCIS contains nine content areas. These content areas provide a comprehensive view of work and education in Minnesota and in the nation. Each area contains a veritable "encyclopedia" of information on that topic. Clicking on any one of these areas takes you to an alphabetical index of titles or to a cluster view. Content areas in MCIS are all found on the top horizontal menu bar on the homepage under the “Occupations” “Education,” and “Employment” headers.

Moving Around Content Areas

MCIS content has a consistent structure. The tabs across the top of the screen show users what types of content can be found within that tab. There can be a total of six tabs in each area.

The Choosing an Occupation tab contains sources for the content and presents answers to several frequently asked questions associated with the topic.

The Cluster Index tab presents the information around various clusters related to that area, such as the 16 Career Clusters.

The Title Index tab lists all content by title.
The **Compare** tab contains a tool that helps users compare two occupations or three schools side-by-side.

The **Search** tab contains a tool that helps users sort through all the content using a keyword.

**Occupations**

**Occupations and Choosing an Occupation:** An occupation is a group of jobs with common tasks. Occupations are found at more than one organization. Middle and high school users use Occupations to help them learn more about their dream occupations, plan high school coursework, and find professional organizations and resources that can provide additional guidance for career-related learning. Adults often use Occupations to find preparation requirements, licensing requirements, wages, outlook information, physical demands, and to see if there are barriers to working in the occupation. Users can watch videos and read interviews of people working in the occupations. Choosing an Occupation provides pertinent information to help the user think about things to consider when selecting an occupation or career.

**Green Jobs:** MCIS includes information on seventy-one green jobs, occupations that impact the environment in positive ways, such as saving energy or recycling and reusing goods. In addition, the green jobs information contains videos about six important industrial sectors creating green jobs. Individuals might use the green jobs file when seeking a career or occupation that helps care for the earth and a filter sorting tool that allows you to rapidly sort green jobs based on wages and educational requirements.
Industries and About Industries: An industry is a group of occupations that target a common goal, such as construction. Industries are made of groups of occupations that produce similar goods or services. Students can use industry information to track market trends, research business activity and learn about related occupations. About Industries introduces students to the components that comprise an industry.

Occupation Sort and Occupation Filter (see next chapter for information on these sorting tools.)

Military Occupations and About the Military: The military is actually a large industry with many occupations. Although the content in Military Employment functions similarly to the content in Occupations, direct comparisons cannot be made because much of the content, such as benefits and wages, is calculated differently. Veterans often view the Military Occupation Codes (MOCs) to connect their branch specialties to civilian occupations and to identify transferrable skills. Users interested in the military should research military occupations to view objective and unbiased career information. Instruct them to read About the Military to learn more about the realities of military work life, to consider if the military fits their needs, and to learn about any special requirements by branch.

Education
Programs of Study and About Programs of Study: A program of study is a sequence of courses that leads to a degree or certificate. At colleges and universities, programs of study are called "majors." This content area connects occupations to schools that provide training and to scholarships related to that training. You can view admissions requirements to certain programs (e.g., some nursing programs have admissions requirements beyond that of the school admissions requirements). You can also discover unique information about programs that interest you.

Minnesota Schools and Choosing a School: MCIS surveys schools to collect current data on their programs of study, cost and financial aid, school setting, special programs, and contact information. Minnesota Schools includes private trade and technical schools registered with the state, as well as all universities, colleges, and community colleges. Links to electronic applications are provided, when these applications exist. Users can compare schools, including admissions requirements, costs, general information, graduate study information and program information. Users can also generate an automatic letter to schools, requesting a catalog, financial aid information, and admissions forms. Choosing a school helps you learn how to make better college choices.

US Colleges & Universities: US Colleges & Universities includes all two- and four-year institutions in the U.S. with the same topics found in Minnesota Schools. MCIS purchases this database, and it might be more likely to contain errors than Minnesota Schools. For those interested in attending an in-state school, it is recommended that you use Minnesota Schools.

Compare Schools: Sometimes it helps to compare school information. This tool helps you view information for up to three Minnesota or national schools side by side.

Financial Aid: Financial aid contains both scholarship and paying for school content. There is a great deal of content about the financial aid process, paying for college, and links to state and federal aid sites. Most of the scholarship content relates to local, state, and national scholarships and grants available to prospective users. The search function is particularly useful here, for identifying a list of scholarships specific to a particular characteristic, interest, or talent.

Financial Aid Sort, Undergraduate School Sort and Graduate School Sort: These three sorting programs allow you to sort through pertinent content to more readily find what you need. Generate a list of financial aid awards and schools that match you.

Paying for School: Find detailed information about scholarships and grants, how to apply for financial aid, aid calculators, filing the FAFSA and more.
Employment

Resume Creator: Users complete a thorough job application data sheet that can then be transformed into four resume styles or the user can create a custom resume.

Saved and Uploaded Resumes: Allows the user to upload and save resumes created outside MCIS.

Job Search: Job Search contains ten comprehensive job search topics plus resources, tips, and an overview. Activities and videos are integrated into several topics to support user and client work throughout the job search process. Sample resumes and interview questions and possible answers to these questions are also provided. These topics can teach the user how to conduct an informational interview and practice interview strategies. Content on the soft skills employers want is presented along with tips for special groups, including workers with a disability, younger workers, veterans, and ex-offenders.

Entrepreneurial Career Assessment and Self-Employment: Self-employment includes substantive content about being self-employed and a self-employment quiz, The Entrepreneurial Career Assessment Form, designed to help users evaluate whether they have what it takes to be their own boss. Self-Employment can be useful when considering if self-employment is right for an individual. An at-risk youth might see a reason to stay in school, for example.

Job Success: This section contains skill-building content and activities to help users develop good work habits, improve themselves, deal with others and deal with problem situations. This content area includes fillable, savable, and accessible worksheets for those MCIS users who use screen readers (visually impaired).
**Assignment**

- Beginning with an occupation of interest, explore all of the topics associated with this occupation, leading you to a related program of study, related school and a scholarship related to your program of study interest. Explore each content area thoroughly. As a guide see Career Exploration Worksheets 1 and 2 at the end of this workbook.

**Lesson 7: MCIS Sorting Tools**

MCIS sorting tools help users explore the world of work and education in the context of knowing who they are and what they want. Using MCIS sorting tools, users apply what they know about themselves to choose factors that will help them identify content that is important to them and, hopefully, expand their options. MCIS contains four sorting tools:

1. Occupation Sort
2. School Sort
3. Financial Aid Sort
4. Occupation Filter

These sorts are the only place in MCIS where individuals can have no (zero) results; this will occur when the factors selected are too narrow and/or when one factor cancels another out. All sorts, with the exception of Graduate School Sort, are integrated into the Career Plan for 8th-12th grade users. My Portfolio is the MCIS resource that stores evidence that a student has met the career-related requirements for their Personal Learning Plan.

MCIS includes several tools, quick starts and tutorials to help those who use these sorting tools. The quick starts and tutorials are now found on the opening page of each sorting tool.

**Occupation Sort:**

Uses 28 factors, identified by career development professionals as highly useful in career decision making. It is a process-driven experience that applies career decision making and choice theory, and it is not *strictly* a Sort but a hybrid tool. Individuals can prioritize factors, create an acceptable range for each factor, and compromise. Once results are generated, users may also change their minds, learn why an occupation was eliminated from the list, and then generate new results. Below you see (1) the Getting Started (instructional) screen and (2) the Select and Prioritize Factors screen for Occupation Sort.
The **Occupation Filter** allows the user to sort through occupations on factors of importance: median wages, years of education required, and “green.” Select the filter tab when you link to Occupations, then select factors that are important then. Click Get Results at any time. Lists can be organized by any factor and criteria can be changed once lists are viewed to modify results. Filter sorting is an instructional resource that quickly shows occupational characteristics for factors of importance for users. See the filter sort landing page below and a sample results page. Access the Occupation Filter from the Occupations tab.
School Sort: Is accessed from the home page, under the Education & Training Header. This sorting tool includes two sorting tools, the Undergraduate School sort and the Graduate School Sort. Undergraduate School Sort locates two and four-year schools that match characteristics that a user identifies as important. Undergraduate School Sort uses several topics considered important in school choice. Users can search schools that offer any majors they wish to explore. Identifying the school that offers the major you desire can reduce transfer rates and education costs.

Although all private career schools are included in Minnesota Schools, private career schools are not included in Undergraduate School Sort. The screen to the left shows the School Sort instruction page, including directions use. The Graduate School Sort works much like Undergraduate School Sort. It is accessed via the School sort link, listed under the Education tab on the top of the home page. Graduate School Sort locates graduate schools that match characteristics an individual identifies as important. Graduate School Sort uses just five characteristics often considered important in school choice.
Financial Aid Sort: Locates local, regional, state, and national scholarships and grants that match characteristics an individual identifies as important. Financial Aid Sort uses ten sorting characteristics. It is recommended that users do multiple sorts. For example, sorts based upon the month the scholarship application is due or sorts based on specific majors of interest.

The results of Financial Aid Sort are **inclusive** rather than **exclusive**; users' selections add items to their lists. (As recommended earlier, consider using the “Search” function in Financial Aid for shorter lists.) Users can elect to answer all characteristics to generate a more targeted list. Access Financial Aid Sort on the MCIS Homepage, under the Education tab. The screen above shows the sorting instructions, which work identically to the instructions in the School Sort described above.

**Assignment**
- View the Occupation Sort tutorial and the quick starts for School Sort, Financial Aid Sort or Occupation Sort.
- Try out at least two sorting tools and the Occupation Filter Sort in MCIS.
Lesson 8: The Integrated and Systematic Nature of MCIS

MCIS is a system of career information. In a system all parts are connected. The integrated system in MCIS facilitates decision-making. When a user seamlessly transitions from one piece of important content to another, their thoughts are able to flow with the decision-making process. The example below shows some connections between an assessment result and Occupations (High School Teachers), and Programs of Study. You could also easily transition to US Colleges and Universities or Financial Aid opportunities (scholarships).

The example below reflects only one possible route (of several) to explore using assessment results. Providing comprehensive content with multiple paths of exploration reinforces effective career exploration and decision-making. Users save their exploration tool results, titles they like, and notes to themselves in their portfolios. They also can complete activities to facilitate decision-making and planning.

Assignments

- Design a structured use of MCIS for a classroom, group, or individual setting.
- Design a flow chart for the structured use an assessment with several areas of content.
Lesson 9: Writing Reflections in MCIS

Think for a minute: why would a person reflect upon their career development? Because reflecting is key to learning; it’s how we make meaning of information and our learning.

In MCIS, users reflect in three areas. First, when they save any content or test result, they are prompted to save their thoughts or reflections. Second, when users complete the activities in the Career Plan’s three levels (Getting Started, Looking Deeper, and Preparing for Next Steps), they reflect. Within each level of the Career Plan they are provided an opportunity to reflect and build individual education plans by completing activities with the following reflective prompts:

From **Know Myself**

- What do you know about yourself - your characteristics, interests, and preferences?
- What did you learn about yourself from the career assessments you used?
- What career clusters interest you now?

From **Research Options**

- What occupations interest you now?
- What are the preparation requirements for the occupations that interest you now?

From **Evaluate Options**

- What did you learn about yourself from the career research you completed?
- What did you learn about how you set goals and make decisions from the career work you completed?
- From Set Goals
  - What are your personal goals?
  - What are your academic goals?
  - What are your career goals?
  - What are your plans for improvement or enrichment this year?
From **Make Plans**

**Education Plans**

- What are your educational plans after high school?
- What high school courses are you considering?
- What extra-curricular activities do you plan to participate in?
- What high school programs are you considering?

**Experiential Learning Plans**

- What other plans for career-related learning do you have?
- Exploration/Job shadowing?
- Mentoring?
- Internship?
- Community Service Learning?

**Financial Plans**

- What are your financial plans now?
- What are your financial goals?
- What did you learn about yourself from the financial research you completed?

**Action Plan and Supports**

- What is your action plan for this year?
- What are your long-term plans?
- Who will support and encourage you to achieve your goals?

From **Writing Worksheet**

- Use the writing worksheet’s text entry area to save writing samples in your portfolio, such as a college essay or career narrative.

When completing lessons in MCIS' curriculum users are asked to post reflections about what they learned, just like they are asked upon completion of activities within the Career Plan. These reflections help users process what they are learning about themselves and their career development, making meaning of the array of content MCIS displays. Reflections serve literally to create a plan or a roadmap for the person's future and to teach career and life planning skills. MCIS integrated a reflective writing element into the My Portfolio to promote the rigor, relevance and reflection recommended across the literature for individual education planning and college and career readiness.
Lesson 10: Using the My Portfolio

What is MY Portfolio? The My Portfolio supports users in: creating career plans, developing personalized portfolios to save thoughts and reflections, saving favorite career and educational content, storing assessment results, generating course plans, and organizing their education and work history for resume creation. The My Portfolio helps users better understand how to make plans and decisions by providing an organizational structure for saving career development plans, assessments, work samples and links. My Portfolio also contains the Career Plan tool, which allows users to engage in self-directed formalized career planning beginning in 8th grade. This planning continues and is refined throughout high school. There are three optional features: Checklists, Parent Accounts, and Visitor Accounts. (If you don’t have the ability to use these features please contact MCIS and we will activate them on your site.)

All portfolios can contain these elements:

1. Checklists
2. Career Plan
3. Favorites
4. Sorts and Assessment Results
5. Course Planner
6. Resume Creator/Saved and Uploaded Resumes
7. Stored Files and Links
8. Application Tracker
10. Personal Learning Plan
11. (Optional) Practice Tests

Portfolios can be transferred between sites in a state, but not between states. Users can transfer their portfolios or simply continue to use the portfolios if they change schools or agencies. When users graduate or leave your school or agency, their portfolio can follow them to their “next step” site. Transfer a portfolio under Account Settings found within the Name Bar on the top right of the homepage.

The first page of the portfolio can be customized to reflect the user’s style preference, by clicking “edit image” within the center color block on the home page. The menu allows up to fifty-three choices, some states offer less options. The selected style is carried through usage of the system; it appears in a modified fashion behind each page and on all reports.
Minnesota requires each student to have a Personal Learning Plan for academic, career, postsecondary goals and extracurricular documentation. Let’s look at how the My Portfolio can meet these requirements.

1. Checklists

Checklists, an optional portfolio component, display a state default checklist. You may also customize the checklists by grade-level, district requirements, etc. Several checklists may exist in a site or for an individual user. When school or site requirements relate to MCIS-assigned activities, the checklist will automatically update and “check” the activity when you complete these in MCIS. Use the checklist to track student status for meeting and achieving state graduation requirements, classroom assignments, or counselor/advisor assignments.

2. Career Plan

The Career Plan process requires users to explore themselves and career opportunities, research post-secondary options, evaluate these options, set goals, and make plans. The Career Plan provides the opportunity to do each of these activities and update goals as time passes. The Career Plan has three levels and five sections. Each section contains developmentally sequenced activities designed for completing five career development steps.

Once users select a section, an overview displays and prompts the user to select the activities in the order displayed, as shown to the right. Activities, instructions, links to worksheets and MCIS components display by level:

- Getting Started - grades 8-9
- Looking Deeper - grades 10-11
- Next Steps – grade 12

Each of these activities can be used at any grade level, if career development has begun in earlier grades.
3. Favorites

Any content saved by a user is kept in this folder. Users can write notes to highlight content they want to remember or record, by clicking Save when in any content area or assessment. Site Coordinators and staff with access in MCIS Administration Tools can generate reports on what users have saved. When a user saves a title it is saved under the component’s name. Click the component name to view all titles saved. The header, **My Saved [Occupations, Programs, etc.]** lists beneath it the titles the user has saved in alphabetical order. Click on the title to see the topics. The header **My Thoughts** contains the reflections to oneself about this title or the user’s thoughts about what they want to remember. **Updated** tells the user when the title was last saved; **Edit** allows users to edit My Thoughts entries. **Delete** allows the user to delete the stored title or result. You might wish to provide a script for those new to career development; this will structure and facilitate their writing as they save titles. Example: *I researched this occupation because* ____________ [assessment results, hobby, someone I know does this, etc.]. *I like this occupation because* ____________. *I can prepare for this occupation by attending* ____________ [school].

4. Sort and Assessment Results

Sort and Assessment Results stores the results of the assessments and sorts users complete in MCIS. It works much like Favorites: when a user saves an assessment or sort, it is saved under the component’s name. Click on the component name to restore the results. An additional feature of My Sorts and Assessments is **Reports**, which helps users combine the results of multiple tests and sorts to see the recurring occupations. To generate the report, click Reports and select the components you want to include on the report. The resulting table can help users interpret the results of multiple assessments and sorts.
5. Course Planner

The Course Planner allows the user to create an individual academic plan to map out courses during grades 6-14. If you need some help, you can view and print the Recommended Course Plans (listed as a link at the top of the Course Planner page), which include State’s graduation requirements, State’s university graduation requirements, and the national career cluster plans of study. Begin by choosing which grade you wish to plan. Then select the pathway (if available), subject, course title, and term and indicate if it is a required or elective class, the units of credit, and, upon completion, post grades. The user can add more cells for more classes as these fill. The Course Planner tabulates your number of credits planned for year, allowing the user to instantly see if more courses are needed for any given year.

The Course Planner puts the student in the driver's seat for planning and monitoring academic progress towards meeting goals. It also provides a personal record of academic achievement and accomplishment of state academic requirements. If the user selects a pathway, the course plan can be populated with recommended courses for any or all years. These suggested courses can be edited by the user.
6. Resume Creator
The resume creator is a repository for activities, work experiences, education and training experiences, skills and interests, and contact information for references. Information users store the Resume Creator is used to generate resumes and the college/scholarship application activity charts. When kept up to date, the Resume Creator contains all the information needed to complete job, school, or scholarship applications. The categories for data entry are shown in the graphic above.

If the user wishes to create a resume, click **Create Resume** at the bottom; select the style and topics from among those listed. Finally, select whether to list or attach references and the resume format. The RTF version can be opened and edited in any word processing program as can text. PDF format requires the full Adobe or other illustrator/designer software program for editing.

7. Stored Files and Links
Stored Files and Links allow users to upload and store files and links in their portfolios. Users can save up to five megabytes of information or links in this file. However, each file can be only three megabytes in size. Stored Files and Links is a good place to store samples of work or scanned artifacts to accompany a resume or college application. Links to pertinent sites can be added and deleted as desired. Users can view and delete items placed in Stored Files and Links.

8. Application Tracker
The Application Tracker helps students track and record key elements of their college application process: researching schools, completing school and scholarship applications, and managing acceptance. It stores information in an orderly way to help students track important dates and college application actions. Students land on the **Before Applying** (tab) where they can track: enrollment-related tests taken, advisor meetings, scholarship applications/status of applications, campus visits, and key dates. They click **Help** to learn
more about options or click Add New to add personal data. They can print anytime using the print link in the upper right of each page. The second tab, Apply, helps users track important information about schools of interest, such as: applications submitted, school deadlines, letters of recommendation, transcripts, essays, fees, and FAFSA. The third tab, After Applying, helps users manage school acceptance, financial aid, and housing application activities, as well as monitor what still needs to be done before attending college.

The combined report of assessments will indicate to a user which occupations are appearing on multiple assessments. The report now includes the Career Cluster Inventory results and displays occupations in the user’s three highest-rated clusters. Users can select from two report options: Default, which automatically selects the most recent version of every assessment the user has taken, and Advanced, which allows the user to select which assessment results to include in the report.

10. Personal Learning Plan
A new report, the Personal Learning Plan, combines the students’ career and life planning activity in MCIS and provides a clear and concise report of those efforts. This summary can help to facilitate academic and life decisions when used during student conferences. The report helps students, educators and family members see more clearly the student’s goals and needs. The summary report is designed for annual updating and captures a snapshot of the student’s present goals. Minnesota now requires all students to have a personal learning plan.

9. Practice Tests (Optional Implementation)
If a site purchases a practice test package, users will see the option for access within their My Portfolios. This ensures that the tests are linked to a specific user account. The packages include multiple timed practice tests with explanations for the Peterson’s Practice Tests links in the portfolio. The user selects which type of practice test they want to take. Next the user selects whether they want to take the full test or just a portion of the selected test. Then they answer all the questions in their selected timed or untimed fashion. Finally, they review incorrect answers to prepare for either the next practice test or the actual test.

These tests prove to be a valuable resource in geographic areas where classes for learning to do well on these tests are not available or are very expensive.
Assignment

☐ Go to Tools for Users, and view one of the following My Portfolio tutorials: Reading, Saving, and Deleting Messages or Creating Course Plans. Then practice creating your own portfolio or course plan. Save your work.

☐ Review each section of your MCIS portfolio. Make sure that you have sample entries within each section for demonstration purposes.

☐ Change the style of your portfolio to something that reflects your personality.
Messages

Messages only displays when the user has received a message from a site administrator, staff member, visitor, advisor or parent. When a message exists, and the user clicks the messages link, they will see the list of received messages. From here the user can view, save, delete or reply to messages. Clicking on My Messages displays messages with date sent, sender, sender type, and subject. From here the user can view or delete the messages. Once a message has been viewed, the envelope icon appears as an open envelope. Once deleted, it appears as a trash can.

In the screenshot above the user can see the three messages sent. The message screen shows one received unopened message and two earlier viewed messages.
Lesson 11: Tools for Users and Tools for Counselors and Teachers

Tools for Users

The Tools for Users section contains Quick Starts and Tutorials which can be accessed in the footer links for Tools for Users, or from within each section that has a Quick Start or Tutorial. You learned earlier that Quick Starts are documents that help users navigate MCIS components. These can be used as handouts in a classroom or distributed for a self-directed homework assignment that requires MCIS. Support Materials include worksheets and cards for the assessment and exploration tools. The Parent and Student Resources include articles for parents and a useful checklist for students, organized by each year of high school.

Tools for Counselors and Teachers

The Tools for Counselors and Teachers include: Administrative Tools, Classroom Activities, Guides and Instructional Notes, and Other Information. The News item contains information on changes and upcoming developments expected in MCIS. Administrative Tools contains tips and tools for the site administrator as well as tutorials for using the MCIS Administrative Tools. The On-Line Curriculum contains 173 lesson plans that support integration of MCIS components into classroom settings. This curriculum contains three curriculum units at the levels: Getting Started, Looking Deeper, and Next Steps. Each of these contemporary lessons includes a PowerPoint presentation, worksheets and a scoring rubric in both Word and PDF formats.

Educators can search the curriculum units using the options presented. Although written for middle and high schools, many of these are also appropriate for use with adults with minor modifications. The Classroom Activities also include a sampling of activities used within MCIS trainings that are useful within regular classroom settings.

Guides and Instructional Notes contain helpful contents for teachers presenting the MCIS components and learning activities. This section also contains counselor’s manuals and guides for the assessments in MCIS. The Career Plan Implementation Framework suggests specific strategies for implementing MCIS in developmental levels that are appropriate to your site and user population. These guides and the associated user materials can help educators implement MCIS assessments for the first few times.
Lesson 12: Administration Tools

Are you the MCIS Site Administrator? MCIS administration tools allow the MCIS Site Administrator and other key staff to generate reports and maintain and edit various pieces of administrative data. When established, every site receives a Site Administrator user name and password. To login as an administrator, simply type in the user name and password provided to you by your MCIS Operator.

Only the MCIS Site Administrator can assign staff accounts in MCIS, which provide individual staff with their own user names and passwords for administration tool access. Note: As a staff person with a staff user name and password, if you forget your password, it will need to be reset, just as with student passwords, and you will be asked to establish security questions, so that in the future you can retrieve a forgotten password.

Site Reports

Reports are now easier than ever to retrieve. The MCIS Site Administration Tools have been redesigned. The interface now uses mega menu navigation, which parallels the MCIS interface, for ease-of-use and navigation. A dashboard has been added for quick access to: key reports, password resetting, finding a portfolio, curriculum, and tutorials.

All reports are preprogrammed so you just click to receive the report you are looking for. You can view the number of logins at your site and the overall use of portfolios by clicking Logins. You can look at instant reports or click “Go to Full Reports” for more in-depth reporting. Note: report record-keeping in MCIS began in July, 2006; no usage statistics can be retrieved prior to this date. For the total number of portfolios, regardless of date for the site, click Portfolio Accounts Report. You can view the content saved for most MCIS content area simply click on Modules with Saved Records. You will be provided with a list of compiled results by selected date range.

Group Reports

Group Reports allow you to create reports for a group of users. Note: you must first create a group to be able to run a report on the group's usage. Group reports can be run for the same component and categories as site reports. Group Reports also allow you to retrieve and view student resumes, uploaded files and links.
Individual Reports

You can retrieve portfolio content saved for individual users by using the Individual reports tool. Select name, graduation year, group or all users and see a list of those matching your sort, then view individual portfolio contents.

Data Maintenance

All data maintenance and customization will be access through the red bar mega menu. Click on the mega menus to see your options.

Associated with each action you want to do, you now have a Quick Start on the related page. For instance if you what to create and manage a group or students, you will click on the Portfolios & Groups from the mega menu. Then click on Edit or Delete a Group; View or Edit Group Membership. In the upper right corner of the screen you will see a Help and Tutorials button. Click on the button.
Worksheets and Handouts
Name ______________________

Career Exploration – Worksheet 1

Look through the careers and decide on three that you are interested in and of which you would like to find out more information. Fill out all the information for one career at a time. Use bullets to list points under each heading.

Watch the video (next to Overview) for each profession. On the last page, list two things that you learned about this career.

1. Describe the task list and work activities.

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>

2. What are some helpful high school courses?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>
3. What are the skills and abilities required?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

4. What are the physical demands?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

5. What are the working conditions in the 4 areas listed?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

6. What interests should people have?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
7. What knowledge should people have?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>

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8. What preparation should people have?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>

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9. What are the hiring practices?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>

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10. What licensing and certification may be required?

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
</table>
11. **What are the wages?**

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

12. **What is the employment outlook?**

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

13. **What are some advancement opportunities?**

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
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</table>

14. **What are some programs of study?**

<table>
<thead>
<tr>
<th>Career 1:</th>
<th>Career 2:</th>
<th>Career 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Two things I learned about the _________________________ career on the video:

1.

2.

Two things I learned about the _________________________ career on the video:

1.

2.

Two things I learned about the _________________________ career on the video:

1.

2.
Exploring MCIS Information Files - Occupations to Programs of Study to Schools - Worksheet 2

- **Search for Occupations by Career Cluster:**
  - Go to the Occupations on the Red Mega Menu Bar. Select "Career Cluster." From this index choose "Health Science."
  - Then click on "Information about Health Science."
  - Review the various topics of information. Note the "Level of Education and Earnings" and take a look at the individual pathway information within this cluster.
  - Under "Related Information" click on "Occupations."

- **Search occupations by using the "Filter."**
  - Look at the Blue Tabs on the top of the page and click on "Filter."
  - Select education level required for occupations 2 to 3 years. Scroll down and click on "Get Results." Note the resulting list of occupations is now sorted by Cluster, Education Level, Wages, and Green. Only occupations requiring 2 to 3 years of education will be on this list.
  - Click on "Return to Section" in the upper right-hand corner. Deselect 2 to 3 years. Now select "4 years" and select "Green." Check out your results. From this screen note the "Order By" boxes. Make some choices and click on "Order by Selected."

1. **Go to the "Titles Index" and find "Conservation Scientists."** What are some highlights listed in "At a Glance?"

2. **What are some of the general categories of skills and abilities needed to work in this occupation?**

3. **What is the median hourly wage in Minnesota? What is the national median hourly wage? What is the wage in Wisconsin?**

Let's Compare Conservation Scientists and Agricultural Engineers?

4. **Click on "Compare" on the blue tabs. Click on the letter "C" and look for Conservation Scientists. Click on the title to add to your compare list. Click on the letter "A" and look for Agricultural Engineers"** click on the title. Now click on the "Compare" button.
5. Compare the preparation for these two occupations.

6. What are some similar High School Courses for the two occupations?

Click on the "Titles Index" and choose Conservation Scientists (to view only one occupational description) to answer the following questions.

7. Are there any job openings listed for this occupation in Minnesota? (Click on US Jobs - under Related Information)

8. Are there other resources listed that might help me find out more about the occupation?

9. Click on "Save" in the upper right-hand corner. Enter a thought if you like and click "Save Information." You just saved this information in your portfolio. To return to the occupation click on the title.

10. What would I study in order to prepare for this occupation? Click on "Programs of Study" under Related Information." Then click on a related title.

11. What are the program admission requirements for the program? List a couple of High School courses that would prepare you for this program.

13. Are there schools in Minnesota that offer this program? Click on "Minnesota Schools" under Related Information. Then click on any type of school.

14. Click on a "Program Description" for one of the schools.

15. Click on the “School Name” and check out the topics of information.
**PORTFOLIO ADMINISTRATION**

Administration Tools help you organize and manage portfolios and view aggregate data on program usage at your site. Use these tools to create portfolios and provide users with unique usernames and passwords, look up usernames (if the student/client opted in), assign portfolios to one or more groups, send messages, set up custom features, and view reports using various criteria. You can also upload a list of courses available at your school for use in the Course Planner, develop checklists, and create/send messages to users. See the tutorials to learn editing, reporting, customization and navigation options.

**Portfolio Administration Tools**

Log in using your Site Administrator or Staff username and password. Once logged in you can:

1. Get Instant Information on the Dashboard
   - View logins, portfolio counts, and modules with saved records
   - Link directly to password reset, finding a portfolio, or counselor resources

2. Use the top menu bar to:
   - Run Reports
     - Get information about site usage, what users are saving to their portfolio, and more
   - Maintain Portfolios & Groups
     - Reset passwords
     - Find, manage, and add portfolios
     - Create and maintain groups
   - Maintain Staff and Other Accounts
     - Reset passwords for staff and parent accounts
     - Add new staff and parent accounts
     - Manage advisor accounts
   - Customize Your Programs
     - Create, edit, and activate checklists
     - Create and edit course planner content
     - Set portfolio privacy options
   - Get Help and Links
     - Tutorials
     - Curriculum link
     - Connect to help in your state

3. Use the Site Administration bar to:
   - Send messages to staff and users
   - Change settings
   - Log out

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Creating Groups for Site Administrators & Staff

Creating groups helps staff and site administrators report and manage portfolios at a site. Groups allow you to run reports on specific lists of students or clients. Site Administrators and personnel with Staff Accounts can create groups of portfolios.

Instructions

1. Select Add New Group under the Manage Groups header in the Portfolios & Groups tab.
2. Add the group name.
3. Select Add Accounts to Group.
4. Select portfolios using radio buttons. Options for selecting portfolios are: by last name, by graduation year, or list all users.
5. Select Generate List of Portfolios.

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6. Select portfolios to add using the checkboxes or Select All.

7. Select Add to Group.

8. Select Administrator Group and this group will appear at the top of your Group pull-down menu when you are logged in to Administration Tools.

9. To add new portfolios click Add Accounts to Group.

10. As in Step 4, select portfolios using radio buttons. Options for selecting portfolios are: by last name, by graduation year, or list all users.

11. Select portfolios to add using the checkboxes or Select All.

12. Select Add to Group.
View and Print Portfolio Contents

The administration tools allow you to view the full contents of a student/client portfolio or a group of portfolios and print the contents if desired. You also can indicate specific sections to view and print at one time. This Quick Start will show you how.

Instructions

1. Select Search Portfolios under the Portfolios & Groups tab.
2. Select your search criteria:
   - Last Name begins with
   - Group
   - Graduation year
   - All users in site
3. Leave portfolio task mode at the default setting, “View, edit, show files, reset password”.
4. Select Generate Portfolio List.

Select Search Mode

- Select for Last Name begins with:
- Select by Group: Class of 2008 +
- Select by Graduation Year: Select
- Select all Users in Site

Select Portfolio Task Mode

- View, edit, show files, reset password
- Reset password(s) for portfolio(s)
- Assign advisor accounts to portfolios
- Hide portfolios
- Export portfolilo(s)
- Print portfolilo(s)

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5. Select portfolio(s) you wish to view and click View.

6. Select the components you wish to view by clicking the associated check boxes or click Select All Topics.

7. Click View Selected Topics.

8. Click Print, in the upper right corner, if you wish to print these contents.

NOTE: You will also be prompted about opening or saving the Personal Learning Plan pdf. You may view or save this file.
**MERGE PORTFOLIOS**

You can merge portfolios when a person has multiple portfolios. You may discover that users have multiple portfolios listed in the administrative account for your site. This occurs when a person creates a new portfolio because he or she cannot remember the password, or when a staff member creates one for the person because they do not realize one already exists. The contents of two or more portfolios can be merged into one.

### Instructions

1. Select Merge Portfolios under the Portfolios & Groups tab.  
   **NOTE:** You may wish to first narrow your search for portfolios using the Search Portfolios tool on the same screen.

2. Select two or more portfolios to merge by checking the boxes next to the user’s names.

3. Select Merge Selected Portfolios

4. Choose the Primary account and Select.

5. Select Continue.

6. You will know your portfolios merged successfully when you see the **Merge successful** note.

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Transfer Portfolios for Site Administrators

Portfolio accounts can be transferred from one site to another by the student or by the site coordinator (such as from a one high school to another or from middle school to high school. This can be done by batch or individually. The site where you transfer portfolio(s) must be licensed to use this program.

Instructions (Single Portfolio)

1. Click Transfer to Another Site from under the Manage Active Portfolios header below the Portfolios & Groups tab.
2. Select the user you wish to transfer.
3. Select Transfer to Another Site.
4. (Red) text informs you that the portfolio has been transferred successfully to the new site.
5. Enter the new site’s username and password to complete the transfer.

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Transfer Portfolios for Site Administrators

Instructions (Group of Portfolios)

1. Click Search Portfolios under the Access Portfolios header below the Portfolios and Groups tab
2. Select group or grad year and a graduation year.
3. Select Transfer portfolios
4. Select Generate Portfolio List
5. Use Select to select the entire group.
6. Select Transfer Selected Portfolios
7. Enter the new site’s username and password
8. (Red) text informs you that the portfolio has been transferred successfully to the new site.

All portfolios in this group will be associated with the new site as well as any parent, visitor, and advisor accounts associated with each of these accounts.

Checklists will only transfer if the site contains the identical checklist; otherwise, checklist data will be deleted with the transfer.

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Creating Checklists: For Site Administrators

Checklists help students see positive results of their efforts and track recommended or required activities. You can implement a state-defined checklist, create your own site-specific checklist, or your teachers, advisors, and counselors can develop class activity or group checklists.

Creating Checklists

1. Select Create, Edit, and Export Checklists under the Customize tab.
2. A default (state-defined) checklist displays. Use the default, add site-specific activities or create your own checklists.

Checklist Main Menu:
3. Edit the Introductory Message.
4. Edit the list of uploaded supporting materials such as your school or district’s graduation requirements.

Using Default Checklists:
5. Link Use displays how often a checklist has been linked.
6. View the contents of a checklist.
7. Activation activates a default or site checklist. If you activate more than 20 checklists at once, activation occurs overnight as it requires a lot of memory.
8. Reports generate a report of user activity associated with the checklist.
9. Duplicate default checklists to add site-specific requirements to the default list.
10. Hide default checklists once you create your own site checklist.

Creating Site Checklists:
11. Sequence Number can be set for site checklists.
12. Site Checklist Name allows you to name or rename a site checklist.
13. Linked Default Checklist displays the name of the default checklist used to create the site checklist.

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Creating Checklists: For Site Administrators

Customize a Checklist

1. To create a customized site Grade 9 checklist from a Default Grade 9 checklist, click Duplicate.

2. The duplicate checklist displays in the Visible Site Checklist table. You can now edit this, select Edit.

3. Assign properties such as name, sequence number, and note whether you want to link this to the default or keep it unlinked, select Update.

4. Edit the Introductory Text for this checklist and add up to 5 MBs of pertinent, Supporting Documents, select Edit.

5. Edit default activities or add activities, using Edit and Add New.

6. You can delete any activity by clicking Delete. Activities will be re-sequenced automatically.

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7. When adding a new activity to the Site Checklist, you must first assign a Sequence Number and select a Type of Activity.

8. An editing page displays, that allows you to specify the particulars of the activity, such as type of content, and you can review options and links used within the activity.

Note: You must activate your checklist for specific groups before it will appear in users’ portfolios. Use the Checklist Activation link to activate checklists.
Indicating Staff Review/Override for Checklist Activities

Any activity on a student’s checklist may have Self, Staff, or Parent Review checkboxes that must be checked off before the activity will register as completed. Site Administrators and Staff Accounts can both mark the Staff Review checkboxes to indicate activity completion through the Administrative Tools. They can also complete a Staff Override to mark any activity as completed, regardless of user or parent activity.

1. Select Create, Edit, and Export Checklists under the Customize tab.
2. Select the checklist you wish to edit staff review and select Report under the Reports column.
3. Select Checklist Summary Report and Generate Report to view a list of assigned users.
4. Under the View header, View to see a list of activities for an assigned user.
5. Check the Staff Review box to indicate the user has completed the activity.

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**Indicating Staff Review/Override for Checklist Activities**

### Completing a Staff Override for a Single Checklist Activity, Multiple Users

**Note:** The Staff Override allows you to mark an activity as completed when a user is unable to complete the requirement. The staff override allows the checklist to register as completed even if the user did not complete the required activity.

1. Select Create, Edit, and Export Checklists under the Customize tab.
2. Select the checklist you wish to edit with staff review and Reports in the Reports column.
5. Select one or more users.
7. Select the Add override, mark activity as met.
8. Select Update.

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Those with staff, district and site administration accounts can send email and messages to users.

Select mailbox folder: Messages Received

1. Select Messages on the top right name bar.
2. The messages window displays and you can see messages you have received. To send a new message, click Send New Message.
3. In the Messages Received folder, you can:
   - Send a new message
   - View the subject and contents of earlier received messages
   - Reply to any received message
   - Delete all received messages
4. Change the view to Messages Sent using the pull down menu.
5. In the Messages Sent folder, you can:
   - View the subject and contents of earlier sent messages
   - View the status of any earlier sent messages
   - Delete all sent messages
6. To send a message, select Send New Message.
7. Indicate who you want to send message(s) to and select Generate Portfolio List.
8. The portfolio(s) display.
9. Select the portfolio or portfolios you want to send a message to and check the box(es) in the first column.
10. Select Send Message.

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messaging for Site Administrators and Staff

Instructions (cont.)

11. The Send Messages to Accounts page displays.
12. Select the check box if you want a copy of the email message sent to the site administrator.
13. Type a subject in the Subject text box.
14. Type your message in the Message text box and Send.

Important Notes:
- If the user and staff, district, or site account holder included an email address when they set up their portfolio, the message will also be sent to the email address.
- The Site Administrator must first add an email address to your account.

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How to Save Worksheets

Worksheets provided within MCIS are fillable/savable PDF files. Word documents are also available.

Complete a worksheet, click on “File” and “Save As.” When asked where to save the document, save to your typical file storage area, such as a jump drive, cloud, desktop etc. then “Save.”

1. Once saved, go back to *My MCIS Portfolio*.
2. Click on “Stored Files and Links.”
3. Under My Files, click on “Add File.”
4. Click on “Browse.”
5. Find the file on your jump drive, cloud, desktop etc.
6. Click on “Open” - the link to the file will appear in the box.
7. Then click “Upload File.”
8. Once loaded, click “Done.”
9. Go to your desktop and delete the file. It is now saved in your portfolio.

To retrieve the file: go back to *My Files and Links.*
It will be stored under “My Files.”
How to Save Worksheets for Chromebooks

- Download the worksheet or resume from your site
- Open the Files folder on the Chromebook and copy the file to the “My Drive”
- Open up Google Apps (Docs). The worksheet or resume file should now be available to edit and save changes.
- To update in to the Portfolio, upload the file from the “My Drive” folder on the Chromebook (similar to a regular PC)
  1. Once saved, go back to My MCIS Portfolio, and click in “Files and Links.”
  2. Under Files, click on “Add File,” and click on “Browse.”
  3. Find the file on your “My Drive,” and click on “Open” - the link to the file will appear in the box.
  4. Then click “Upload File.” Once loaded, click “Done.”
  5. Go to your “My Drive” and delete the file. It is now saved in your portfolio.

To retrieve the file: go back to “My Files and Links.”

It will be stored under “My Files.”