- Login to the Project Center
- Click "Create a Project"
- Click in the “Project Name” box and type what you’d like the project to be named. The "Project Name" is basically a file folder name, so something that makes sense to you, as you’ll be the only one who sees it; example: *Marketing Dept, May 2021.*
- Click on the link below the “Client” box which reads, “*or create a new client*”.
- Click back in the “Client” box and type the name of your client’s company. If you’re working with people inside your organization, create “Reading for America” as the client name.
- Click the drop-down arrow and select the industry this client best represents (for Reading for America, it would be “non-profit/charity)
- Click in the "Consulting Company" box and start typing your name. When your name appears, click on it to select it. If your personal name doesn’t pop up, try typing the name of your company.
- Select the Product you’d like to order and then scroll down to complete the project parameters.
- Time Zone - It’s important to select the correct time zone, and this is the zone where your client (the participant) resides. This date and time appear in the login invitation email, so please select a specific time as well.
- Select the “Completion Date” (date and time survey closes) and the “Run Report Date” (date and time the report processes)
- You can skip “Comments for Printer” unless you have something odd like, “tell Fedex to put the package on the porch”.
- “Schedule Sending of Invitation Email” is where you can tell the system to send the invitation email to your Participant automatically, on a specific date and time. If you prefer to leave this blank, you can send the invitation manually as well.
- Choose the option you prefer for the three write-in comment questions at the end of the survey.
- Scroll down to “How Evaluators are Invited to Participate”. We suggest you select, “My participant can invite the evaluators”, rather than gathering all that info and doing it yourself.
- “Minimum Completed Evaluators Per Participant” defaults to 5, because that is the number of evaluators needed for a statistically-valid report. We recommend bumping it up to ensure they setup more than 5, hoping that at least 5 complete. It’s important to know that whatever number you enter here, the Participant has to setup that number of Evaluators before their self-survey tab becomes active AND the report will not process until that benchmark is reached. We can always edit the project later to a lower number if you don’t think the Participant will receive the required number of evaluator surveys you set.
- The “Promo Code” box is where you will enter a code if you have a free or discounted Profile. Leave it blank if you do not.
- Scroll to the bottom and click “Next”.
- Select the type of report deliverables you want, PDF (e-copy) or PRINTED.
- Enter Billing Address Information
- Enter Shipping information if you ordered printed materials. There are two separate address entries: one for the report and one for the binder with the interpretation manual. What comes

standard for the Profile fee, is one copy of the report and graph in a sealed envelope for your client, and one 3-ringed binder with the Interpretation Manual enclosed.

- Click “Create Project” to save the Project parameters.
- Click “Add Participant” to add your client’s first name, last name, and email address. Then click “Save Changes” to add them to the Project you just created.
- After adding your client to the project, you’ll see two pink tabs to the right. One reads, “Send Invite” and the other reads, “Send Reminder. If you’re ready for your Participant to have the login invitation email with their unique link, click “Send Invite” and the email will instantaneously go out to them.