

# Roles / UMS / Access Control

Automated role promotion from Registered User to QP

Role based discounts

Gift purchases

## Registered

- Their unrestricted access includes:
- SSPS Level I Assessment
  - SSPS Level I Assessment Results (based on taking the assessment)
  - MBTI conversion tool usage and results (for self)
  - General Training webinars
  - Qualifying Program Registration and Webinar Modules
  - Purchase Physical and View-only Level I Reports (using a view only interface, reports may be viewed, but not downloaded)

## Qualified Practitioner (QP)

- Practitioners' Portal (restricted access)
- o Client Administration – ability to administer SSPS Level I assessment to clients by setting up client profile and providing a unique URL with login requirements (user name, password); monitor client activity (e.g., completion of assessments) and track client results (access archives)
  - o Client Purchases – ability to purchase Level I reports, training webinars for clients and provide client with access (e.g., URL with login) to view only reports or webinars
  - o MBTI Conversion for Clients – ability to quickly convert client scores to generate Striving Style Level I reports for clients
  - o Account Management – manage own profile, credit information, statistics (e.g., number of assessments, billings to date), print off invoices / statements
  - Qualified Practitioner Resources – ability to buy resources (tools, binders, Licensed Practitioner Program, advanced QP training modules) or view promotions available only to QPs
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## Licensed Practitioner (LP)

- Practitioners' Portal
- o Client Administration – ability to administer SSPS Level I & Level II assessment to clients by setting up client profile and providing a unique URL with login requirements (user name, password); monitor client activity (e.g., completion of assessments) and track client results (access archives)
  - o Client Purchases – ability to purchase Level I & Level II reports, training for clients and provide client with access (e.g., URL with login) to view only reports or webinars
  - o MBTI Conversion for Clients – ability to quickly convert client scores to generate Striving Style Level II reports for clients
  - o Loyalty Program (longer term) – ability to earn credits and product bonuses based on sales volumes to clients
- Licensed Practitioner Resources – ability to buy resources (tools, binders, advanced LP training modules) available only to LPs or view LP only promotions or free resources

Clients

Products

**Note**  
Products purchased by QP / LP for clients are associated to client CT, which is then associated to parent profile