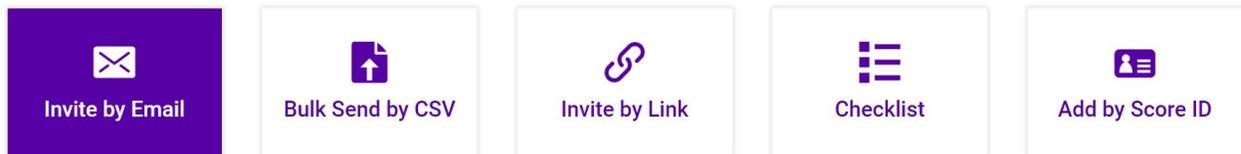




HOW TO SEND OUT THE PI BEHAVIORAL ASSESSMENT (BA)

When you click on Send Assessments or Assessment Center, you are presented with these five options:



Below is an explanation of each option. **For the most part, you will be using options 1, 2, 3.**

1. **INVITE BY EMAIL – FOR CANDIDATES OR CURRENT EMPLOYEES**

You will want to send an email in advance introducing PI and the BA so that the recipient understands “why” they are being asked to complete the BA.

Invite By Email is a good option if you only have one or two BA’s to send out at a time. You will be prompted to enter a job to match to this person (optional). Select Add New Person. You will be asked to enter the new person’s email address, first and last name, current status, and which folder you’d like the data to flow into. You’ll have one last chance to align this person with a specific job in your organization. Click Create New Person. Click Next. Select Behavioral Assessment. Click Send Now.

2. **BULK SEND BY CSV – FOR CURRENT EMPLOYEES**

You will want to send an email in advance introducing PI and the BA so that the recipient understands “why” they are being asked to complete the BA.

Bulk Send by CSV is a good option when you are just starting your PI program and you want to send out up to 50 BA invitations at a time to your current employees. Click on Employee. There is no need to enter a job here. Select “Behavioral Assessment” only and direct the results to be saved in your Employees folder. Click Yes if you would like to receive an email notification for each BA that is completed. Download the template, fill in the email and name fields, and upload the results by clicking and dragging or selecting the file from your computer.

3. **INVITE BY LINK – FOR CANDIDATES OR CURRENT EMPLOYEES**

You can create an unlimited number of links that direct recipients right to the BA. This is highly recommended for use with Candidates. This is also an alternative to Bulk Send when collecting large numbers of BA’s from current employees when you are first starting your PI program. The advantage to using links is they are quick and easy, and you don’t have to send out a BA explanation email in advance. The link can be dropped right into your email message. The disadvantage is that once sent out, the links will not be able to track who you send the BA to, whereas Bulk Send will.



If you have an existing link that you'd like to re-use or edit, just click on Manage Invitation Links. When creating a new link, click on the appropriate type, select the appropriate folder, select a job to attach (optional), give the link a name for future identification, and then decide whether you want to be notified every time a BA is completed. Talk to an ADVISA representative before customizing any settings. Click on Generate Link. Now you can copy this link and drop it into any email you would like to send out to Candidates or Employees (Candidate links should be kept separate from Employee links).

4. **CHECKLIST**

Use this option if you are gathering BA data via paper and pencil method. This will rarely be used. Ask an ADVISA team member if you have questions.

5. **ADD BY SCORE ID**

Occasionally you will have a candidate or current employee who informs you they have taken the PI BA before. Capturing a person's original BA results is preferred where possible. There is a 10-digit ID number under every person's BA synthesis graph. You can duplicate their full BA results by entering this score ID. You will also want to enter the date they originally took the BA. If someone tells you they took the PI BA before, but they don't have their results, it is that person's responsibility to request their results from the organization that has their BA results. If this is not feasible, simply have that person retake the PI BA again with your organization. Ask an ADVISA team member if you have questions.