

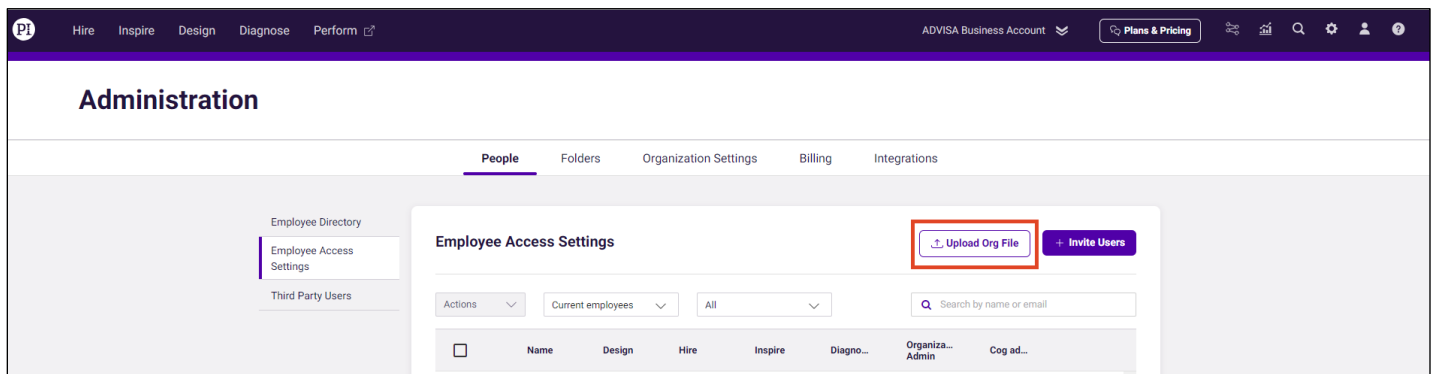
## Sending The Predictive Index® Behavioral Assessment (BA)

The Predictive Index (PI) software features multiple ways to send the BA. Use the details below to determine the best option for your organization. **Template language** for introducing the BA is included on page 4.

- **Administration:** use when sending the BA to current employees
- **Inspire:** use when sending the BA to current employees
- **Hire:** use when sending the BA to candidates as part of the hiring process
- **Design:** use when creating a Team in Design with employees who have not completed the BA

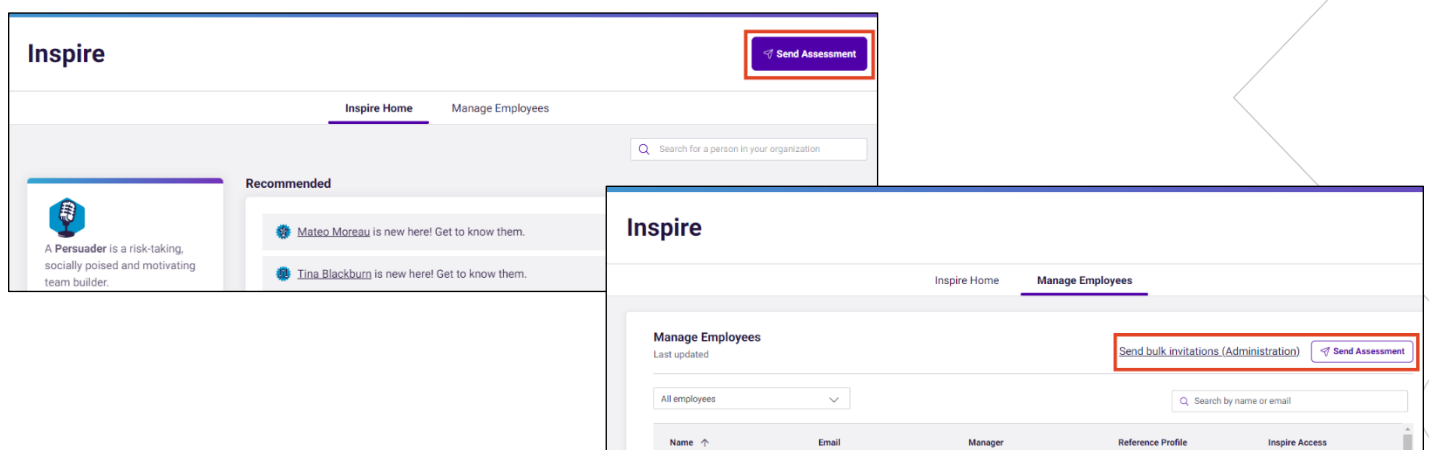
### ADMINISTRATION:

- Select the **Upload Org File icon** to upload employee data and send the BA to employees in bulk.



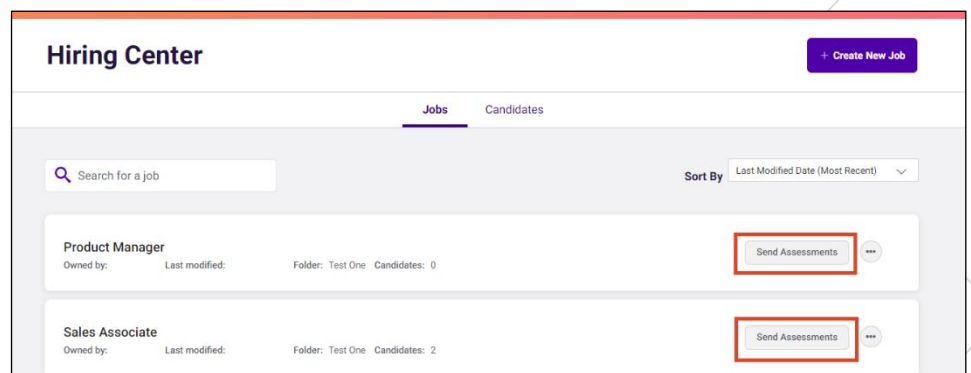
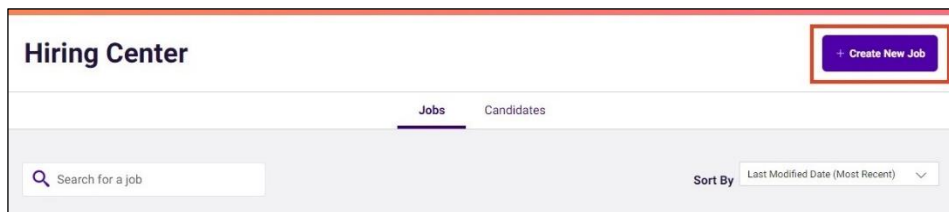
### INSPIRE:

- From the Inspire home page, select the **Send Assessment icon**. This directs users to the **Manage Employees tab** where users can enter individual employee emails or upload multiple emails.
- Employees will receive an email from The Predictive Index with instructions for completing the BA.



## HIRE:

- From the Hire home page (Hiring Center), select the **Create New Job icon** and follow the prompts to create a Job Target.
- After the Job Target is created, select the **Candidates tab**. Select the **Send Assessments icon** or the **Add Candidates icon** to send the BA to candidates through the PI software or through a custom link.
  - **Send assessments from PI (through the PI software):** candidates receive an email from The Predictive Index with instructions for completing the BA.
    - ADVISA recommends notifying the candidates in advance to introduce PI and the BA. This helps clarify why they are being asked to complete the BA and notifies them of this important email from The Predictive Index.
  - **Share a link:** create a custom URL to share directly with candidates or include in job postings.
    - Review and update the **Notification Settings** to confirm who receives completion notification emails and the candidate's Behavioral Report.
      - ADVISA **does not** recommend sending candidates the Behavioral Report during the hiring process. ADVISA **does** recommend sharing the Behavioral Report, and additional PI reports, with the new hire during the onboarding process.
    - Review and update the **Additional Configurations** to create a custom URL, enable Kiosk Mode, and add a redirect URL.
- Once the job is created, select the **Send Assessments icon** located next to the job title in the Hiring Center. Select the *Send assessments from PI* or *Share a link* tab to send the BA to additional candidates.



**Add Candidates**

Send assessments from PI | Share a link

**Sending: PI Behavioral Assessment**  
Once they complete the assessment, we'll let you know so you can review their results.  
[Preview email](#)

**Email**  
Search for a person or enter new email

**First name** **Last name**

☐ Send Behavioral Report to the assessment taker upon completion

[Send & add to Job](#)

**Add Candidates**

Send assessments from PI | **Share a link**

Copy a link to the Behavioral Assessment for this job. You can then share it directly with candidates or include it in a job posting.

**Link settings**  
**Autosend the Cognitive Assessment**  
Once the Behavioral Assessment is finished, we'll send the Cognitive Assessment to the email address they provided.  
☐ Enable Cognitive Assessment autosend

**Notification Settings**

**Additional Configurations**

[Cancel](#) [Save & copy link](#)

## DESIGN:

- From the Design home page (Team Discovery), select the **Create New Team icon** and follow the prompts to create a new team.
- Select the **Add Team Members icon**, within the Step 1 Team Members tile.
- Enter email addresses of the team members you'd like on a team. New users will receive an invitation via The Predictive Index to create a software account and take the BA.

**Team Discovery**

[+ Create New Team](#)

**Teams**

Owned by me Search Teams

Team Name	Team Type	Strategy Type	Team Members	Score	Modified
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**Mark's Team** 3 members

Teamwork & Employee Experience

Innovation & Agility

**STEP 1 Team Members**

Start adding people to your team.  
Invite team members to take the PI Behavioral Assessment™, and add them to the Team Dynamics Chart. Uncover their strengths, preferred work styles, and caution areas.

[Add Team Members](#)

**Add Team Members**

**Send Invitations**  
Invite people to join this team. New users at your company will receive an invitation to create a software account and take the Predictive Index Behavioral Assessment. Press the TAB or ENTER key after each email address.

Email Address

**Team Members**

Name	Email	Reference Profile
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## Introducing The Predictive Index Behavioral Assessment to Employees and Candidates

It is best practice to introduce PI and the BA properly and positively. Use the template language below when first announcing your PI program to employees or sharing the BA with candidates.

### Introducing the PI BA to employees:

“[COMPANY NAME] believes our people are our competitive advantage. To continue to optimize talent, we are implementing The Predictive Index® to improve hiring, inspire performance, and drive engagement. The first step in implementation is for our employees to take The Predictive Index Behavioral Assessment (BA).”

The BA provides insights into what gives individuals energy in the workplace. The two-question survey measures inherent motivating needs, which helps us understand workplace behavior and improve individual and team performance. The BA does not measure a person’s knowledge, skills, experiences, mindsets, or cognitive abilities. When leaders and managers understand their team members’ motivating needs, they can more effectively coach and develop people to their highest points of contribution.

To begin leveraging the power of The Predictive Index at [COMPANY NAME], we ask that you promptly complete the BA. It takes less than 10 minutes to complete and should be completed in your preferred language. Please be on the lookout for an automated email from The Predictive Index with instructions for completing the assessment. *\*When beginning the BA, follow the prompts to select your preferred language.*

Thank you in advance for your participation. We look forward to sharing more information about The Predictive Index and its implementation at [COMPANY NAME].”

### Introducing the PI BA to candidates:

“Thank you for your interest in joining [COMPANY NAME].”

We believe job fit is foundational for performance and engagement. To that end, we ask all qualified candidates to complete The Predictive Index® Behavioral Assessment (BA) as part of our selection process. The data from this assessment is considered, along with all other candidate information, to create a clear picture of each candidate’s fits and gaps relative to the requirements of the position.

Set aside 10 uninterrupted minutes to complete this assessment by [INSERT DATE] using the link below. Please follow the prompts to take the assessment in your preferred language.

Thank you again for your interest in joining our team.

The Predictive Index Behavioral Assessment: [INSERT BA LINK]”