

Welcome to the Predictive Index and PI Midlantic! This Quick Start Guide will show you the basics of using your new PI platform until your scheduled training. If you have any questions, please reach out to your Consultant.

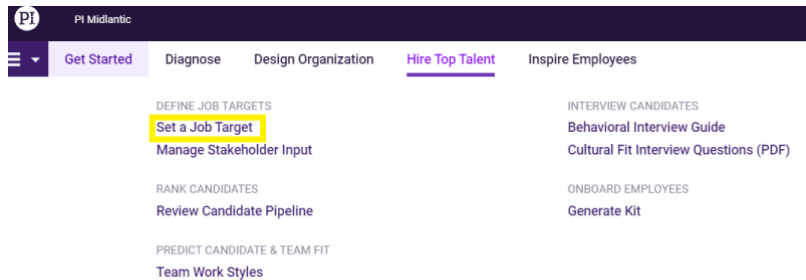
TYPES OF ASSESSMENTS AND RECORDS IN YOUR PI ACCOUNT

- 1) Assessments
 - i. **Job Assessment (JA)** – Used in defining your organization’s positions internally. JAs are sent to managers, leaders, and others to determine Behavioral and Cognitive **Targets** for Jobs.
 - ii. **Behavioral Assessment (BA)** – the flagship “PI”. BAs are sent to candidates, employees, and other **People** in your organization to determine their natural behavioral styles.
 - iii. **Cognitive Assessment (CA)** – an assessment that measures a Person’s **general cognitive ability** or “g.” General cognitive ability refers to how quickly a Person can learn, and NOT how smart they are.
- 2) Records
 - iv. **Person Page** – People in your organization and their Behavioral and Cognitive results. These can be candidates, employees, or “others” (family, friends, etc.)
 - v. **Job Page** – The Jobs or positions within your organization. Job Pages house **Job Targets** (the Behavioral and Cognitive benchmarks) as well as the **People** that are attached to those Jobs.

CREATE A JOB

Creating **Job Targets** is one of the first things you’ll be prompted to do in the PI software

- 1) Click “Create Job” under the **HIRE** module on the left-hand side.



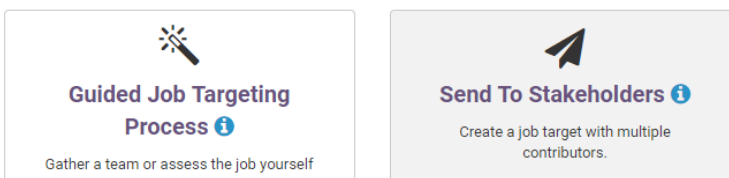
- 2) Enter the Job Title in full and then click “Lookup Job Families” – select the closest match to your Job. If there is no close match, you may always choose “No Close Match”.
- 3) Enter the “Job Description” if desired (not required), and select the appropriate folder by searching in the search box

Select Folder *

- 4) If your Job Family has a common job target profile, scroll down and select “View Additional Options,” and then select “Send To Stakeholders”. Otherwise, simply select “Send To Stakeholders”



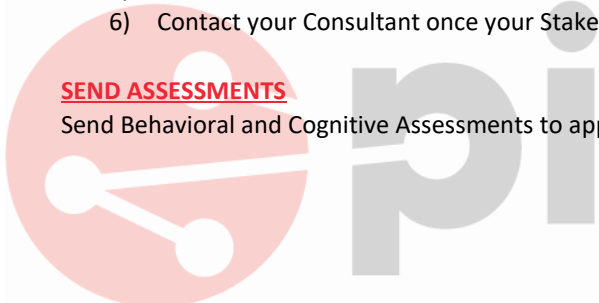
You can always modify the target later.



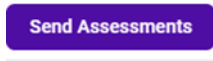
- 5) Enter the names and email addresses of the Stakeholders, and select “Confirm” to send the Job Assessment.
- 6) Contact your Consultant once your Stakeholders have completed the Job Assessments.

SEND ASSESSMENTS

Send Behavioral and Cognitive Assessments to applicants and attach them to Jobs.



- 1) Click “Send Assessments” in the top right corner of the software.



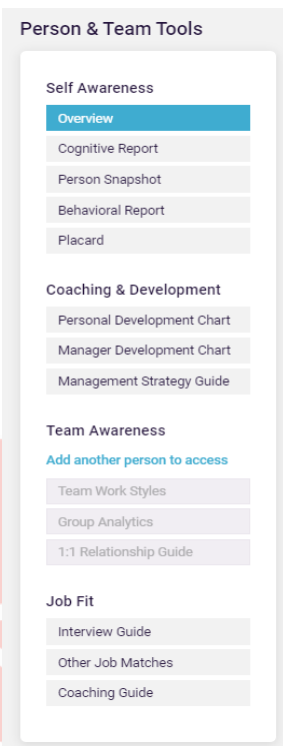
- 2) Choose your invitation method (Invite by Email is the most common and sends a personalized invitation to the recipient; Invite by Link allows you to copy a static link to send off that any recipient may click on to take a PI assessment/s).
- 3) Enter the Person’s Job in the top field and begin with their name or email address in the field below
- 4) Fill out the rest of the recipient’s information (Email address, Name, What type of person is this?, Save in Folder).

- 5) Click “Create New Person” to finalize their contact and record information
- 6) Enter another recipient if you wish to send to multiple, or select “Next.”
- 7) Choose the assessments you’d like to send: Behavioral Assessment, Cognitive Assessment, or both.
- 8) Alter the invitation language, email Subject Line or Message if you wish, and then click “SEND NOW”.

RUN PERSON REPORTS

A majority of the reports on an individual are found on the Person’s Page

- 1) Search the Person for whom you are generating a report in the top Search bar
- 2) Click on the Person’s name to access the Person’s Page
- 3) Select the appropriate report from the tabs above a Person’s results



- a. **Behavioral Report** – a Person’s BA results in full-length narrative format
- b. **Cognitive Report** – a Person’s CA results in narrative format
- c. **Person Snapshot** – a bulleted summary of a Person’s BA results
- d. **Interview Guide** – a comparative analysis of a Candidate to the Job Target and suggested Interview Questions
- e. **Placard** – a quick guide explaining how a Person interacts with others in the workplace
- f. **Personal/Manager Development Chart** – strengths, cautions, and tips based on a Person’s BA results
- g. **Management Strategy Guide** – motivating needs for a direct report (given to the Person’s manager)
- h. **Coaching Guide** – a comparative analysis of an Employee to the Job Target and suggested Coaching Questions