

# User Manual

by Psychological Consultancy Ltd

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# INTRODUCTION

Profile:Match2<sup>™</sup> is an expert assessment system that provides tailored, role specific assessments. Its accessible user-friendly interface allows you to harness state of the art psychometrics and to focus on key competencies that underpin high performance. This user guide is intended to be an aid to those navigating around the Profile:Match2<sup>™</sup> system, and is therefore written as though you are following each step on the website.

The Profile:Match2<sup>™</sup> assessment system is split into four main functions:

- Profile:Match2<sup>™</sup> Job Analysis
- Profile:Match2<sup>™</sup> Selection
- Profile:Match2<sup>™</sup> Development
- Profile:Match2<sup>™</sup> 360° Feedback

This guide will take you through each function in turn, and outline the process from start to finish for each area. You will also find key information on the other resources available from the Profile:Match2<sup>™</sup> website, including free tailored sample reports, articles, and testimonials.



# SECTION 1 – GETTING STARTED

The Profile:Match2<sup>™</sup> website can be found at www.profilematchassessments.com. Once you have logged in and registered for FREE as a Profile:Match2<sup>™</sup> user, you can:

- Find out more about the four different functions of Profile:Match2™
- Access FREE tailored sample reports
- Learn more about Profile:Match2™ from articles, research, and testimonials
- Explore technical details and costs
- Obtain free access to the Profile:Match2™ technical manual

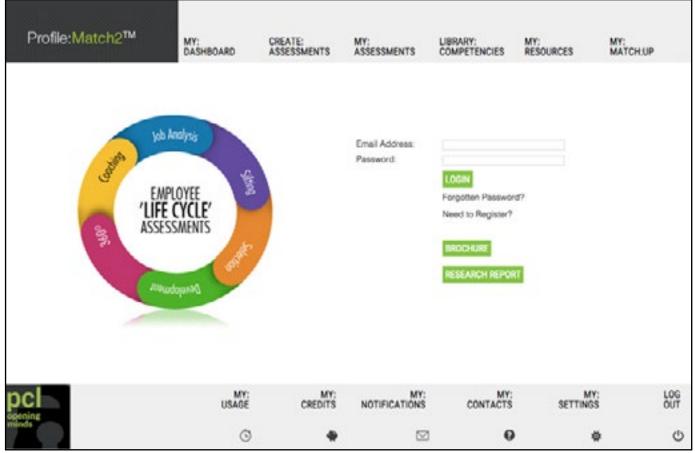


Image 1.1 - Login page



#### REGISTRATION

Registration on the Profile:Match2<sup>™</sup> website is completely FREE. Just click 'Need to Register?' on the login page and complete the form. Requested details include your company name, first name, surname, email address, password, address, postcode, country, telephone number, and fax number (see Image 1.2). You use your email address and password whenever you login. An email will be sent to you confirming your registration details, so keep this safe.

Company:		
First Name:		
Sumame:	1	
Email:		
Confirm Email:		
Password:		
Confirm Passwor	rd:	
Address:		
Postcode:		
Country:	Australia	0
Telephone:		
ax:		
Apply for an I	Invoiced Account?	
	ad account the DDO	FILE:MATCH™terms and conditions

Image 1.2 – Registration page

You also need to choose your preferred payment method - invoiced account or pay as you go by credit card. If you prefer to be invoiced for your Profile:Match2<sup>™</sup> usage once a month, tick the box next to 'Apply for an Invoiced Account'. Your application will then be processed, and we will inform you by email of the outcome. Leaving this box 'un-ticked' means that you prefer to pay for Profile:Match2<sup>™</sup> credits using your credit/debit card via the Protx system.



Below is an example of the email you will receive if you apply for an invoiced account.

Dear Sophie Sample,
Thank you for registering with Profile:Match™. Please keep this email safe as you may need to refer to it later.
Company Name: ABC Limited
Your Name: Sophie Sample
Address: 8 Mount Ephraim Tunbridge Wells Kent
Postcode: TN4 8AS
Country: United Kingdom
Telephone: 01892 559540
Fax: 01892 522096
Email: sophle@abc.com
Password: sophiesample
Your application for an invoiced account is being processed and a member of our team will be in co tact with you shortly. In the meantime you may like to purchase credits using our secure online cred card payment facility.
Logon at: http://www.profilematchassessments.com/myAccount/
Kind regards,
Profile:Match™ United Kingdom
8 Mount Ephraim, Tunbridge Wells, TN4 8AS 01892 559 540   info@profilematchassessments.com
You can then use the email address and password in your version of this email to login immediately a begin using Profile:Match™.

Image 1.3 - Registration confirmation email



For first time users, once you have registered and logged into your account you will then be able to:

- Get help choosing competencies using the Job Analysis Survey
- Create new Profile:Match2<sup>™</sup> Selection templates
- Create new Profile:Match2™ Development templates
- Create Profile:Match2<sup>™</sup> 360 Surveys
- Buy credits and check your credit status if you are not an invoiced client

You will also have access to all of the main resources on the website by clicking "My Dashboard" in the toolbar at the top of the screen.

For returning users, once you have registered and logged into your account you will then be able to:

- View a listing of all Profile:Match2<sup>™</sup> Selection, Development, 360, or Job Analysis Survey (JAS) templates that you have previously created

- Create new Profile:Match2<sup>™</sup> Selection templates or delete any that are no longer required
- Create new Profile:Match2<sup>™</sup> Development templates or delete any that are no longer required
- Create or delete Profile:Match2<sup>™</sup> 360 Surveys
- Get help choosing competencies using the Job Analysis Survey
- Buy credits and check your credit status if you are not an invoiced client
- View your Profile:Match2<sup>™</sup> usage

You will also have access to all of the main resources on the website, which you can access by clicking "My Dashboard" in the toolbar at the top of the screen.



#### COSTS, SAMPLE REPORTS, AND USER MANUALS

To view costs, a variety of sample reports, and the user manuals for the Profile:Match2<sup>™</sup> system, move your cursor over the 'My Resources' tab in the toolbar at the top of the main homepage, and select the desired resource from the dropdown menu. You can also view the required resource by clicking in the 'My Resources' box on the dashboard (see Image 1.4). The sample reports and manuals are available as downloadable PDF documents.

MY: RESOURCES	
Price List View Sample Reports View Manuals	

Image 1.4 - My resources



#### **PREVIEW TAILORED REPORTS**

It is also possible to create and preview tailored reports for the 'Selection' and 'Development' functions of the Profile:Match2<sup>™</sup> system by using the competencies library. Simply click on the 'Create Assessments' tab in the toolbar at the top of the main homepage, select your desired competencies, click 'Selection Reports' or 'Development Report' in the bottom right hand corner of the screen, and then select 'Preview'. You will then be provided with a downloadable PDF of your chosen report.

G Frofile:Match2		212 2042-010	M): Kono Mettik	t North Talaight fo	Un: Bratta -a	N <sup>A</sup> NATION DE
IAEAIB Nosidovent remplare	COMPLEMENTS		C.		er onder de compt instruction de compt instruction de comp	
e / vez	1738-28-2444 Constant (1) Garage (2) Radia (2) Radia (2) Radia (2)	Templates Alternative Alternative Alternative Alternative Alternative	- 0 - 0	DI State da Concentration Marchen e (2) State of Concentration (2) State of Concentration	THE THE CONTRACTOR IN THE REAL REAL PROPERTY AND ADDRESS OF THE REAL PROPERTY AND ADDRESS OF THE REAL PROPERTY AND ADDRESS OF THE REAL	anna anna Anna anna
	ranavalasi Taranalasi 1939: Salaha 1939: Salaha 1939: Salaha 1939: Salaha	P IN PLAY	• D	DS (Second Second Secon	a no, a tany conta a tangan ang	*****
	1992 (1) 1992 (1) 1992 (1) 1992 (1)	a-11 4	Surveux E	oni See neali 9	01 15 01	ې ۲۲
		nentanan At		-	-	

Image 1.5 - Preview selection report

Please note, previews of 360 Feedback and Coaching reports are only available as PDF downloads of existing sample reports (and cannot be tailored). When previewing a tailored report, you can choose up to 10 of the 28 available competencies from the Library in Image 1.5, or select a pre-existing template from the dropdown menu.

For more information on what each competency refers to, hover your cursor over the 'i' next to the competency title. This will bring up a small window in which you can view the competency description. These are designed to assist you in the selection of your competencies. If you are a registered user, you can save your competency configuration for future use as one of your Profile:Match2<sup>™</sup> templates.

It is also possible to view all of the competency descriptions in PDF format by clicking 'Library Competencies', either in the toolbar at the top of the main homepage, or on the dashboard.

R

# Profile:Match2

TOTAL SELECTED 1	υTE Ο	Sud Son The The Che	incomputancy in we are there to be encourage parts and the space of the space of the test of the space of the space of the test of the space of the space of the test of the space of the space of the test of the space of the test of the test of the space of the space of the test of the space of t	ohassessments.com says: aing taps into several presentity dans degres of evolue, or comparateurs yet new me: sa' and 'Cleative' advants Polarite' reven yet competency several e shite nake tothe storage Cancel OK	
BRITISH KG	0	O NH ROLENSEIS	0	wavic	0
NEOPENDORCE	0	GLERCHER FOCUE	0	GIEATINE	0
NAMAGING DIVANS	0	DIVIDING OTHER	0	BEDISCH MAARKS	ω
PERSONAL DOMINING ATION	0	INTERPERSONAL BALLS	0	ALDERUTY	0
PROJECT INVOCEMENT	0	INCOME MANAGEMENT	0	PLOTE HIS STATE	0
REDUCTS CREATIANCES	0	TEAM DREATANING	0	STRATEOR, AMARENESS	0
ATT MIDE TO IT 19	0	TROUGHT ISTORIA	0		
ICONSI-THENT	0	NUTVATO	0		
INFORMED IN MARKE SECT	0	11-11-11-1	0		
PLANNING AND OR SAMELING	0	RSK TARIK	0		
		STECHTERS	0		

Figure 1.6 Competency Similarity Pop-up

#### **Confirm Competency Selection**

Clicking on save next to preview will take you on to the next stage of the set up unless you have selected competencies which have been shown by our analysis to be somewhat similar. The site will flag up in a pop-up which competencies look at similar personality scales and you will be offered the chance to swap these for other competencies or remove them from your assessment set up.



#### MANAGING YOUR ACCOUNT

With Profile:Match2<sup>™</sup>, you are in complete control of your account and your usage.

#### **BUYING PROFILE:MATCH2™ CREDITS**

Unless you have been set up as an invoiced customer, you will need to purchase sufficient credits to allow each of your candidates to complete online Profile:Match2<sup>™</sup> assessments. Please note, if you have insufficient credits on your account, candidates will not be able to complete assessments. To purchase credits, hover your cursor over 'My Credits' in the bottom toolbar, and then click 'Add Credits'. This will take you to the 'Add Credits' screen (see Image 1.6).

MY: CREDITS	ADD CREDITS	INSTRUCTIONS
		You can purchase credits to generate reports in the Profile <b>MATCH'*</b> system.
		01 Decide how many credits you want to purchase. This will depend on which reports you want to produce and how many. See the table below if you are unsure.
PRICE PER CREDIT:	EN 00 + VAT	02 Complete the billing details requested.
PAYMENT METHOD	By Credit/Seld card	03 Click ADD CMFDITS to be transferred to the online
AMOUNT OF CREDITS		bayment page.
FIRST NAME		CREDITS PER REPORT Siting Report 13
SURNAME		Selection Report 27
ADDRESS		Interview Guide Report 20
OTY		Personal Development Report 42 360 Feedback Report 117
POST CODE		360 Coaching Report 30
COUNTRY	Autoria	
		ADD CREDITS
		>

Image 1.6 – Add credits

Enter the number of credits you require by using the 'Credits Per Report' information on the right hand side of the screen. Once you have completed the form, click 'Add Credits' on the bottom right hand corner of the screen to be directed to our secure payment site (see Image 1.7 below). Select your desired payment method and enter your details.



•	o	0
	How do you want to pay?	
Psychological Consultancy Ltd	VISA Visa	>
Order description: Profile:Match(TM) credits	VISA Visa Debit	,
<sup>То рау</sup> 540.00 GBP	VISA Visa Electron	,
040.00 0.01	MasterCard	,
	Debit MasterCard	•
	Maestro	,
	< Cancel	
		Your payment is secured by SOCE   Paty

Image 1.7 - How do you want to pay?

Remember, you must ensure you have sufficient credits before you send out the PsyKey guide to your candidates. You will receive a confirmation email notifying you that your debit or credit card has been charged and payment taken successfully.



#### MANAGING YOUR PROFILE:MATCH2™ USAGE

To view your usage of Profile:Match2<sup>™</sup>, click 'My Usage' on the bottom toolbar. This will take you to the 'Client Usage' screen (see Image 1.8 below), where you can view usage reports by the month and year. Instructions on the right hand side of the screen can help you with this.

MY USAGE	CLI	CLIENT USAGE				INSTRUCTIONS		
						5.		
			_	_	on ye	his page you can search for usage bur account by date and by idates.		
Account Number 30	PM1005				01	You can see who has completed		
Client Name 12	No. of Concession, Name				01	assessments and what type of report has been generated.		
	010000 To 🔲 1	ISEARCH LAST MON	TH THIS MONTH CL	AR DATES		You can re-generate any		
Candidate Name					02	existing reports at no cost. Simply click on the candidate's		
REPORT TYPE	GANDIDATE NAME	ASSESSMENT NAME	COMPLETED	CREDIT		name next to the report you want to generate and follow the onscreen instructions.		
Sifting	Suzie	as,Resilance,Practice,Assessment	27/11/2014	13				
Sitting	Deniel	as_Resiliance_Practice_Assessment	01/12/2014	13	03	If you have previously had one of the four Selection Report		
Sifting	Maj	aa_Resiliance_Practice_Assessment	01/12/2014	13		options (Selection, Sifting, Feedback or Interview Guide) you can now generate a new		
Sifting	Clare	ea_Resiliance_Practice_Assessment	06/12/2014	13		Selection type report here for an additional fee.		
Selection	Lauren	Lauren at Marketing	05/12/2014	27				
Sitting	Lee	sa_Resilance_Practice_Assessment	09/12/2014	13	04	Similarly, if you have previously purchased a 360 Feedback		
Selection	Gary	PM Selection Freeble	12/12/2014	27		Report for an assessee you can purchase and download a		
Selection	JACK	PM Selection Freeble	14/12/2014	27		Coaching Supplement here.		
Selection	Liz	Recruiter Recruitment Consultant	15/12/2014	27				
Development	Sarah	internal project	15/12/2014	42				
Fini - 11 12 15 14 15	6 - Lani							

Image 1.8 - Client usage

You can choose to sort the information by clicking 'Report Type', 'Candidate Name', 'Assessment Name', 'Date Completed', or 'Credit Cost'. These columns enable you to keep track of your candidate completions (along with their associated costs), and manage your applicants to ensure assessments are completed on time.

#### **REGENERATING REPORTS IN PROFILE:MATCH2™**

You can also use the 'My Usage' screen in Image 1.8 above to regenerate candidate Selection, Development, and 360 reports at no additional cost. Simply click on the candidate's name and follow the onscreen instructions. Please note, if you have previously had one of the four Selection Report options (Selection, Sifting, Feedback or Interview Guide) you can now generate a new Selection type report here for an additional fee.



# SECTION 2 – HOW TO SET UP A PROFILE:MATCH2™ JOB ANALYSIS SURVEY

#### INTRODUCTION

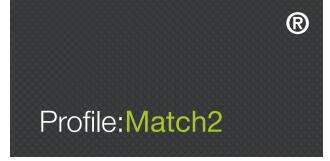
The Job Analysis Survey (JAS) helps you choose critical competencies that relate to success in the role you are recruiting for. The questionnaire should be completed by people who know the job well, or who have a particular interest in the appointment e.g. people who currently do the job, line managers, and people who recruit for the role.

The questionnaire contains 110 statements about characteristics that may improve performance in any given job role. It usually takes between 15-20 minutes to complete. Respondents to the questionnaire need to rate how important they consider each characteristic to be for effective performance in the job. The characteristics are all generally desirable but, when completing the JAS, raters need to prioritise those aspects that they feel are really essential for someone to perform well in the role. You can generate JAS reports based upon any combination of contributors.

It is important to remember that, although the JAS is designed to assist in identifying key competencies, the results should be reviewed carefully before making your final selection. Clients should consider the competencies that are rated most highly, and make their final decisions about priorities within the context of all other information they have about the role. A brief summary of the JAS can be found by clicking on the 'Create Assessments' tab at the top of your main homepage, then select the 'Job Analysis Survey' on the bottom right of the screen and then 'Info' (see Image 2.1).

CREATE ASSESSMENT TEMPLATE	COMPETENCIES			
				On this page you can choose the compolencies and the type of report that are relevant for your accessment template, and/or create a Job Analysis Bureey
TOTAL SELECTED 10		Templates laces of		However, the Collision next to each componency for a optimized operation.
GOM, SEEKING	INTERPERSONAL	STRATEGY		01 Select your required competencies in the window, left, or choose an existing template from the outlidown template Promote.
INFORMS	COMMERCIA DALIMENTO	AMERIC CIERTIS	0	02 Chase the type of separt you need below - Selection, Development or 300.
	annionacoantas	Generation Manager	0	03 Preview your chosen competencies for Selection or Development Reports or view a sample cab recort.
PERSONAL COMMUNICATION	BLERADING NUT	ADRUN	Ø	04 Click on the SWE burler to Instead your temptate deals.
HEADER IN MARCHINE ()	Harri Wayakiki 🕕	PICH FMRD SHL	0	05 Alternatively, 1 you want to create a Job Analysis Survey click on the button below.
HELES DE HELES ()	THEN CREATERN 🕕	STRATERIC MAATHESS	Œ	Survey click on the button below.
				JOB ANALISHS INFO CREATE
ALLIK KAR KOLMA	THAT BEFORE THE CO			SURVEY >
CONTRACT O	исталися (Д)			RELECTION REPORTS
NUMPER BOARDING	interes (j)			DEVELOPMENT -
	RECORDS (1)			REPORT

Image 2.1 – Job analysis page



#### **STEP BY STEP GUIDE**

#### **CREATING A JOB ANALYSIS SURVEY**

Use of this service is currently FREE to all registered Profile:Match2<sup>™</sup> users; it is accessed by clicking on the 'Create Assessments' link on the tool bar. Scroll down to the bottom right and select 'Job Analysis Survey', then click 'Create'. This will bring you to the 'Create Job Analysis Survey' set up page (see Image 2.2). You can also view surveys that you have already created by clicking on 'Job Analysis' in the 'My Assessments' box on the dashboard.

MY: JOB ANALYSIS	CREATE JOB ANALYSIS SURVEY	INSTRUCTIONS	
		01 Complete the details requested in the form on th and click on the SAVE JOILANALYSIS SURVEY buts save your JAS. After saving, you will be able to o these settings in the JAS area of MY. ASSESSMEN	ve lieft on to edit (13)
JAS NAME		Once this JAS has been saved you will receive a instruction email to forward to raters so that they complete the JAS. A maximum of 50 raters can part in this survey.	an I cain Iake
JOB TITLE		03 Monitor progress and get results of the survey b to the JAS area of MY ASSESSMENTS.	y going
ADMIN NAME			
ADMIN EMAIL EXPRY DATE			
	Salterate .		
		SAVE JOB ANALYSIS SURVEY	ja.
		SUNTE 1	>

Image 2.2 – JAS setup

You will then need to enter a JAS name, job title, company name, admin name, admin email, and an expiry date for your survey. The page will automatically assign you a unique access code. When you save the JAS you will receive an instruction email to forward to raters so they can complete the JAS.

#### MANAGING A JOB ANALYSIS SURVEY

You can monitor what is happening as your raters complete the JAS by clicking 'My Assessments' on the toolbar, then 'My Job Analysis Surveys'. You will then be brought to your 'Existing Surveys' page, where you can view your raters' progression for each survey. As each contribution is received, details will appear in the table shown in Image 2.3.

TEMPLATE NAME	RATERS COMPLETED	EXPIRY DATE	EMAIL	RESULTS	EDIT
Reliable Driver	2/2		۵	Û	9
Administrative Assistant	7/7		۵	Û	4

#### Image 2.3 - JAS template progress



The 'Raters Completed' column shows how many raters have been asked to complete the questionnaire and how many have actually completed it. By clicking on the edit symbol in the 'Edit' column you can be reminded of your details for each individual survey, including your admin name, expiry date, and access code. When raters have completed the necessary questionnaire you can produce a report, rank ordering the competencies by clicking on the symbol in the 'Results' column (see Image 2.3. above).

RATER NAME	EMAIL	COMPLETED	
Sarah Rasmussen	sarah@psychological-consultancy.com	COMPLETED	۲
Geoff Trickey	geoff@psychological-consultancy.com	COMPLETED	2
Grace Walsh	grace@psychological-consultancy.com	COMPLETED	2

#### Image 2.4 – JAS progress

#### **GENERATING REPORTS**

To generate the Job Analysis Survey Report, you need to select at least one rater from the list (shown in Image 2.4) by ticking the box in the 'Include' column next to their name, and then click 'continue to results' in the bottom right hand corner of the screen. You can choose which raters to include, and you do not need to include all raters to generate a report. You will then be able to download the report (in PDF format), as seen in Image 2.5.



Image 2.5 – JAS report generation



In the Job Analysis Survey Report, all the Profile:Match2<sup>™</sup> competencies will be listed in order of priority, along with the total number of 'votes' awarded by your raters to each competency during the project, as shown in Image 2.6. You can now use this as a guide to choosing your competencies for your Profile:Match2<sup>™</sup> templates.

Priority	Competencies	Points
1	Attention to Detail Having a practical, realistic outlook; being conscientious, attentive to detail and dutiful.	91
2	Planning and Organising Being organised, thorough and conscientious; appreciating the importance of planning and co-ordination in meeting organisational objectives.	89
3	Customer Focus Recognising the significance of customer satisfaction to organisational success and responding to customers in a professional and courteous way.	83
4	Resilience Remaining calm and rational under pressure, being even-tempered, confident and generally upbeat, and maintaining emotional independence.	π

Image 2.6 – JAS report



# SECTION 3 – HOW TO SET UP A PROFILE:MATCH2™ SELECTION SURVEY

#### INTRODUCTION

Profile:Match2<sup>™</sup> delivers Sifting and Selection Reports and Interview Guides, all focussed on the competencies deemed essential for a particular job. All you need to do is identify the characteristics required for this appointment from the Profile:Match2<sup>™</sup> competency library (or you may have done this using the JAS). Profile:Match2<sup>™</sup> then builds your bespoke questionnaire and emails you the instructions needed by your candidates to complete the questionnaire online. Once completed, their reports are delivered immediately to your inbox.

**STEP BY STEP GUIDE** 

#### CREATING YOUR PROFILE:MATCH2™ SELECTION TEMPLATE

When you log in to Profile:Match2<sup>™</sup>, you will arrive at the 'Create Assessment Template' page (see Image 3.1 below). You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

ORFATE ASSESSMENT TEMPLATE	COMPETENCIES			INSTRUCTIONS
				On this page you can choose the competencies and the type of report that are relevant for your accessment femalate another oreale a Job Analysis Survey.
TOTAL SPLIPETTO 10		Templates Game to		Hover over the $(\hat{\mathbf{D}})$ outfor next to each competency for a data red description.
CON SELONS				01 Solaci your required compotencies in the endow, laft, or choose an existing temp ate from the pull down Template Prompts.
MERTINE O	escentration ()		O	02 Choose the type of report you need below - Development or SIC.
NWARNED AND	80483/1675 ()	BEIBRICK NAVIDS	Ð	03 Previoe your chesion considerations for Schar on or Devolucionent Reports to slow a scriptic 300 Report
MINIMUM DEMANDER BY	AUTORNICAN EGUE	HERE IN	0	04 Clos on the SAVE button to that se your template others.
NO.021 DECEMBER 1	PLOPLE HARACHUR ()	PROBLEM SCUMIC	0	ns. Alternatively, if you want to centre a Job Analysia
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				208 ANA.753
ATTENDO DO CONTRA	LICORREPCTICA.			JOB ANALYS S SUBJEY
	******* (I)			RELEASED PRIVEN SHIE
NEOWARDS ROWARDENT	NILDA D			DEVELOPMENT
n were we converse 🕢	BIK MARK ()			TROPORT
	SUPPORT OF			MC REPORTS

Image 3.1 - Create assessment template page

Next choose the competencies you want to include in your template. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu.



You can include up to 10 competencies in your template simply by clicking on them (see Image 3.1). If you change your mind, you can re-click the competency and it will be deselected. From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click 'Selection Reports' on the right hand side of the page, and then click 'Save'.

#### SAVING YOUR PROFILE:MATCH2<sup>™</sup> SELECTION TEMPLATES

The next page is the 'Save Selection Template' page, where you need to fill in each of the fields (Image 3.2). See below for more information on what is required in each of the fields.

MY: SELECTION	FINALISE TEMPLATE DETAILS		INSTRUCTIONS	Ξ
			Complete the details requested in the to click on the SAVE SELECTION TEMPLATE template. After saving, you will be able settings in the MY. ASSESSMENTS area	button to save your
		Ð	Once this template has been saved yo instruction email to forward to candidat complete the assessment.	
TEMPLATE NAME				
CANDIDATE JOB TITLE				
JOB LEVEL	Planta Salio(1			
REPORT TYPE	📑 Selection report (27 credita) 🚭 Sifting Report (13 credita)			
INCLUDE FEEDBACK REPORT	🖨 Yes (actos 11 credits) 🙍 No			
EMAIL FEEDBACK REPORT TO CANDIDATE?	🖨 Yes 💌 No			
COST	27 predits			
ACCESS CODE	P#00x20+K3			
ADMIN NAME			SAVE SELECTION	
ADMIN EMAIL			TEMPLATE	
COMPANY				
EXPRAY DATE				
NOTES				

Image 3.2 – Save selection template

#### **Template Name**

This is the name of the competency template you will create, and it will help you to find it when you next want to use it. It is for your own purposes only; this name will not appear on the report.

#### Candidate Job Title

This is the name of the role you are assessing. It is important that you choose this carefully as it will appear on every page of the Profile:Match2<sup>™</sup> report.

#### Job Level

Specify whether this role is non-managerial, junior manager, middle manager, senior manager, or director.



#### **Report Type**

This option allows you to specify whether you would like a 'Sifting Report' (i.e. a summary of key findings with suggested areas to explore further), or a 'Selection Report' (i.e. full competency descriptions with detailed narrative).

#### **Include Feedback Report**

Checking 'Yes' will automatically generate a 'Candidate Feedback Report', which will be emailed to the specified email address (along with the Profile:Match2<sup>™</sup> report), as a PDF document (this will add additional credits to the cost of an assessment). Please note the feedback reports cannot be added at a later date.

#### **Email Feedback Report to Candidate?**

Selecting 'Yes' will automatically send the Feedback Report to the candidate's email address as well as to the Admin email. There is no additional charge for this service. This report is suitable for candidate use.

#### Note Regarding Interview Guide Report

Please note, the Interview Guide can be chosen later for candidates shortlisted for interview by clicking on 'My:Assessments' in the main toolbar, then selecting 'My:Assessment Templates', and then clicking on the symbol in the 'Generate Report' column to the right of your chosen selection template. You can then click on the name of a candidate that has completed a Selection Report, and select 'Interview Guide' (this will add additional credits to the cost of an assessment).

#### Cost

This outlines the number of credits your chosen configuration will cost you per person.

#### Access Code

This is the code that the candidates will use to access the assessment. A random code is automatically generated and will appear in the box. Please note the access code cannot be changed.

#### Admin Name

This is the name of the person who will receive the Profile:Match2<sup>™</sup> report. The system will automatically input the name of the registered client, but you can change this now or later.

#### Admin Email

This is the email address where the Profile:Match2<sup>™</sup> report will be sent. The system will automatically input the email address of the registered client, but this can be changed when completing the set up, or at a later date.

#### Company

This is the name of the company that requires the assessment.

#### **Expiry Date**

This is the date that access to the Profile:Match2<sup>™</sup> assessment expires. This date can be changed later, and you can also 're-activate' an expired template by amending to a future date.

#### Notes

This section is space for you to make notes about this Profile:Match2<sup>™</sup> template.



Please note, once you save your template, you will not be able to amend the fields of: 'Candidate Job Title', 'Job Level', 'Report Type', 'Include Feedback Report', 'Email Feedback Report to Candidate?', 'Cost', 'Access Code', or 'Company'.

After you have completed the fields, click 'Save Selection Template' in the bottom right hand corner of the screen. A PsyKey Guide, providing instructions for your candidates on how to access the questionnaire, will be sent to the admin email you have entered.

#### \*\*IMPORTANT\*\* BEFORE INSTRUCTING CANDIDATES

Please note that if you are NOT an invoiced client, before you send out the candidate instruction sheets you MUST ensure that you have used your credit card to purchase sufficient credits to allow each of your candidates to take the online assessment. If you have insufficient credits, your candidates will not be granted access to the online assessment when they log in to complete the survey.

Once you have created a template, it can be viewed and re-activated at any time by clicking on 'My Assessments' and then 'My Selection Templates', or by clicking 'Selection' in the 'My Assessments' box on the dashboard (see Image 3.3 below).

MY: SELECTION	EXISTING TEMPLATES				
					Ð
TEMPLATE NAME	GE	ENERATE	EMAIL	COMPS	EDIT
ABC Company HR			۵	۵	ļi -
ABC Company Call Centre			۵	١.	ø
ABC Company Head of Sales			٩		
SEARCH FOR TEMPLATES	Total Select	ion Tempi	atas:		2

Image 3.3 – Existing templates



Selecting the 'Edit' symbol next to your desired template will allow you to view the details of the template. You will also be able to edit the fields of: 'Template Name', 'Admin Name', 'Admin Email', and 'Notes'. You can also 're-activate' an expired template by changing the 'Expiry Date' to one set in the future.

Selecting the 'Comps' symbol next to the desired report provides a reminder of the competencies that were selected when the template was created (please note, these cannot be changed), whilst selecting the 'Email' symbol will resend the Psykey instruction email to the address written in the 'Admin Email' field.

#### **GENERATING REPORTS**

There are a number of ways to generate Selection Reports:

#### **Automatic Generation**

Once the candidate has successfully completed an assessment a report (plus the Feedback Report if selected) is automatically generated and emailed to the address given during template setup. Please note, if you selected 'Yes' to the option 'Email Feedback Report to Candidate?' (see Image 3.2. above), a Feedback Report will be automatically emailed to the candidate as well as to the Admin email address.

#### **Regenerate Existing Report**

You will also be able to regenerate completed candidate reports that have previously been automatically generated. Go to the 'Existing Templates' screen within the Selection section of the Profile:Match2<sup>™</sup> website (see Image 3.3 above). Click on the 'Generate Report' symbol next to the desired template, select the name of the candidate, and then click on the symbol next to the option that had previously been automatically generated to produce an 'in-browser' .pdf version of the report (at no additional cost). Alternatively, you can use the 'My Usage' screen shown in Image 1.8 of Section 1 above. Simply click on the candidate's name, and select the report type that had been previously automatically generated (at no additional cost).

#### **Generate Additional Report Option**

In Profile:Match2<sup>™</sup> there are 4 report options for Selection templates - Selection, Sifting, Feedback, or Interview Guide. During template setup you will choose one of these options (or 2 if you select Feedback report as well) but later you may want to generate an additional report. For example, you may have set up your template to produce a Sifting Report but now you have shortlisted a number of candidates and you want either a more in-depth Selection Report to get more information about the candidates or an Interview Guide Report to help with questions for interview. You can now do this within the Profile:Match2<sup>™</sup> system for an additional fee.

Go to the 'Existing Templates' screen within the Selection section of the Profile:Match2<sup>™</sup> website (see Image 3.3 above), click on the 'Generate Report' symbol next to the desired template, and then click the name of the desired candidate. Select a type that differs from the automatically generated option to produce an 'in-browser' .pdf version (please note, this will cost an additional fee).

Alternatively, you can use the 'My Usage' screen shown in Image 1.8 of Section 1 above to generate an alternate report type. Simply click on the candidate's name and select an option that differs from your original automatically generated option to produce an 'in-browser' .pdf version (please note, this will cost an additional fee).



# SECTION 4 – HOW TO SET UP A PROFILE:MATCH2™ DEVELOPMENT SURVEY

#### INTRODUCTION

Profile:Match2<sup>™</sup> Personal Development Report offers a complete audit of an individual's potential from a personality perspective. Based on high status psychometric information, it considers the implications of each profile for aptitudes and competencies at work. It offers an authoritative alternative viewpoint against which an individual can review their current self-perceptions, allowing them to set new personal goals and objectives and to map out realistic and attainable paths for personal development and for career planning.

#### **STEP BY STEP GUIDE**

#### CREATING YOUR PROFILE:MATCH2<sup>™</sup> DEVELOPMENT TEMPLATE

When you log in to Profile:Match2<sup>™</sup>, you will arrive at the 'Create Assessment Template' page (see Image 4.1 below). You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

TOTAL BELESTED COMPETENCIES	0			Templates Crewco	_	Hover over the outport neic to sech competency for a doculed dowington.
DOAL SECIENT		INTERPERSONAL		ETWORRY .		01 Solarit your empiried considers' as in the endow, laft, or choice an unising create from the pull own Temples Prompts.
RATIN'NS	0	CONSUMPTION SPALS	0	RATS	0	and the second
REPORTED.	0	E-INCLUSION .	0	Cristel .	0	02 Choses the type of recent you need below - Selection, Development or 360
NRAISS D-245	0.	IGAPTACUS	0	BUBBOR NAVES	Ø	03 Provine your chosen competention for Setter or or Development Reports or view a semple 340 Pepert
	ω	Records and Sector	Ο		Φ	04 Closion the SARE button to Trisine your template
PEACE SHADOOF	0	ROLENBALDER	0	PERMIT	0	
IN REPORTED IN	0	1023190-19	0		Ο	05 Alement why if you sount to cance a Job Analyse Subray click an the bulker beloe
						JOB ANNUYS S
ATE/40317-00748	0	UKBUPNTIKA,	0			SURVEY
-	0		0			SELECTION PREVEN SAVE
DECEMBER IN NEWSCREAT	0	READER .	0			
	0	BITE LIVER	0			DEVELOPMENT REVEL
		NU-COPERCE	0			ME NEPOTTS

Image 4.1 - Create assessment page

Next choose the competencies you want to include in your template. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu.

You can include up to 10 competencies in your template simply by clicking on them (see Image 4.1). If you change your mind, you can re-click the competency and it will be deselected. From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click 'Development Reports' on the right hand side of the page, and then click 'Save'.



#### SAVING YOUR PROFILE:MATCH2<sup>™</sup> DEVELOPMENT TEMPLATES

The next page is the 'Save Development Template' page, where you need to fill in each of the fields (see Image 4.2). See below for more information on what is required in each field.

MY: PERSONAL DEVELOPMI	ENT	FINALISE TEMPLATE DETAILS	INSTRUCTIONS Complete the details requested in the click on the SAVE DEVELOPMENT TEMP, template. After saving, you will be able settings in the MT: ASSESSMENTS area.	ATE button to seve your e to edit these template
TEMPLATE NAME JOB LEVEL ADDESS TO MATCHUP** COST ACCESS CODE EMAIL REPORT TO CARDIDATE? ADMIN NAME	Pesse Scient To Jacob SP Personaanost Personaanost To Too Dia	onadka) 🖷 Na	Once this template has been saved yo instruction email to forward to candida complete the assessment.	
ADMIN EMAL Company Expiry date Notes		•	SAVE DEVELOPMENT TEMPLATE	*

Image 4.2 - Save development template

#### **Template Name**

This is the name of the competency template you create, and it will help you to find it when you next want to use it. It is for your own purposes only; this name will not appear on the report.

#### Job Level

Specify whether the role is non-managerial, junior manager, middle manager, senior manager, or director.

#### Access to Match:Up™

This allows candidates to access Match:Up<sup>™</sup>, the Profile:Match2<sup>™</sup> online coaching tool (this will add additional credits to the cost of an assessment).

#### Cost

This outlines the number of credits your configuration will cost you per person.

#### Access Code

This is the code that the candidates will access the assessment with. A random code is automatically generated and will appear in the box. Please note, the access code cannot be changed.



#### **Email Report to Candidate?**

Checking 'Yes' will automatically send a Personal Development Report to the candidate, which will be sent, as a PDF document, to the email address they used when they registered for the assessment. There is no charge for this service.

#### **Admin Name**

This is the name of the person who will receive the Profile:Match2<sup>™</sup> Report. The system will automatically input the name of the registered client, but you can change this now or later.

#### Admin Email

This is the email address where the Profile:Match2<sup>™</sup> Report will be sent. The system will automatically input the email address of the registered client, but this can be changed when completing the set up or at a later date.

#### Company

This is the name of the company that requires the assessment.

#### **Expiry Date**

This is the date that access to the Profile:Match2<sup>™</sup> assessment expires. This date can be changed later, and you can also 're-activate' an expired template by amending to a future date.

#### Notes

This section is space for you to make notes about the Profile:Match2<sup>™</sup> template.

After you have completed the fields, click 'Save Development Template' in the bottom right hand corner of the screen. A PsyKey Guide, providing instructions for your candidates on how to access the questionnaire will be sent to the Admin Email address you have entered.

#### \*\*IMPORTANT\*\* BEFORE INSTRUCTING CANDIDATES

Please note that if you are NOT an invoiced client, before you send out the candidate instruction sheets you MUST ensure that you have used your credit card to purchase sufficient credits to allow your candidates to take the online assessment. If you have insufficient credits, your candidates will not be granted access to the online assessment when they attempt to log in to complete the questionnaire.



Once you have created a template, it can be viewed and re-activated at any time by clicking on 'My Assessments' and then 'Personal Development Templates', or by clicking 'Personal Development' in the 'My Assessments' box on the dashboard (see Image 4.3 below).

MV: PERSONAL DEVELOPMENT	EXISTING TEMPLATES			
				٩
TEMPLATE NAME	GENERATE RFPORT	EMAIL	COMPS	EDIT
DEF Company Marketing Assistant		۵	۵	, <b>9</b> 4
UEF Company Accountant		Q	同	"
SEARCH FOR TEMPI ATES				

Image 4.3 – Existing templates

Selecting the 'Edit' symbol next to your desired template will allow you to view the details of the template. You will also be able to edit the fields of: 'Template Name', 'Admin Name', 'Admin Email', and 'Notes'. You can also 're-activate' an expired template by changing the 'Expiry Date' to one set in the future.

Selecting the 'Comps' symbol next to the desired report provides a reminder of the competencies that were selected when the template was created (please note, these cannot be changed), whilst selecting the 'Email' symbol will resend the Psykey instruction email to the address written in the 'Admin Email' field.



#### **GENERATING REPORTS**

Personal Development Reports are automatically generated at the time a participant completes the assessment, and can be regenerated subsequently. There are a number of ways to generate Personal Development Reports:

#### **Automatic Generation**

Once the participant has successfully completed the assigned assessment, you will receive an email at the address given during setup in the Admin Email box with the Personal Development Report attached (in .pdf format). Please note, if you selected 'Yes' to the option 'Email Report to Candidate?' (see Image 4.2. above), the Personal Development Report will be automatically emailed to the candidate at no extra cost.

#### **Regenerate Existing Report**

You will also be able to regenerate completed Personal Development Reports from the 'Existing Templates' screen within the Personal Development section of the Profile:Match2<sup>™</sup> website (see Image 4.3 above). Click on the 'Generate Report' symbol next to the desired template, and then select the name of the participant to generate an 'in-browser' .pdf version of the report.

Alternatively, you can use the 'My Usage' screen shown in Image 1.8 of Section 1 above to regenerate a completed Personal Development Report at no additional cost by simply clicking on the candidate's name.



# SECTION 5 – HOW TO SET UP A PROFILE:MATCH2™ 360 FEEDBACK SURVEY

#### INTRODUCTION

P:M360<sup>™</sup> assessments are based on the key competencies for any role. In this approach, an individual's self-ratings of performance are compared to observer ratings from line managers, peers, direct reports or clients. Uniquely, in P:M360<sup>™</sup>, these performance ratings are considered against the background of candidate potential – the extent to which their personality is likely to facilitate performance. This all-round 360° perspective provides a particularly robust assessment, and a sound basis for reviews, appraisals and personal development.

#### **STEP BY STEP GUIDE**

#### SETTING UP A PROFILE:MATCH2™ 360 FEEDBACK SURVEY

When you log in to Profile:Match2<sup>™</sup>, you will arrive at the 'Create Assessment Template' page. You can also navigate to this page from any other part of the website by clicking 'Create: Assessments' on the toolbar at the top of the main homepage.

#### **STEP 1 – SELECTING COMPETENCIES**

You can include up to 10 competencies in your '360 Report' simply by clicking on them (see Image 5.1). If you change your mind, you can re-click the competency and it will be deselected. Your choice of competencies may be driven by an existing competency framework, or by the results of the Job Analysis Survey if you used this, or by looking at suggested competencies for some job roles given in the pull down 'Templates' menu (e.g. Customer Service, Generic10<sup>™</sup>). From this page you can also download a PDF of all the competency descriptions by selecting 'Library: Competencies' in the top toolbar. Once you have selected your competencies, click '360 Reports' on the right hand side of the page, and then click 'Save'.



Image 5.1 – 360 report page



#### **STEP 2 – SURVEY SETUP**

Each survey you create needs to be setup using the 'Survey Setup' page (see Image 5.2 below). Each of the following criteria needs to be completed in the boxes provided. See below for more information on what is required in each of the fields.

MY: 360		SURVEY SETU	<b>`</b>		INSTRUCTIONS	38
					Complete the details requested in the fu click on the CONTINUE 360 SUBVEY buttor step.	form on this page and in to proceed to the next
Step 1 Ste	p2 >	Step 3	Step 4	Step 5		
SURVEY NAME ACCESS TO MATCHUP 360 **	The part of a	eda(⊜He				
COST COMPANY	149-04018					
ADMIN NAME					CONTINUE 360 SURVEY	<i>)</i> 2.
ADMIN DAAL						

Image 5.2 – Survey setup

#### Survey Name

This is the name of the survey you will create, and is used to identify it in the 'Existing Surveys' area.

#### Access to Match:Up 360<sup>™</sup>

This allows candidates to access Match:Up<sup>™</sup>, the Profile:Match2<sup>™</sup> online coaching tool (this will add additional credits to the cost of an assessment).

Cost

This outlines the number of credits this will cost you per person.

#### Company

This is the name of the company that requires the 360.

#### Admin Name

This is the name of the administrator for this survey. The administrator is the person who will be the first point of contact for candidates and raters taking the survey in the case of any queries. The system will automatically input the name of the account holder, but this can be changed.

#### Admin Email

This is the email address of the administrator for this survey. The system will automatically input the email address of the account holder, but this can be changed.



#### **Expiry Date**

This is the date that access for each candidate and rater completing the survey will expire. Please ensure that you allow enough time for the assessments to be completed.

Once all the above information has been entered, click 'Continue 360 Survey' to go to Step 3 of the survey set up.

#### **STEP 3 – OPEN-ENDED QUESTIONS**

Each Profile:Match2<sup>™</sup> 360 Survey can include a number of selected open-ended questions (OEQs) or extra questions constructed by the survey manager (see Image 5.3). These are both optional extras.

MY: 360	OPEN ENDED QUESTIONS (DEQs)	INSTRUCTIONS
coecting session. IMPORTANT CONSIDERATIONS	Step 3 Step 4 Step 5 stores to your PMDIO <sup>®</sup> survey. Perconness to DEDs will appear only in th <sup>2</sup> or Paper. OID responses cannot be cannot be the system, their the stration can be managed constructively within a face to face feedback or my resers. Thy to include OEDs only for those competencies where you think the asisting survey litent response. Auestorns? YES NO	<ul> <li>Indicate your decision using the YEI or N0 buttons.</li> <li>To remove the question for any competency, de-select the indicate tick-box.</li> <li>To change a question click the (DIT button and change the bad, to revert to the default question, click the DITALLT button.</li> </ul>
		CONTINUE: 560 SURVEY

Image 5.3 – Open ended questions

At this stage, you will be asked if you want to include open-ended questions to gain further information about the candidate. Selecting 'No' will take you straight to Step 4. If you choose yes, you will be given the opportunity to overwrite or omit the question relating to each competency (see Image 5.4 below). Please note, answers to OEQs will only be included in the Profile:Match2<sup>™</sup> 360 Coaching Report, and not in the Feedback Report. The Feedback Report is designed to be given to the candidate while the Coaching Report is used by the coach or line manager and contains deeper insights into the pool of information generated by the P:M360<sup>™</sup> system.



MY: 360	OPEN ENDED QUESTIONS (OEQs)	
		To add open ended questions (OEQs) to your P-M360 <sup>TM</sup> survey:
Step 1 Step 2	Step 3 > Step 4 Step 5 >	01 Indicate your decision using the YES or NO buttons.
You have the apportunity to add Open Ended C	Austions to your P-M300 <sup>re</sup> survey. Responses to DIGs will appear only in the Rest Report, OED responses cannot be centered by the system; they inclusion	02 To remove the question for any competency, de-select the NetLIOE tick-box.
adely in the Coaching Report ensures that this coaching session.	Back Report. OEO responses cannot be censored by the system; they inclusion internation can be managed constructively within a face to face heetback or	03 To change a question click the EMI button and change the test. To revent to the default question, click the
	urvey raters. Try to include OEOs only for those competencies where you think ve the existing survey term responses.	the text. To revert to the default question, click the INTAULT button.
Do you want to include any Open Ende	d Questions?	
Communication Skills	Include?	
From your pain observations, can you Rustrate asjoe	na of this person's communication skills?	
Customer Focus Bulante a spolloait esset of the pener's peter Interpenantal Solls	ance with pustomers and clients. EDIT	
Can you illustrate this person's typical interpersonal	T03 Tvorenolise	
Can you Bustrate from your own observations the ex-	with anoth this partice can be feasible?	a second s
Problem Solving	and a worke has because the standard	CONTINUE: 21
Can you illustrate this person's protinent autoing caps	elity? ED/T	360 SURVEY

Image 5.4 – OEQs – Yes

If you wish to edit the default question or include your own question, click on the 'Edit' button and make the necessary changes to the field. To revert to the original question, simply re-click the 'Default' button. If you do not wish to include an OEQ for a particular competency, make sure the box in the 'Include?' column is left unchecked. When you are finished, click the 'Continue 360 Survey' button in the bottom right hand corner.



#### **STEP 4 – EXTRA QUESTIONS**

You can choose to give raters the opportunity to add more general comments about the candidate's performance by asking extra questions (see Image 5.5 below). Again, responses to these questions will only appear in the Profile:Match2<sup>™</sup> 360 Coaching Report, and not in the Feedback Report. Selecting 'No' will take you straight to Step 5. If you choose 'Yes', you will be given the opportunity to select which questions you wish to include (see Image 5.5 below).

MY: 360	EXTRA QUESTIONS		INSTRUCTIONS	1
Step 1 Step 2 In this section you can give survey participants performance. Percentees will access only in the to the candidate. Then Question name response would be too negative, internative or contemport Perport ensures that this information can be use <b>INFORMATION CONSIGNATIONS</b> Bocause of the additional demands any further questions only where you here that responses at Dis you wish to include any Extra Question Interesting personal characteristic that downsions	ADBOY Consisting Report, and not in the in cannot be canadom by the system and in ductive for inclusion in a Freedback. Report ed constructively within a face to face fee patients would make on survey stem, we likely to provide valuable entra insights to sha?	Profile about the conditioners PADDO <sup>TH</sup> Friendback Report This pose may have been supressed in ways that is their induction in the Conciling about or coaching session. In workd judging you to include these of the coaching session.	To add extra questions to your Pit 01 Indicate your decision usin 02 To remove a question, de-	
What single improvement would name the greatest di to there are other point that you wish to make about	And the second sec	EDIT 2		
			CONTINUE: 360 SURVEY	ž

Image 5.5 – Extra questions

If you wish to amend the default question or include your own question, click on the 'Edit' button and make the necessary changes to the field. To revert to the original question, simply re-click the 'Default' button. If you do not wish to include an extra question, make sure the box in the 'Include?' column is left unchecked. When you are finished, click the 'Continue 360 Survey' button in the bottom right hand corner.



#### **STEP 5 – SURVEY SUMMARY**

The setup process has now been completed, and this screen shows a summary of the details of your survey (see Image 5.6 below). If you would like to edit any of the survey details, click 'Step 1', 'Step 2', 'Step 3', or 'Step 4' above to return to this section and edit.

Simp 1	Rep 7	Step 3	Step 4	State 1	$\rightarrow$	through the reat or again.
				114	B	You per skip addl clicking Faul dat
BURNEY NAME	Carolin Securi				10.15	You can add Carw 360 area of why Jon
COMPANY	ARC Carryon's					
ADMIN NAME	Supra Sarah			-		
ACMIN CAME	oproduction	elen de				
EXPRESSION	16/90/1018					
COMPETENCIES Interpretation Delite	Team	Delvertation				A00 GANDIDATES
OPEN ENDED OUESTI Interpensional Skills Can you Rustrate this per		adamena bayena	rca7			
Can you say what is died	ncive about this	person's approach	to team situations			FINALISE SURVEY
EXTRA QUESTIONS 1 Is there are particular spect	characteristic T	ut contribution mone	te the candidate's	aucons in their p	-	
What single improvem present role?	ere would make	the grounds offerer	ce to the candida	te's performance i	Teir	
h here are ofter per-	f their you wind it	to make about the lat	-Sidely work pro-	Accessorial?		

Image 5.6 - Survey summary

#### **Finalise Survey**

Clicking 'Finalise Survey' will give you the 'Save Survey' prompt shown in Image 5.7 below, and clicking 'OK' will return you to the Profile:Match2<sup>™</sup> dashboard.

Once you have created a 360 survey, it can be viewed at any time by clicking on 'My Assessments' and then 'My 360 Templates', or by clicking '360 Surveys' in the 'My Assessments' box on the dashboard.

#### **Add Candidates**

Please be aware that you can only add candidates to a 360 survey that has been saved. To add candidates directly from the 'Survey Summary' screen, click the 'Add Candidates' button on the right hand side of the screen. The same 'Save Survey' prompt will appear (see Image 5.7), but clicking 'OK' will take you directly to the 'Add Candidates' screen.



Image 5.7 - Save survey



#### **ADDING CANDIDATES**

The 'Add Candidates' screen enables you to enter the name, email address, and job level of each candidate (up to a maximum of 50 candidates per survey). Tick the 'Manage Raters' option if you want the candidate to manage his or her own raters. This means that the candidate will select their own raters when they log into the PsyKey assessment system to take the surveys. Alternatively, if you would prefer to manage the raters on the candidate's behalf, leave this box un-ticked. When you have entered each candidate's details, click the 'Add' button (see Image 5.8).

MY: 360 SURVEY	ADD CANDIDATES	5		7	INST	TRUCTIONS	111
Add candidates to the survey by enter	ng their desails below and click on the $\theta$	00 button Servet MAA	LAGE RATERS Fyou want the da	ndaan 10 aat 🗐	01	An instruction email wi login details can be se candidates as you say the survey. For candidates manag- own raters further instr are included.	int to all is them to ing their
teer own sams. Otherwise, and more Current Candidates EDIT	tor the candidate on the next page.	EMAL	MANAGE RATERS	DELETE	02	You can manage cano and raters in the 360 a Assessments.	fidates rea of MY:
Add Candidate							
Name	Email Address	Job Level	Manage Faters				
Ten Tanya	samiffabooangany.oon	And Margin 1	•				
					SAV AND CON		¥.

Image 5.8 – Add candidates

When you have added all your candidates, click 'Save and Continue' in the bottom right hand corner. Instruction emails will be sent out to your candidates as soon as they have been added to the assessment set up.

If you have selected for all of your candidates to manage their own raters, you will return to the Profile:Match2<sup>™</sup> dashboard. If you have chosen to add raters yourself, you will be redirected to the 'Candidates Needing Raters' page (see Image 5.9 below).



If you have selected for all of your candidates to manage their own raters, you will return to the Profile:Match2<sup>™</sup> dashboard. If you have chosen to add raters yourself, you will be redirected to the 'Candidates Needing Raters' page (see Image 5.9 below).



Image 5.9 - Candidates needing raters

To add a rater, click the symbol in the 'Add Raters' column to the right of the candidate. This will take you to the 'Add Raters' screen, where you will enter a rater's name, email address, and relationship with the candidate (see Image 5.10 below).



Image 5.10 - Add raters

Click the 'Add' button once the required information has been entered to include the rater in the Profile:Match2<sup>™</sup> 360 Survey. Please note, the system will automatically include the candidate as a self rater, but you can choose to edit and/or delete them, or any other rater, by clicking on the relevant symbol.



Once all raters have been added, click the 'Save and Continue' button in the bottom right hand corner of the screen.

Please note, if you choose to include a Peer, Direct Report, and/or Client rater in the survey, you will need to include at least three individuals from that category before you can move onto the next stage.

Both candidates and raters are emailed their instructions and unique login details by the Profile:Match2<sup>™</sup> system. If the candidates have been asked to manage their own raters, instructions explaining how to add raters will automatically be sent to each candidate as you add them to the survey (see Image 5.11).

### Arrangements have been made for you to complete the following two assessments online: PROFILE:MATCH<sup>™</sup> PROFILE:MATCH<sup>™</sup> 360 Quick guide to taking the assessment 1) Go to http://www.psy-key.com/PM360 2) If prompted, please enter the details below. Access Code: 573-20834 User Name: Sam@abccompany.com Password: RSp46dgX0 3) Follow the on-screen instructions Each Assessment should take between 10 to 20 minutes so please ensure that you have sufficient time to devote to uninterrupted completion.

In the unlikely event that you encounter any error messages when taking a test please visit our online FAQs at:\_ http://www.psy-key.com/help/\_\_\_\_\_

We recommend that you complete this assessment using a desk top or lap top computer. Although it is possible to use some tablets and smart phones, technical specifications vary widely and technical functions may be compromised on some of these devices.

Kind regards PROFILE:MATCH<sup>®</sup> Administration +44 (0) 1892 559 540

Dear Sam Sample

Image 5.11 - Example of a candidate email



#### EDITING YOUR PROFILE:MATCH2<sup>™</sup> 360 SURVEY

Once you have created and saved your Profile:Match2<sup>™</sup> 360 Survey, you will be able to access and edit it from the 'Edit Survey' screen. Clicking 'My Assessments' in the main toolbar and selecting 'My 360 Templates', or clicking '360 Surveys' in the 'My Assessments' box on the dashboard, will take you to the 'Existing Surveys' screen (see Image 5.12).

		Ę
360 Survey Name	Company Name	Close Date
ABC Company HR	ABC Company	14/10/2016
ABC Company Operations Manager	ABC Company	31/10/2016
ABC Company Customer Service	ABC Company	20/10/2016
ABC Company Sales Director	ABC Company	30/09/2016
ABC Company IT	ABC Company	16/09/2016
ABC Company Accountant	ABC Company	21/09/2016
ABC Company Research	ABC Company	31/08/2016
ABC Company Janitor	ABC Company	03/08/2016
ABC Company Marketing	ABC Company	29/07/2016
ABC Company Sales	ABC Company	28/07/2016
Records per page: 10	Records: 1 - 10 of 171 - Pages:	2 3 4 5 + + (out of 18) Ga to page

Image 5.12 - Existing surveys

Clicking the symbol in the 'Edit' column to the right of the relevant survey will then take you to the 'Edit Survey' screen (see Image 5.13 below). From this area, you will be able to view and edit the details of the survey, candidates, and raters, as well as generate reports.

The 'Edit Survey' screen includes the survey name, company name, and expiry date of the survey, as well as additional details about each candidate in the Profile:Match2<sup>™</sup> 360 Survey. See below for more information on each of the options.





Image 5.13 - Edit survey

#### Show Competencies

Clicking this button will show which competencies were selected when the Profile:Match2<sup>™</sup> 360 Survey was created.

#### **Open Ended Questions**

Clicking this button will show the open ended questions included in the Profile:Match2<sup>™</sup> 360 Survey (if these were chosen when creating the survey).

#### **Extra Questions**

Clicking this button will show the extra questions included in the Profile:Match2<sup>™</sup> 360 Survey (if these were chosen when creating the survey).

#### Group Email

Clicking this button will send each of the candidates an email with instructions outlining how to complete the Profile:Match2<sup>™</sup> 360 Survey.

#### View and Edit Candidate Information

Click the symbol in the 'Edit' column to the left of the candidate to view and edit their information (see the 'Edit Candidate Details' section below).

#### Status PM

This is the status of the Profile:Match2<sup>™</sup> questionnaire taken by the candidate, and shows whether the survey is 'Not Started', 'Pending', or 'Complete'.

#### Status 360

This is the status of the Profile:Match2<sup>™</sup> 360 Survey taken by the raters, and shows whether it is 'Not Started', 'Pending', or 'Complete'.



#### Manage Raters

If this option was selected when the survey was set up, each candidate will manage his or her own raters. If this option was not selected, you will need to add raters for your candidates. Please note that even if a candidate is managing their own raters, you will still be able to view rater information and add new raters.

#### Raters

This is the number of raters that have been added for each candidate. To view rater information, you will need to click the 'Edit' symbol to the left of the candidate (see 'Edit Candidate Details').

#### **Generate Report**

When candidates have completed the survey, click this button to generate a report (see the 'Generate Reports' section below).

#### **Resend Candidate Instruction Email**

Click on the symbol in the 'Email' column to the right of the candidate to resend the Profile:Match2<sup>™</sup> 360 Survey instruction email. This contains the unique login details required by the candidate to complete the survey and the instructions about identifying raters (if the candidate is adding their own raters).

#### Delete

Click on the symbol in the 'Delete' column to the right of the candidate to remove the candidate from the Profile:Match2<sup>™</sup> 360 Survey.



#### EDIT CANDIDATE DETAILS

Clicking the symbol in the 'Edit' column to the left of the candidate will take you to the 'Edit Candidate Details' screen, where you can edit the candidate's name, email address, age, gender, and ethnicity (see Image 5.14). Please note, this screen also allows you to add additional candidates and edit candidate details after the survey has been created. See below for more information on each of the options.

MY: 360 SURVEY	EDIT CANDID/	ATE DETAILS				INSTRUCTIONS
						3
		-	_		٥	Edit the details requested in the form on this page and click on the SAVE AND RETURN button to save and return to Edit Survey.
NAME	there, Sanger		_			Add demographic information about the candidate if required.
EMAL.	smontpaymorpes-consultancy.com					On this page you can also add or delete
ACCESS CODE	Pwww.eee.c20					raters and edit existing raters, as well as email individuals or groups of raters.
ME						
GENCER	Passe Select		24			
ETHNICITY MANAGE RATERS						
						SAVE
Current Raters EDIT NAME	BAAL	RELATIONSHIP	STATUS 360	EMAL	DELETE	AND RETURN
A Sharon Sample	sharon@abccompany.com	Client	Not Started	4	I	RC LORN
/ Sen Serple	sam@ebccompany.com	Direct Report	Not Started	\$		
# Shelley Semple	shelley@abccompany.com	Surf	Not Started	•		
	and a second part of the second			-		
Add Rater						$\rightarrow$
Name	Email Address	Relationship				
		Please Select	A00			

Image 5.14 - Edit candidate details

#### Manage Raters

If this option was selected for a candidate when the survey was created, that candidate will manage his or her own raters. If this option was not selected, you will need to add raters for each of your candidates. Please note that if a candidate is managing their own raters, you will still be able to view rater information and add new raters.

#### View and Edit Rater Information

Clicking the symbol in the 'Edit' column to the left of the rater will take you to the 'Edit Rater Details' screen, where you can view and edit the rater's name, email address, age, gender, and relationship to the candidate.

#### Relationship

This column demonstrates the rater's relationship with the candidate, and highlights whether they are a 'Manager', 'Peer', 'Direct Report', or 'Client'.



#### Status 360

This is the status of the Profile:Match2<sup>™</sup> 360 Survey, and shows whether the survey is 'Not Started', 'Pending', or 'Complete'.

#### **Resend Candidate Instruction Email**

Click on the symbol in the 'Email' column to the right of the candidate to resend the P:M360<sup>™</sup> Survey instruction email. This contains the unique login details required by the candidate to complete the survey, and instructions about identifying raters (if the candidate is managing their own raters).

#### **Deleting Raters**

You can delete a rater from the 360 process by clicking on the symbol in the 'Delete' column to the right of the rater.

#### **Adding Raters**

To add a rater, input their name, email address, and relationship to the candidate, and click the 'Add' button. Even if the candidate is managing their own raters, you can still add raters yourself.

#### **GENERATING REPORTS**

To generate a report for a candidate, go to the 'Edit Survey' screen and click the symbol in the 'Generate Report' column to the right of the candidate. This will take you to the 'Generate 360 Reports' screen (see Image 5.15), where you can select which raters to include in the generated report by ticking the box in the 'Include' column to the right of their name.

MY: 360	GENERATE 360 R	EPORTS			INSTRUCTIONS	ŝ
RATER NAME	EWAIL	COMPLETED	RELATIONSHIP	NOLISE	To generate 360 reports plea the Riders you want to includ list on the left. For Managers be 1 rater but for all other gro least 3 raters must be include	this could bups at
Catherine	catherine@psychological-consultancy.com	Complete	Self	6		
Joanna Bioggs	catherine@psychological-consultancy.com	Complete	Peer			
Joe Bloggs	catherine@psychological-consultancy.com	Complete	Manager			
Joee Bloggs	catherine@psychological-consultancy.com	Complete	Peer			
Joey Bloggs	catherine@psychological-consultancy.com	Complete	Peer	1		
					BACK TO EXISTING SURVEYS	ji.
						>
					CONTINUE TO	<u>بې</u>
					RÉPORTS	>

Image 5.15 - Generate 360 reports

Once you have selected your raters, click the 'Continue to Reports' button in the bottom right hand corner of the page.

A prompt will ask if you want a 'Feedback' report or a 'Coaching' report (only available to those with confirmed experience or training). Please note, if the report option was not included in the original configuration for the template you can create one here for an additional fee.

Once selected, the Profile:Match2<sup>™</sup> system will generate a downloadable PDF of your desired 360 report.

360 Reports can also be generated from the 'My Usage' screen (see Image 1.8 in Section 1). You can locate the desired report by searching for the candidate's name, or by the date in the assessment was completed. To view the report, simply click on the candidate's name and follow the onscreen instructions. Please note, if the report option was not included in the original configuration for the template you can create one here for an additional fee.