BEHAVIOURAL ANALYSIS I HOW TO: Get an individual to complete an assessment

1. Sending instructions by email

To invite your candidate, by email, to complete the Extended DISC questionnaire, please copy the template below and send it to them.

Template to send to your candidate:

The following are the instructions for you to log on and complete a Behavioural Assessment.

Please ensure you read the Extended DISC Candidate Instructions carefully before starting the questionnaire, take no longer than 10-15 minutes to complete the questions and are not interrupted during the process.

- Go to https://www.finxs.com
- Enter the access code _____ in the first field that appears.
- Select "I will do it now".
- Enter your details. Please take care to enter your name in the correct order.
- If English Australasian is not your preferred language, select "Change Language" and choose from the available options.
- Follow the online instructions from there.

* Please note, you will not receive a copy of the result upon completion, so please do not answer the questionnaire again. The result will be shared with you in due course.

* * System is case & space sensitive – so make sure no extra space is included.

2. Sending instructions from the FinxS platform

Alternatively, if there is a behavioural project set up in your FinxS account called 'Behavioural Analysis w/Password', you can invite your candidate(s) to complete the questionnaire directly from the FinxS platform, by following the steps below:

- Log into your FinxS account.
- Go to the 'Projects' tab along the top of the screen and select 'Behavioural Analysis' from the dropdown menu.
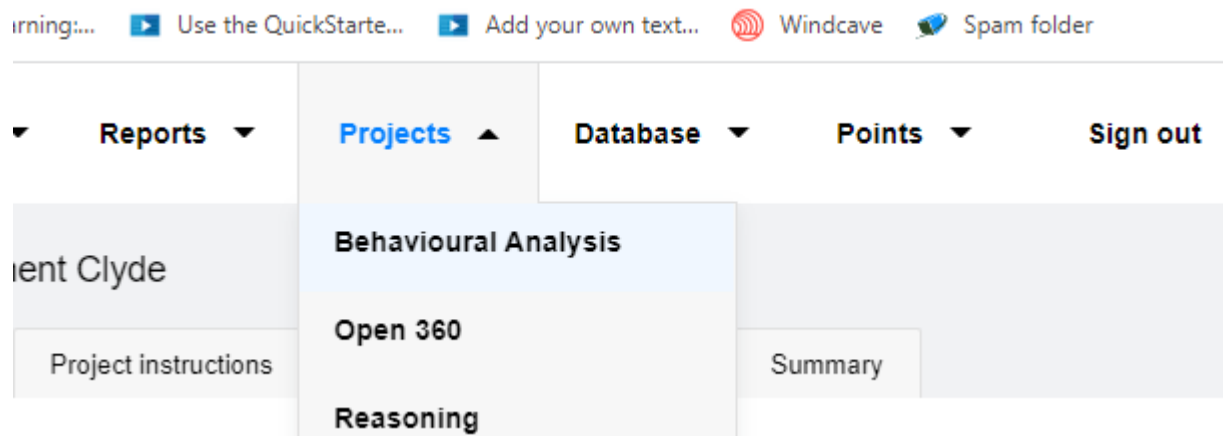
- Select the Behavioural Analysis project in the left-hand column called 'Behavioural Analysis w/ password'. (See the image below). Note: If you do not have a project with this name, and you would like to be able to use this method, please contact HR Profiling Solutions to get one set up.

- Click on the "Allowance" tab (see the image above). A new screen will appear. Press EDIT (blue button on the far right of this new screen).
- Click on the box containing the words 'Add Respondent'.
- Boxes to enter your candidate's first name, last name and email address will appear. Enter their details.
- You will see that a password is also produced.
- Click SAVE (blue button over on the far right of the screen).
- The word 'Action' will appear beneath the words 'Known Respondents', along with two boxes containing the words 'Send invitations' and 'Send reminders'. If you are ready to send the invitation to your candidate, click the 'Send invitations' box. Or, you may wish to add more respondents first.

Known Respondents	Yes
Action	Send invitations: 1 Send reminders: 0

Add Respondent

- You can choose to 'Send reminders' at an appropriate time in the future, if you wish.

- If you have numerous candidates, rather than adding them in one by one, you may prefer to upload them from a spreadsheet. To do this, instead of clicking 'Add Respondent', you can click on the 'Sample' button on the right to download a spreadsheet to use. The first name, last name and email addresses of your candidates must be entered. (You will first need to click on the 'Enable Editing' button in the top centre of the spreadsheet). 'Save' a copy. NB: it must be saved in the Excel 97-2003 Workbook version. (It will automatically do this and save to your Downloads, if you simply 'Save' it). Then click the 'Upload' button. Your candidates' details will appear. If you have a spreadsheet already prepared, you can simply click 'Upload'.