



THIS GUIDE HELPS YOU SET UP PI SOFTWARE TO COMPLY WITH GDPR

BROUGHT TO YOU BY  
HUMANOSTICS  
- YOUR PI CERTIFIED ELITE PARTNER



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NAVIGATE FROM THIS MENU



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## WHAT IS GDPR?

The European Parliament adopted the GDPR in April 2016, replacing an outdated data protection directive from 1995. It carries provisions that require businesses to protect the personal data and privacy of EU citizens for transactions that occur within EU member states. The GDPR also regulates the exportation of personal data outside the EU.

## COMPLIANCE

Complying to GDPR requirements entails a range of initiatives, one of which is that you set up PI Software to only store data for the period of time to which you have consent.



## THE PREDICTIVE INDEX

- ❖ The PI IT platforms comply with the most stringent of standards in terms of data access and IT security.
- ❖ The Predictive Index, LLC adheres to the “Standard Contractual Clauses”, which are nonnegotiable terms put forth by the EU Commission, for the allowance of transfer of data beyond EU borders.
- ❖ PI Software is designed to help you easily comply with GDPR in terms of anonymising data.

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## CONTRACTUAL AGREEMENTS

The relationship between you and us (Humanostics) is captured in the subscription contract already signed by you and Humanostics acting as PI Certified Elite Partner of The Predictive Index.

The Predictive Index is the main **Data Processor** and we have an agreement with The Predictive Index as their sub-processor.

You are the **Data Controller**, and as data controller you are obligated to stay up-to-date with the relevant data protection legislation (GDPR in Europe).

A data processor agreement between the Data Processor (The Predictive Index) and the Data Controller (you) should be signed. All you have to do is reach out and we will provide the agreement for you to sign.

## RECOMMENDATION

This guide provides our recommendation to you in regards to how you process your data in PI Software, and these recommendations are based on GDPR in Europe.

We emphasise that the recommendation does not cover all aspects of the initiatives required to show compliance with GDPR and as data controller you have a range of obligations and responsibilities to fulfil and you have probably already sought appropriate guidance from other parties.

## OBLIGATIONS

In respect of PI assessments, you are obligated to develop an appropriate data/privacy policy. This includes:

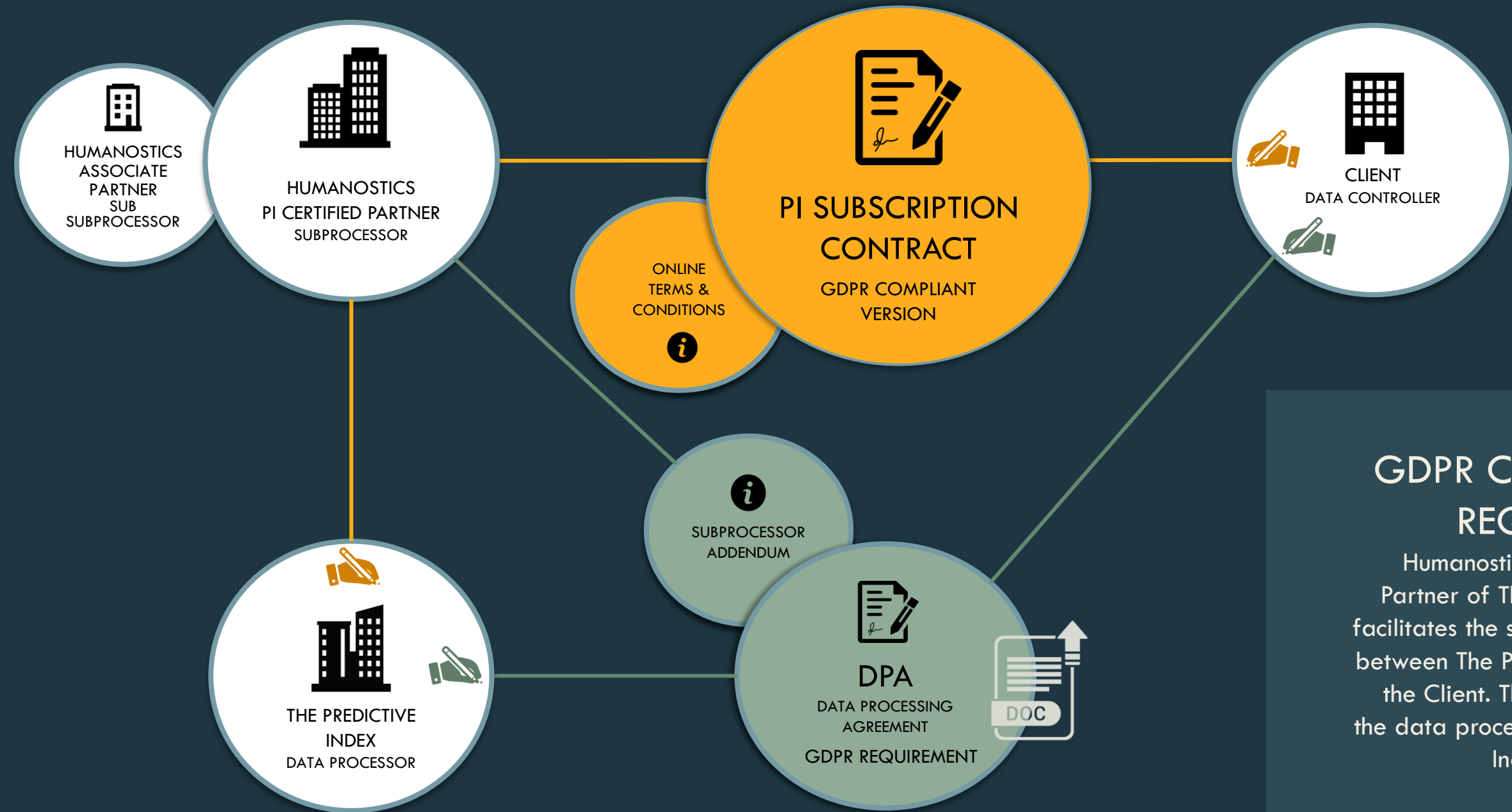
1. Determine how long you will store PI related data.
2. Inform candidates/employees that you are storing their data, how long you will be doing so and for what purpose.
3. Set up a process to anonymise data, when the defined storage period has expired.

### DEFAULT PI STORAGE SETTINGS

PI Software stores personal data until manual removal.  
Set up the systems to reflect your decision on storage.

# DOCUMENTS AND SIGNING PARTIES


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### GDPR COMPLIANCE REQUIREMENTS

Humanostics (PI Certified Elite Partner of The Predictive Index) facilitates the subscription contract between The Predictive Index and the Client. The DPA is signed by the data processor (The Predictive Index) and the Client.

# PI SOFTWARE - STEP BY STEP

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THE PROCESS OF STEPS TO TAKE TO SET UP THE SOFTWARE. BE SURE TO REACH OUT IF YOU HAVE ANY QUESTIONS.

Step 1	Step 2	Step 3	Step 4	Step 5	HELP
<b>SORTING</b> The process to ensure compliance begins with sorting your data. All employees need to be moved to relevant folder(s)	<b>CATEGORISING</b> The process will only work if you categorise your data. All employees need to be marked with the type 'Employee'	<b>SETTINGS</b> In PI Software you set up the system to automatically anonymise profiles not categorised as 'Employees' after a certain number of days	<b>INFORMATION</b> You insert a standard text to be included when you issue a link to PI BA informing the assessment takers of your data processing	<b>DISCIPLINE</b> Your users of the system categorise profiles as 'Candidates' and 'Employees' in a well-disciplined way	<b>CONTACT</b> The Humanostics team can assist if you are in doubt or need advice etc.  We are here to help!
					

EACH STEP IS DETAILED IN THE NEXT FEW SLIDES

# STEP 1 - CLEAN UP

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## SORT YOUR DATA - MOVE EMPLOYEES TO RELEVANT FOLDERS

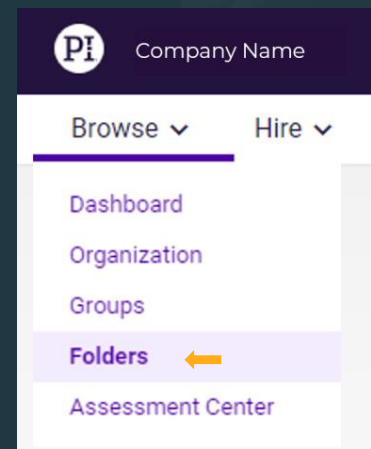
The first step is to sort your data, and this includes moving all employee profiles to your employee folder(s). Your employee folder(s) should contain existing employees' profiles only.

### HOW TO MOVE PROFILE(S)

1. In 'Folders' 'click on a folder that contains employees
2. Tick-mark the people you want to move to your employees folder(s)
3. Click on 'Admin'
4. Choose 'Update Folder'
5. Find the relevant folder using the search field
6. Click 'Update Folder Assignment'



WATCH HOW-TO-VIDEO



### Browse Folders

Select People and Jobs from your Folders to quickly perform actions on.

**Folder:** Folders / Humanostics Demo / HUMANOSTICS / KLY / Employees /

Folder Contents	Behavioral Report	Placard	Personal Development Chart	Manager Development Chart	Columns	Admin	Actions
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Name	Job	Last Modified	Type	Behavioral			
<input checked="" type="checkbox"/> Becker, Sabine	Head of Innovation	2018 December 6	Employee				
<input checked="" type="checkbox"/> de Jong, Emma	HR Consultant	2018 October 23	Employee				
<input checked="" type="checkbox"/> Doe, Jane	HR Consultant	2018 September 26	Employee				
<input checked="" type="checkbox"/> Popielec, Katarzyna	HR Consultant	2018 December 6	Employee				
<input checked="" type="checkbox"/> Robinson, Sally	Financial Analyst	2018 August 15	Employee				

Showing 1-5 of 5      PREVIOUS 1 NEXT      Results per page: 10 50

PI SOFTWARE

Link to the system

URL

- Update Type
- Update Job
- Update Folder**
- Remove Associated Job
- Delete
- Download CSV
- Guardian
- Adapter

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## CATEGORISE YOUR DATA TO AVOID AUTOMATIC ANONYMISATION OF DATA ON EXISTING EMPLOYEES

All employees need to be categorised with the type 'Employee'. Follow this process to change type

1. Click on 'Folders'
2. Click on the relevant folder
3. Tick mark all profiles in the folder
4. Under 'Admin', click 'Update Type'
5. Select 'Employee'
6. Click 'Save'

Continue to categorise profiles in all relevant employee folder(s).

All the profiles now categorised as 'Employee' will not be automatically anonymised.

**1. CLICK 'Folders' in the top left corner**

**2. CLICK on the relevant folder**

**3. TICK-MARK all persons**

**4. CLICK 'Update Type'**

**5. SELECT 'Employee'**

**6. CLICK 'Save'**

Name	Type	Remove
Andersen, Morten	Candidate	×
Jensen, Peter	Candidate	×
Andersen, Simon	Employee	×

Name	Job	Last Modified	Type	Behavioral	Ref Profile
Andersen, Morten		2018-03-14	Candidate		Craftsman
Andersen, Simon			Employee		
Jensen, Peter	Office Assistant	2018-01-04	Candidate		Captain

# STEP 3 – SETTINGS (ACCOUNT ADMINISTRATORS/OWNERS ONLY)

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## SET UP THE SYSTEM TO AUTOMATICALLY ANONYMISE DATA (ADMINISTRATORS ONLY)

The next step involves setting up the system to anonymise non-employee data

1. Click on your name in the top right corner and choose 'Administration'
2. Click on 'Company Settings'
3. Select 'Bulk Anonymize by Type' under Anonymize People Data
4. Tick mark all types of data
5. Select 'Every Day'
6. Select number of days until anonymisation
7. Click 'Anonymize Records'

After clicking 'Anonymize Records' you will get an overview of data types and the number of each data type which will be anonymised.

**NOTE: THESE SETTINGS AFFECT THE ENTIRE ACCOUNT AND ALL THE FOLDERS IN THE ACCOUNT**

The screenshot shows the 'Administration' page with three tabs: 'User Management', 'Folder Management', and 'Company Settings'. A callout points to the 'Company Settings' tab. Below it is the 'Anonymize People Data' section with a dropdown menu showing 'Bulk Anonymize by Type' selected. A callout points to this option. To the right is the 'Bulk Anonymize by Type' configuration panel. Callouts point to the checked boxes for 'Candidates', 'Former Employees', 'Unknown Entries', and 'Other Entries'. Another callout points to the 'Every Day' frequency selection. A third callout points to the '120' days range selection. A final callout points to the 'Anonymize Records' button.

**THIS STEP IS COMPLETED BY THE ACCOUNT ADMIN/OWNER**



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## INFORM THE ASSESSMENT TAKER OF THE DATA PROCESSING PROCEDURE IN YOUR ORGANISATION

You need to inform the assessment taker (candidate/employee) of the procedure you have for handling their data. Choose to include an implicit or explicit consent.

### IMPLICIT CONSENT

You can insert a standard text that will automatically be included in the invitation email when a PI BA is issued from PI Software stating that the assessment taker, by completing the assessment(s), provides implicit consent for the data controller (you) to use and store their data.

You can use the texts on the next slide as inspiration to tailor a text you find appropriate to include when issuing assessments. Remember to insert your company name and the number of days you have decided to store candidate data.

When the text is ready, please send the text to us and we will help you set it up in the system.

### Administration

Use this page to manage users, folders, and company settings.

User Management

Folder Management

Company Settings

### Assessment Settings

Add consent message here: \*

Explicit consent: Here you can insert a customised message about your data privacy policy etc. - Assessment takers will see this message when they click 'Start' at the beginning of a PI Behavioral Assessment, and they will have to tick a box stating that they accept before they proceed.

### EXPLICIT CONSENT

It is also possible to include explicit consent. This means that the assessment taker will have to explicitly accept your terms before they can complete the assessment.

### CHOOSE IMPLICIT OR EXPLICIT CONSENT.

The processed and stored data is not considered sensitive personal data, which means that implicit consent is sufficient.

TAILOR A TEXT TO BE INCLUDED WHEN ASSESSMENTS ARE ISSUED

## CUSTOMISE THE EMAIL INVITATION TEXT SENT TO ASSESSMENT TAKERS



YOUR TEXT CAN BE INCLUDED AUTOMATICALLY IN THE EMAIL TO THE ASSESSMENT TAKERS WHEN PI BA IS ISSUED AND REFERS TO BOTH PI BA AND PI CA

BELOW IS A SUGGESTED WORDING FOR THE EMAILS:

“We invite you to complete PI Behavioral Assessment™ and/or PI Cognitive Assessment™. By completing the assessment(s) you agree to our data privacy policy and agree that we may use and store your assessment data as described.

If you apply for a job at **xx** your assessment data will be registered and stored in our system for a period of **xx** days. This means that we can reuse your assessment data for potential future recruitment purposes.

If you are an existing employee at **xx** your assessment data will be stored no longer than your employment with us.

Your assessment data is strictly confidential and can only be accessed by relevant authorised personnel at **xx**. Your permission to process and store your assessment data may be recalled at any time, after which your personal data will be removed.

Click [here](#) to read our full privacy policy.”

IF YOU WOULD LIKE TO REFER ASSESSMENT TAKERS TO YOUR OWN PRIVACY POLICY, REMEMBER TO INSERT A HYPERLINK TO AN INTERNET SITE THAT IS ACCESSIBLE BY NON-EMPLOYEES

ADJUST THE TEXT TO FIT YOUR PRIVACY POLICY



## GOING FORWARD: DON'T FORGET TO CATEGORISE PROFILES

Setting up the system to automatically anonymise profiles that are not categorised as employees after x days requires that the users of your account work in a disciplined manner with the categorisation of profiles.

### EXISTING EMPLOYEES:

If you send assessments to existing employees you should indicate type 'Employee' when you issue the PI BA.

When they leave the company remember to anonymise their data.

### CANDIDATES:

If you send assessments to candidates you should indicate type 'Candidate'.

When a candidate is hired you have to move the profile to your relevant employee folder and manually change the category type of the profile to 'Employee'.

Use the process described below to change type.

1. Search for the person via the search field (remember that you cannot search for middle names)
2. Click on the name of the person
3. Click on 'EDIT' next to their name
4. Select 'EMPLOYEE' from the dropdown menu under 'TYPE'
5. Click 'UPDATE'

**IF YOU FORGET TO CATEGORISE YOUR EMPLOYEES  
CORRECTLY THEIR PROFILES WILL BE ANONYMISED  
AND WILL NO LONGER BE AVAILABLE**

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## THE CONTROL PANEL ALLOWS YOU TO DECIDE WHO CAN ENTER YOUR DATA

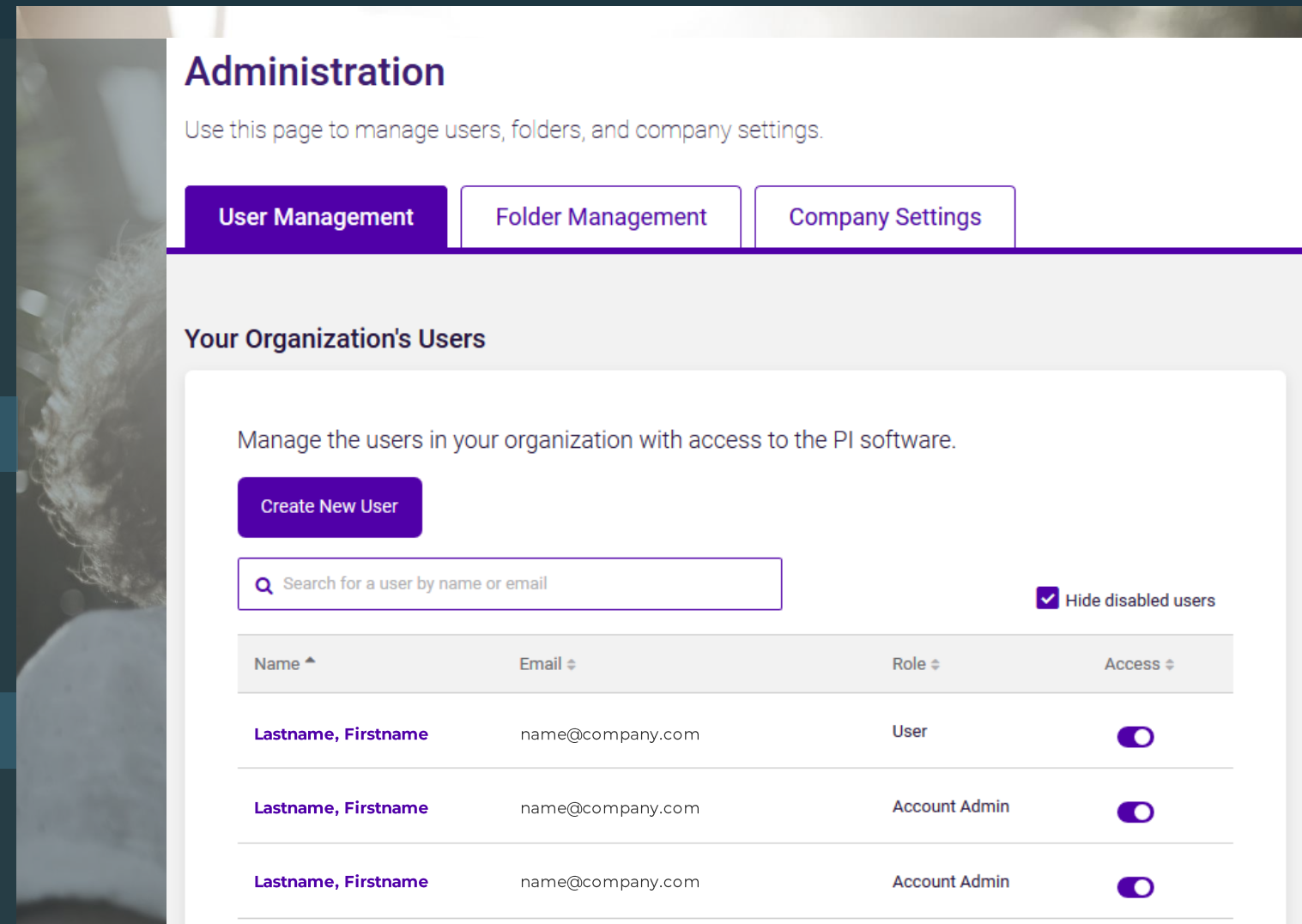
You will find the control panel by clicking your name in the top right corner of the screen and clicking 'Administration'

### USER MANAGEMENT

As an element of GDPR compliance your account administrator/owner controls which folders the different users have access to. They can also create new users.

### THIRD-PARTY EXTERNAL USERS

In order for us to assist and support you going forward we advise you to allow us to access your data. This can be done from the Third-Party External Users section on the control panel. Tick-mark and click 'Select an action' and click 'Enable Access'.



WE HOPE THAT THIS GUIDE PROVIDED YOU THE NECESSARY GUIDANCE AND ASSURANCE IN TERMS OF ENSURING GDPR COMPLIANCE

WE LOOK FORWARD TO CONTINUOUSLY SUPPORTING YOU THE BEST WAY WE CAN !

# CONTACT DIRECTORY - THE HUMANOSTICS TEAM

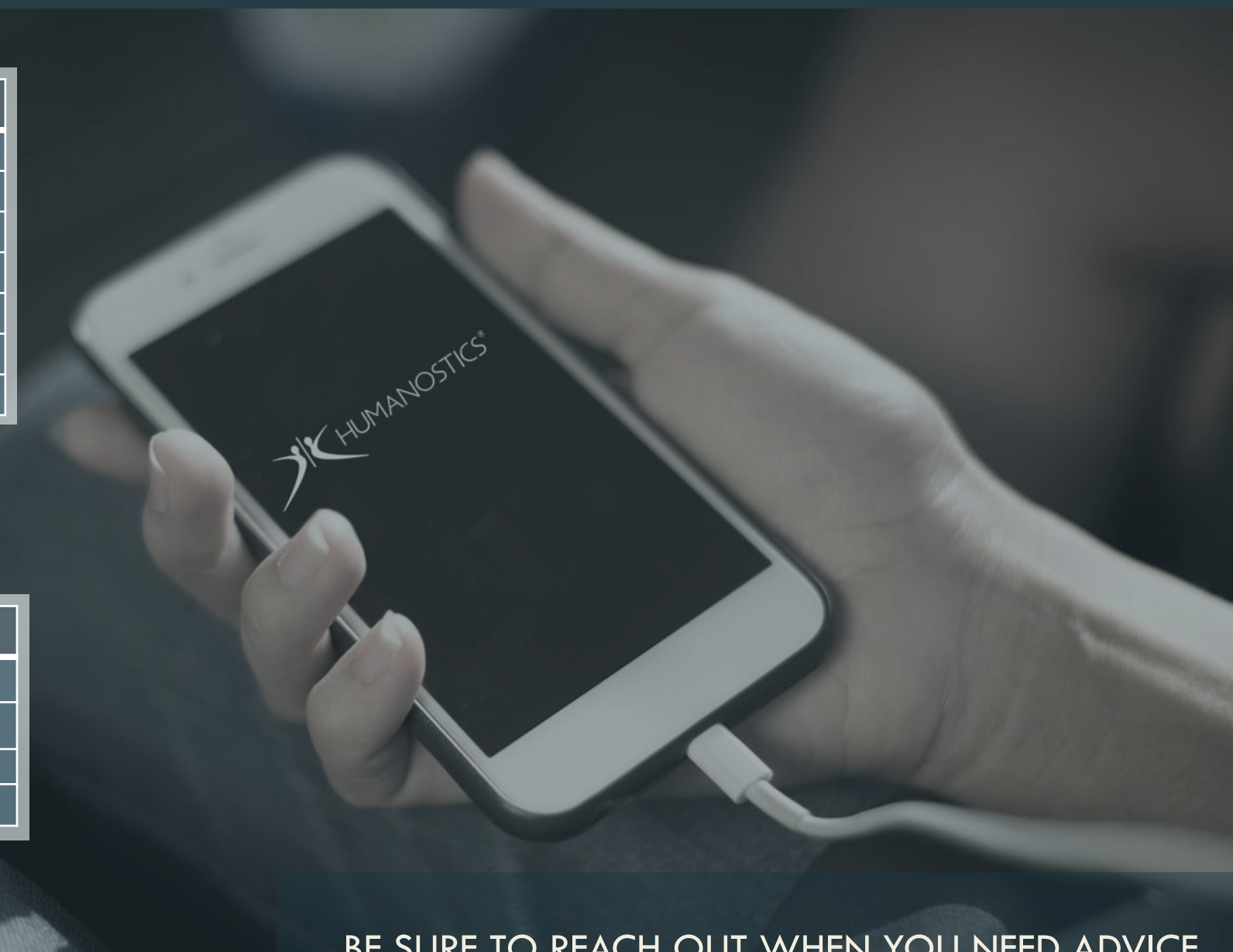
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BE SURE TO REACH OUT WHEN YOU NEED ADVICE.  
THE HUMANOSTICS TEAM IS HERE TO HELP!