USER GUIDE

INDIVIDUAL + 360

CELO

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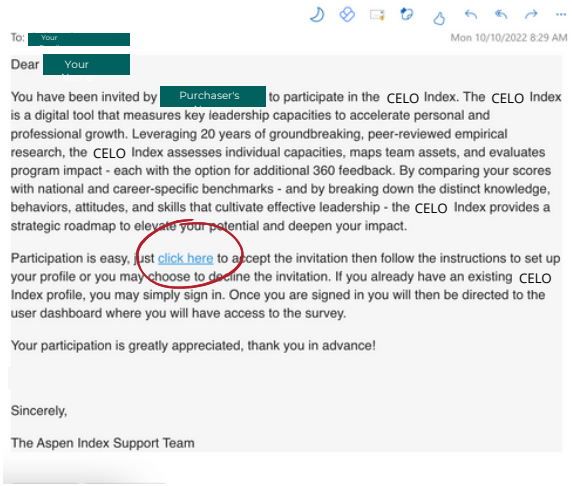
**For Individual + 360 Users*

OPTION 1:
ACCEPT INVITATION VIA EMAIL

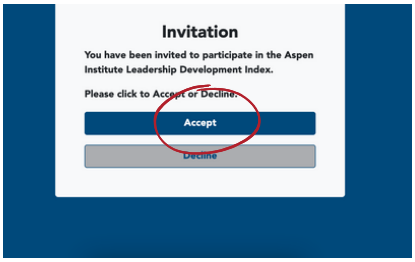
1



You will receive an email from the Index. Select "click here" to begin accepting your invitation.*

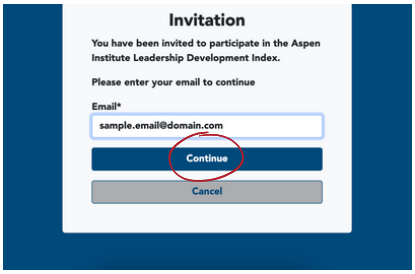
**Emails may initially go to Spam folder.*

2



Select "Accept."

3

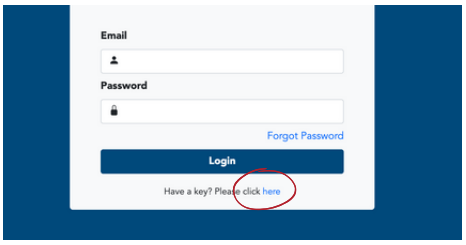


Insert the email in which you received your invitation, then press "Continue."

From this point, if you do not have an account created, you will begin the account creation process. If you already have an Index account, the site will prompt you to log in.

OPTION 2:
REDEEM KEY DIRECTLY

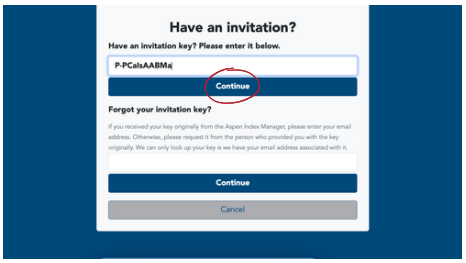
1



Once you receive your key (code), visit my-index.expandingleadership.org/haveAKey

Select "Have a key? Please click here."

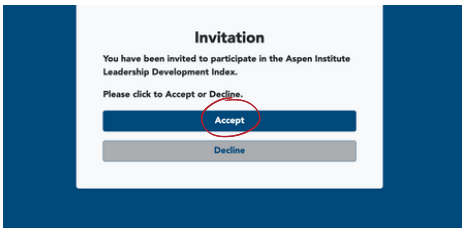
2



Input your key into the box that reads "Have an invitation key? Please enter it below."

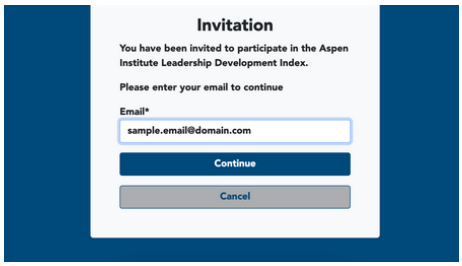
Then, select "Continue."

3



Select "Accept."

4



Input your email and select "Continue."

From this point, if you do not have an account created, you will begin the account creation process. If you already have an Index account, the site will prompt you to log in.

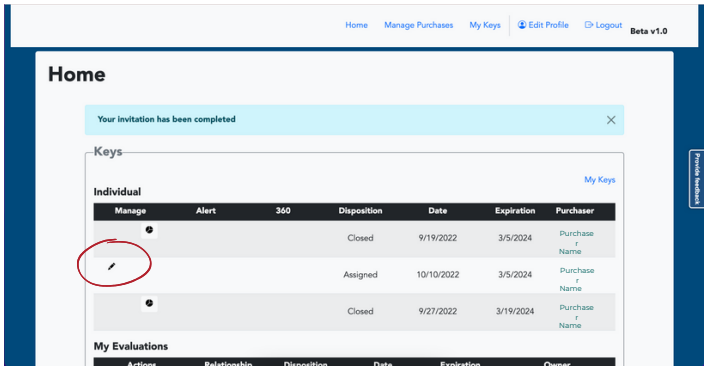
CONFIGURE YOUR INDEX

For both Index: Individual and Index: Individual + 360

If your Index purchaser did not select capacities for you, you will have the option to select your capacities as the user (Step 2).

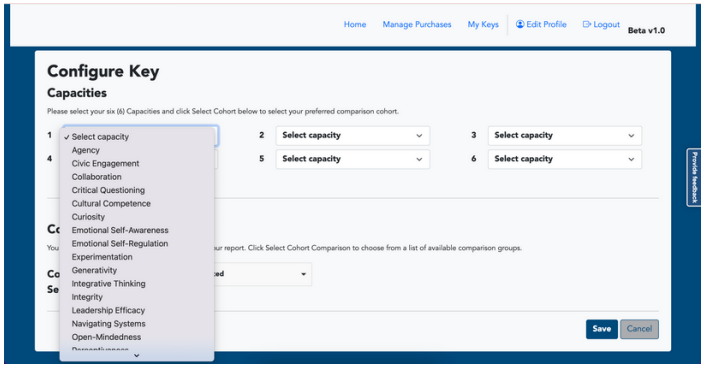
All users will be asked to select their cohort comparison (Step 3).

1



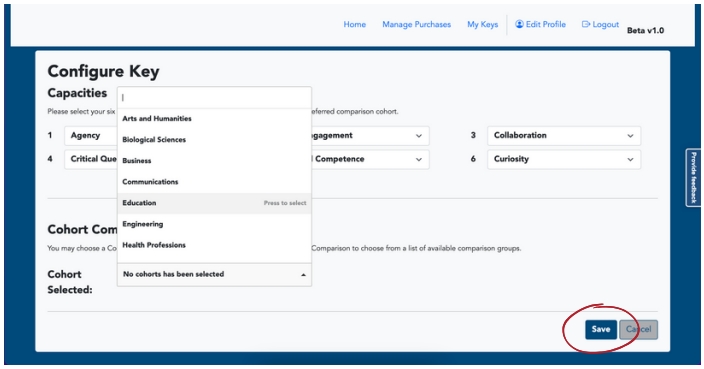
Click the key icon to configure your key.

2



Select the six capacities that you would like assessed.

3



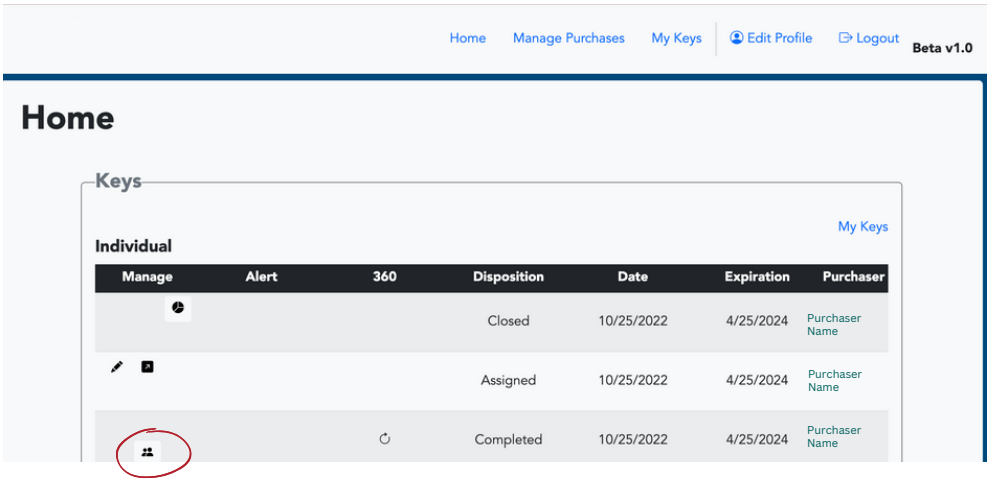
Select your cohort comparison group, review your selections, and click "Save."

A cohort comparison group is a tool to assess your results in comparison to other Index users in your selected field.

ADD YOUR EVALUATORS: INDIVIDUAL + 360

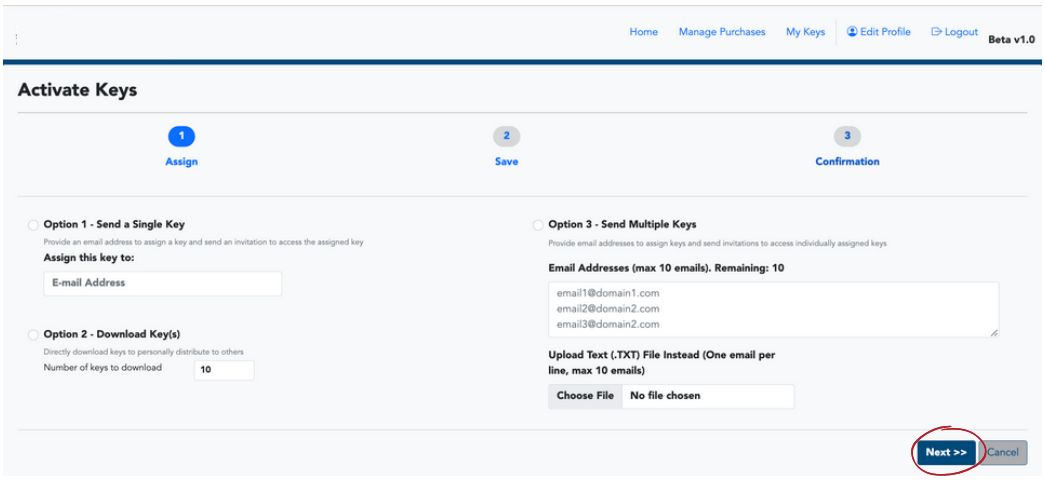
Once your key is configured for capacities and cohort comparison groups, you will have the option to add your evaluator(s).

1



Click the person icon to add your evaluator(s).

2



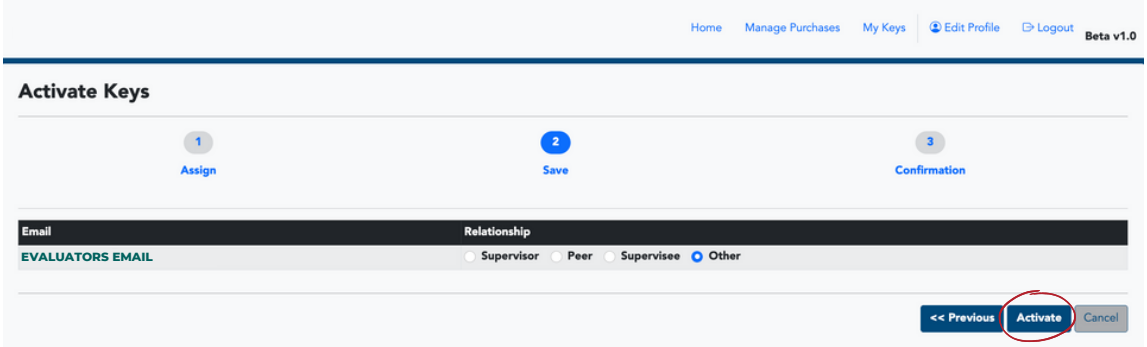
There are four options to invite your evaluators:

- Option 1: Send a single key to one evaluator.
- Option 2: Download keys / codes to send to evaluator(s).
- Option 3: Send multiple keys at one time by inputting multiple evaluator emails OR uploading a .TXT file with evaluator emails.

Click "Next."

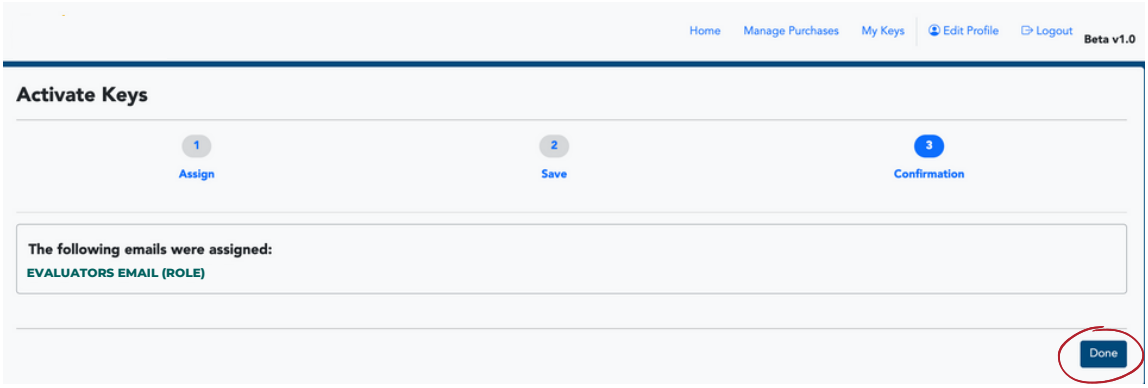
ADD YOUR EVALUATORS:
INDIVIDUAL + 360

3



Select the relationship for each evaluator, then click "Activate."

4



Review your selections, then click "Done."

NOTE

If you uploaded an evaluator's email into the system, they should receive an email such as the one shown to the right.

Dear **EVALUATORS NAME**

You have been recognized as a valued colleague of **NAME** and as such are being invited to provide them with a 360 evaluation through the CELO Index Manager A CELO Index 360 evaluation provides honest feedback that allows a keyholder to uncover unknown strengths and opportunities.

Providing an evaluation is easy, simply click here to accept or decline the invitation. If you accept, please follow the instructions to access the 360 survey. If you decline, **NAME** will receive an email informing them of your decision.

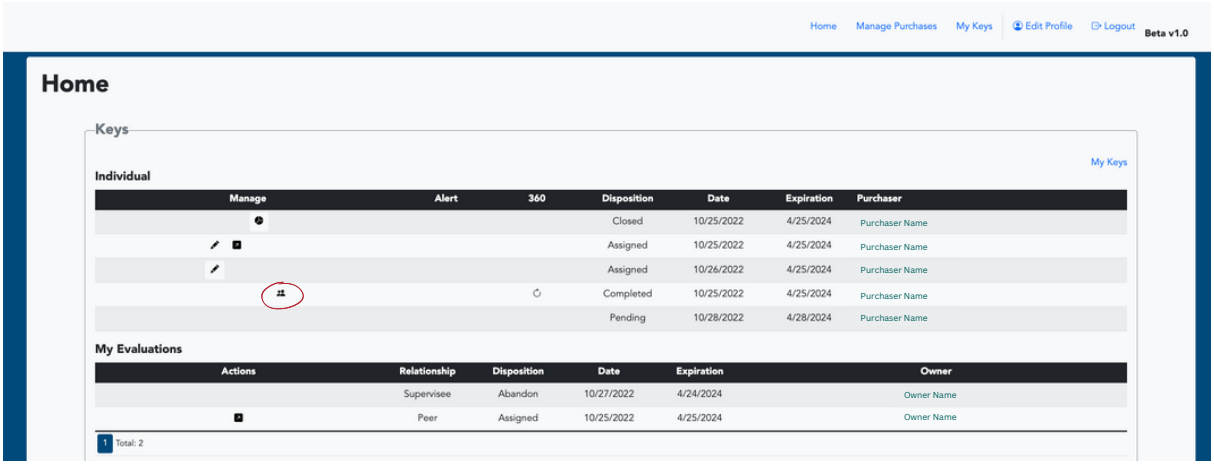
We appreciate your time and thank you in advance for your help with this evaluation.

Sincerely,

The CELO Index Support Team

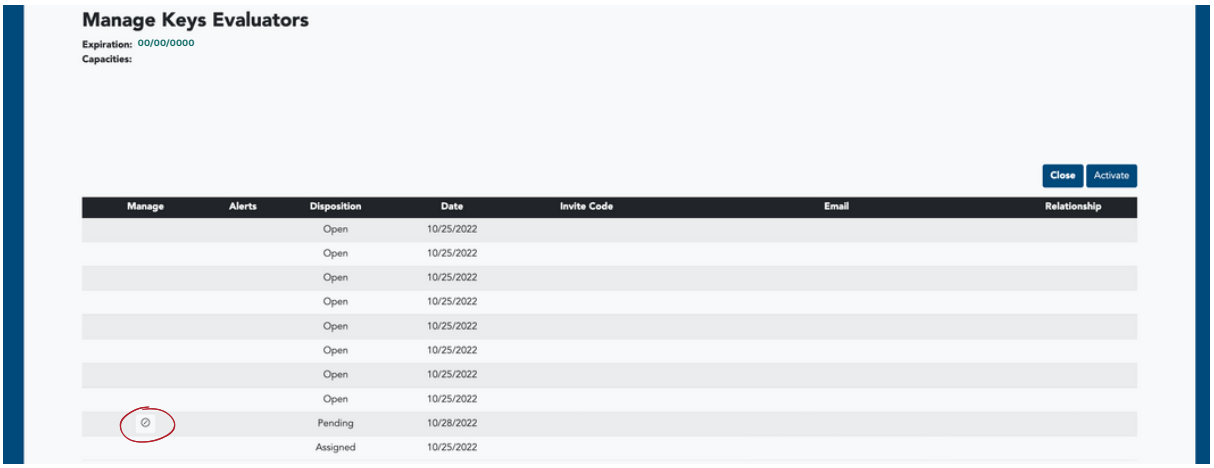
RECLAIM EVALUATOR KEY:
INDIVIDUAL + 360

1



Click the person icon to manage your evaluator(s).

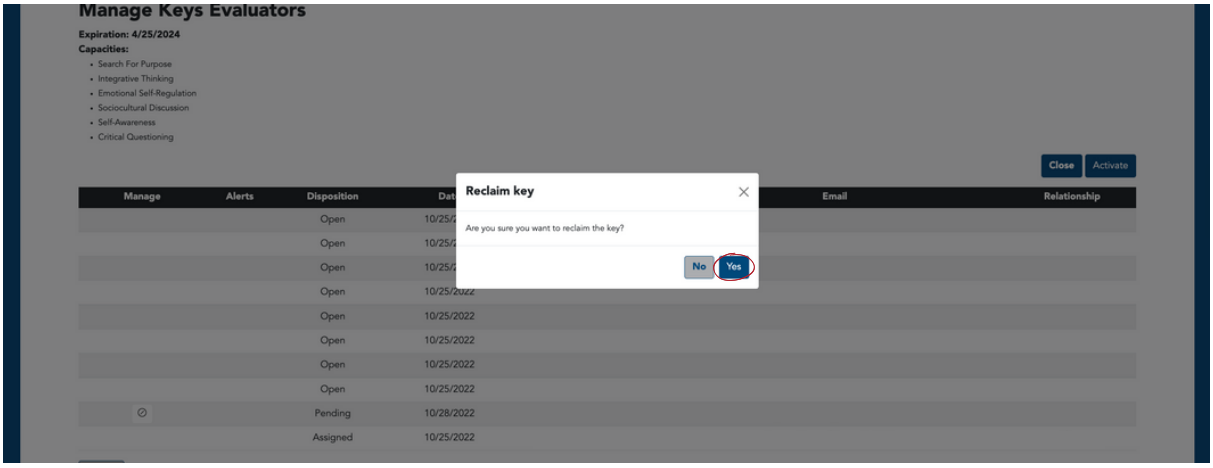
2



Click the circle icon to begin reclaiming your evaluator key.

RECLAIM EVALUATOR KEY:
INDIVIDUAL + 360

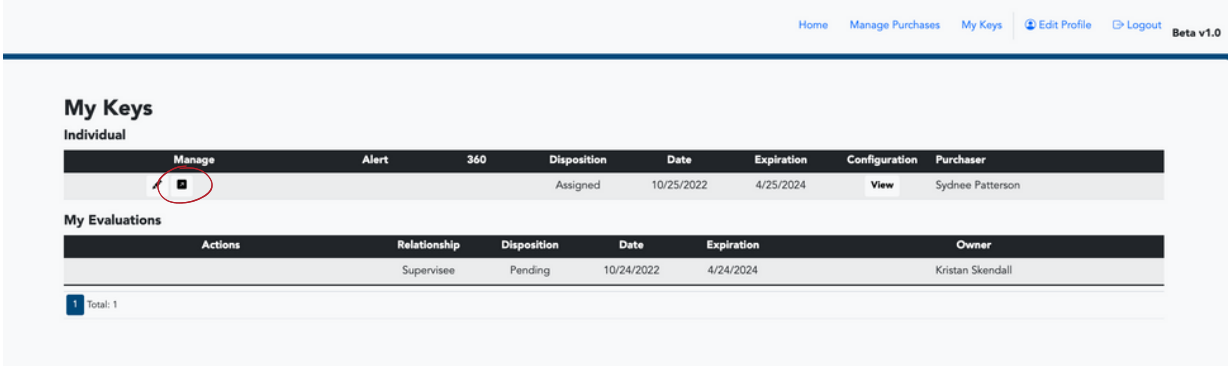
3



Click the "Yes" button to reclaim your evaluator key.

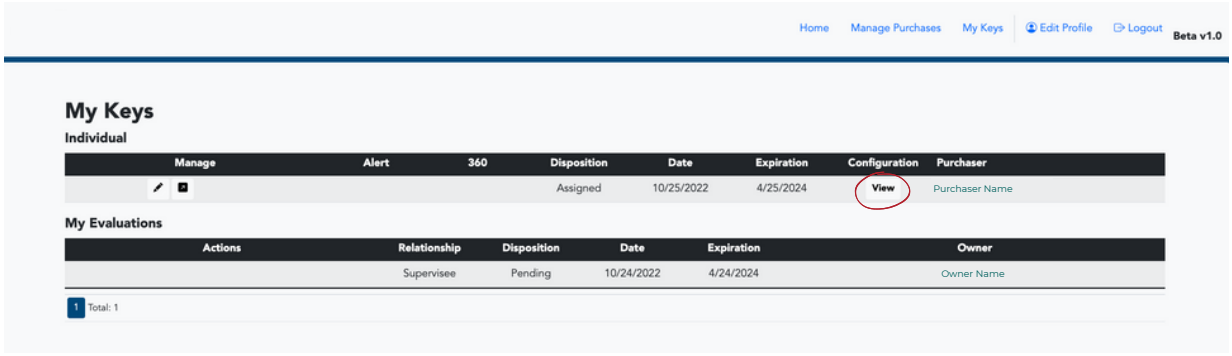
TAKE THE INDEX

1



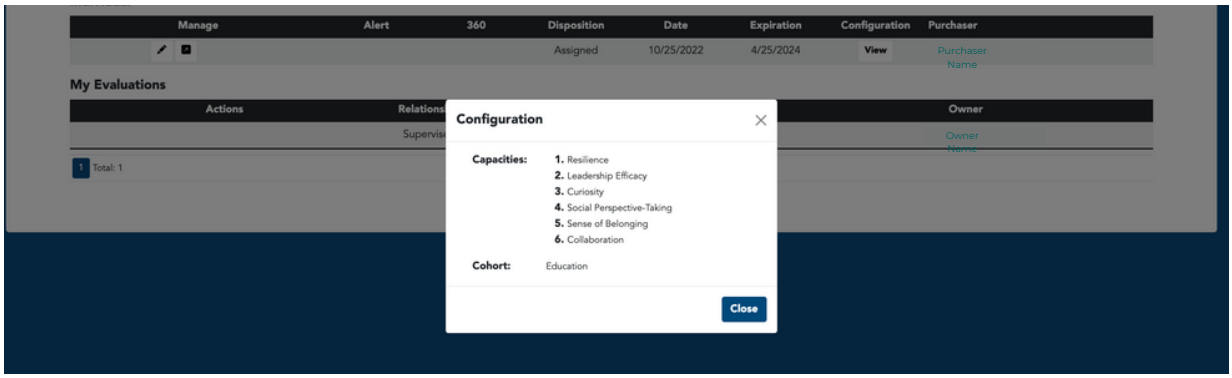
Click the arrow icon to begin your Index.

NOTE



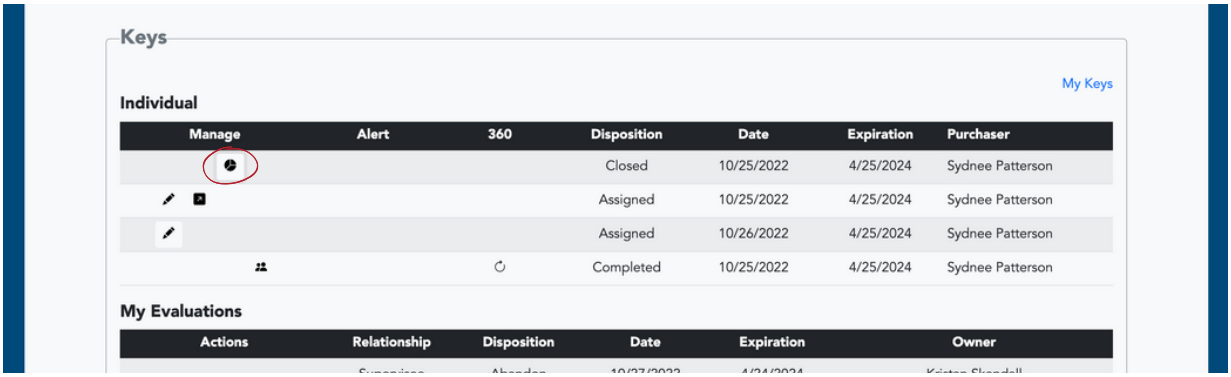
If you would like to review the capacities you (or someone else) chose, click the "View" button.

This will give you a pop-up overviewing the selected capacities and cohort comparison group.



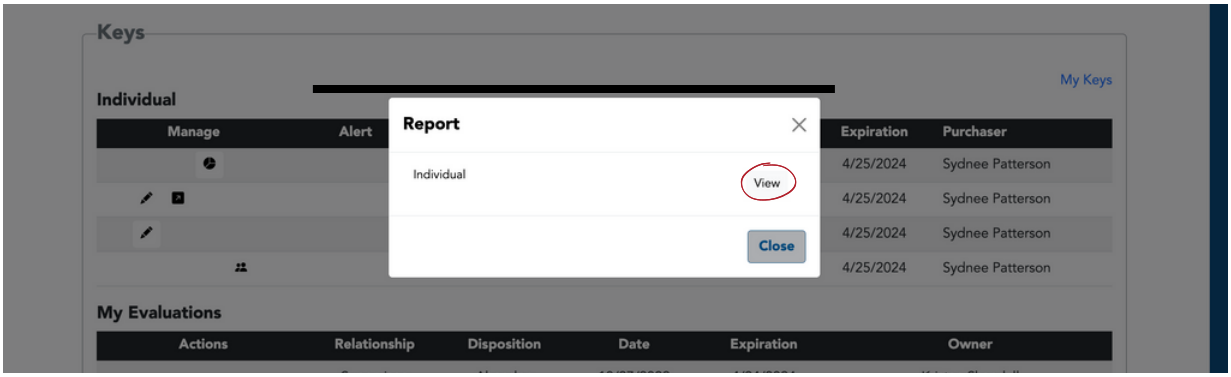
VIEW YOUR INDEX: INDIVIDUAL REPORT

1



Click the pie chart icon to begin the process of viewing your Index report.

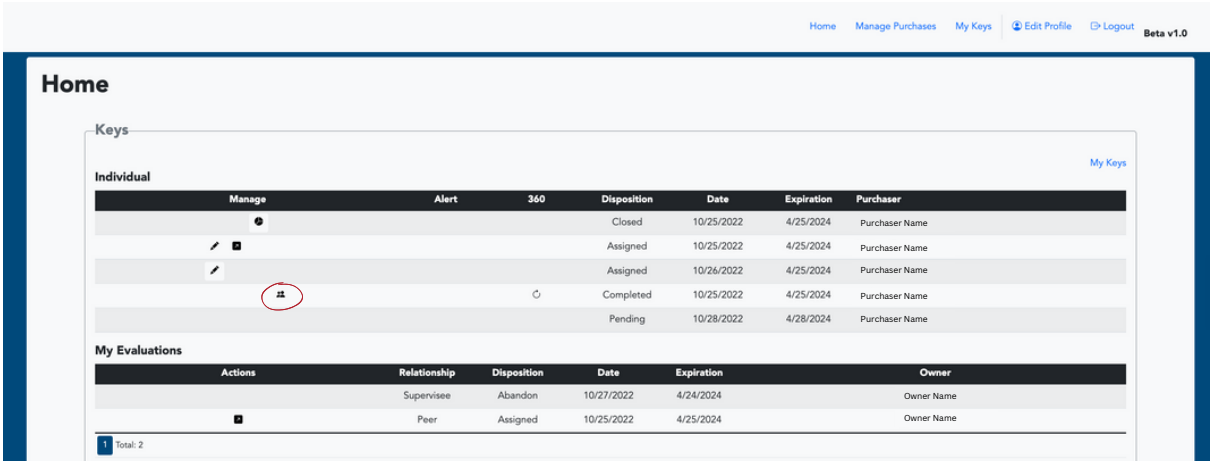
2



Click the "View" button to view your Index report. The report will download as a PDF file.

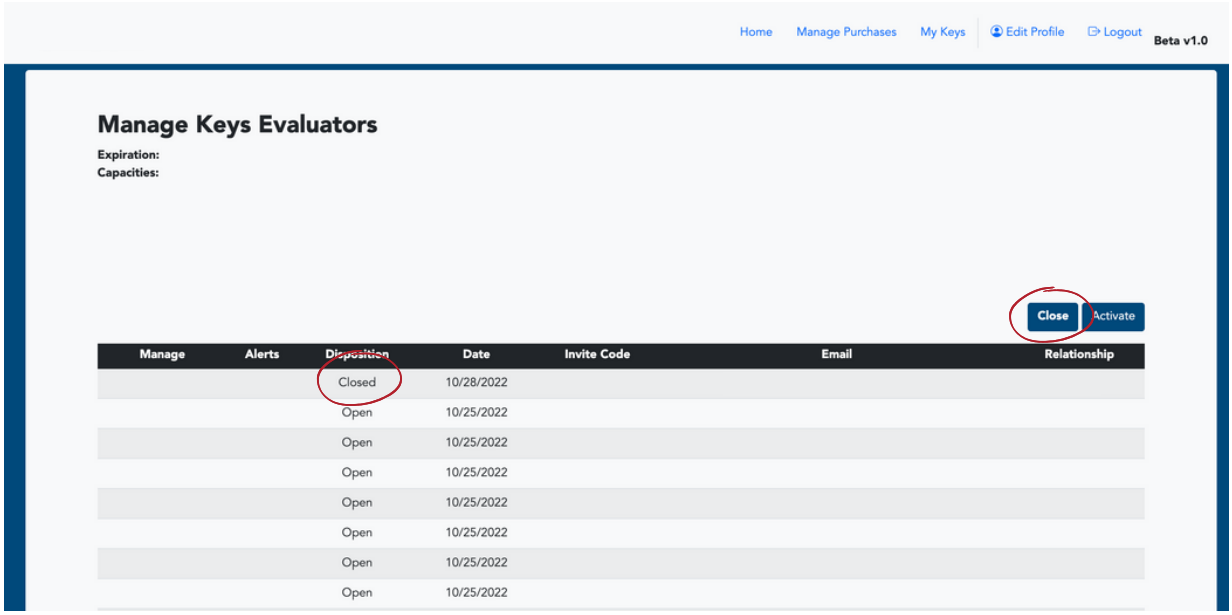
VIEW YOUR INDEX:
INDIVIDUAL + 360 REPORT

1



Click the person icon (the same icon used to manage your evaluator(s).

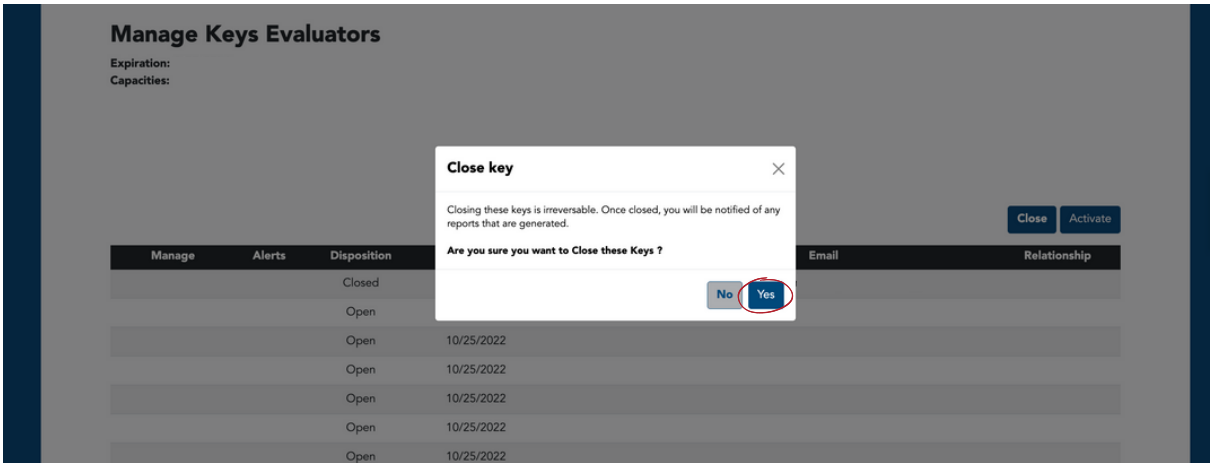
2



Click the "Close" button to close your Index report.

VIEW YOUR INDEX:
INDIVIDUAL + 360 REPORT

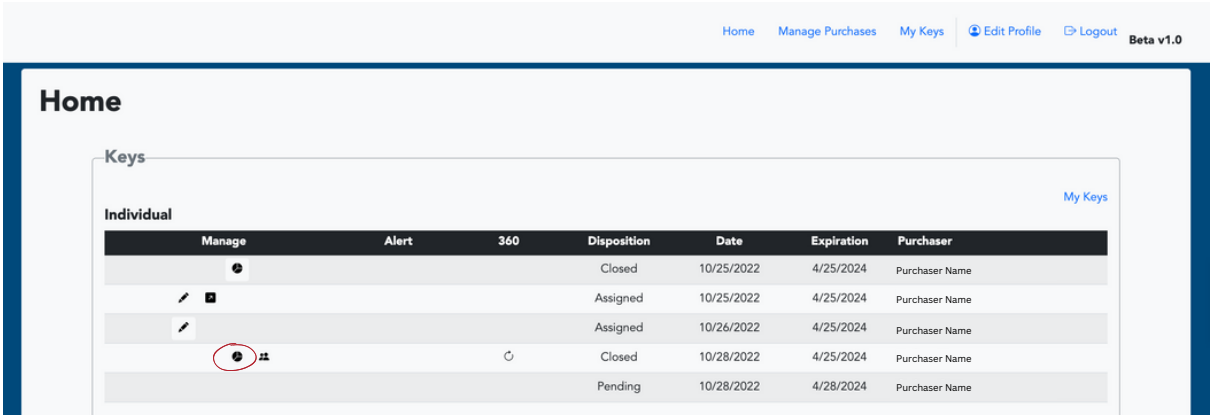
3



Confirm that you would like to close your Index and begin processing your report by clicking "Yes."

After you close your Index, evaluators will no longer be able to submit their responses.

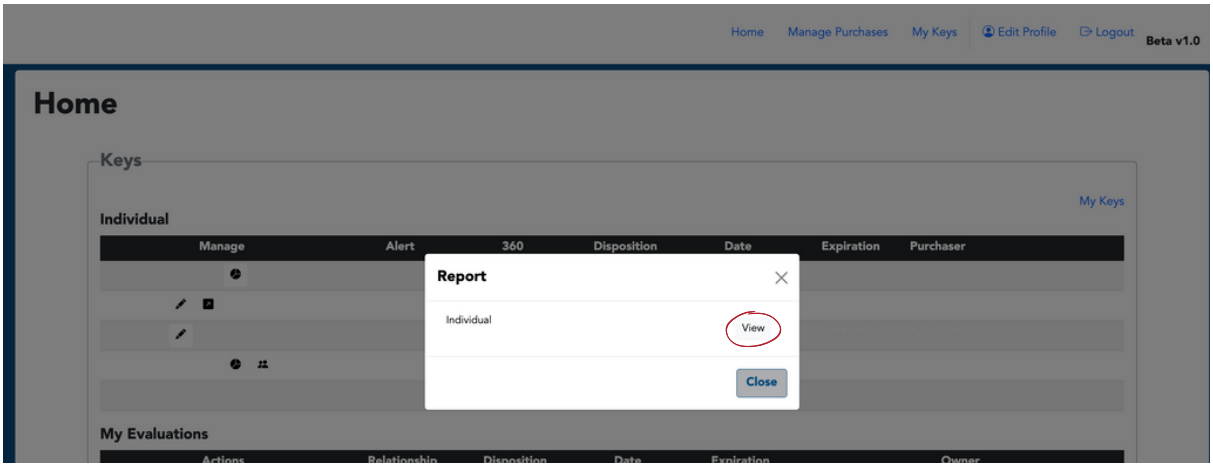
4



Click the pie chart icon to begin the process of viewing your Index report.

VIEW YOUR INDEX:
INDIVIDUAL + 360 REPORT

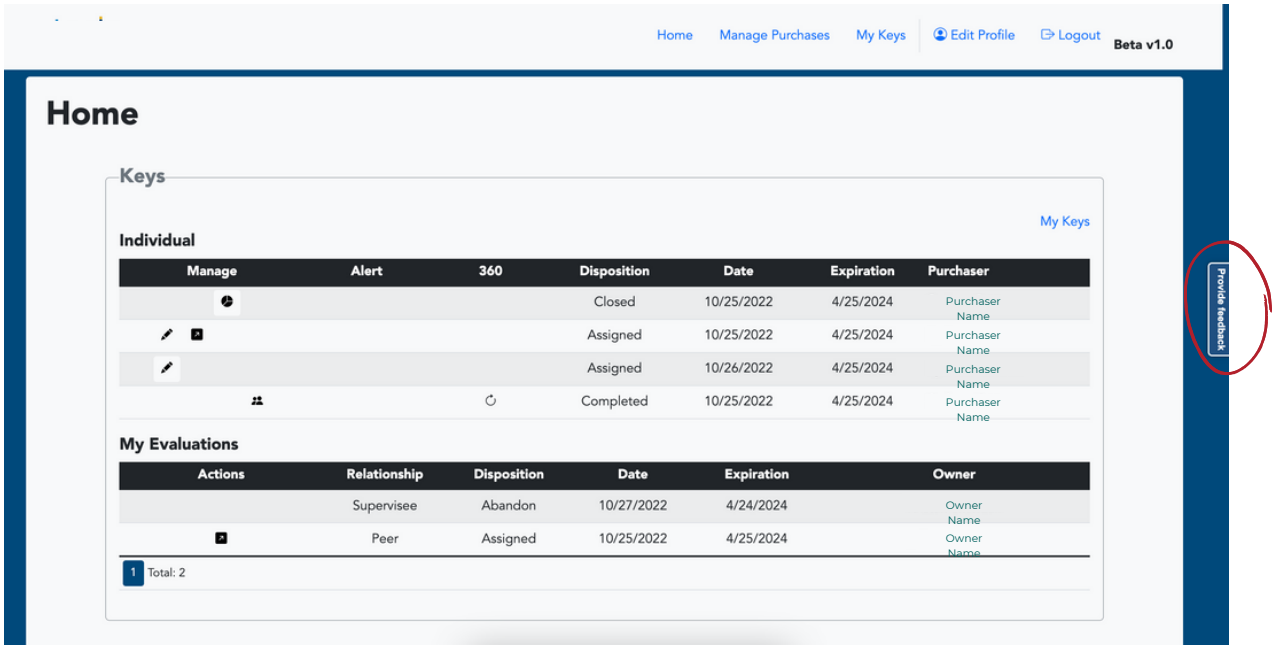
5



Click the "View" button to view your Index report. The report will download as a PDF file.

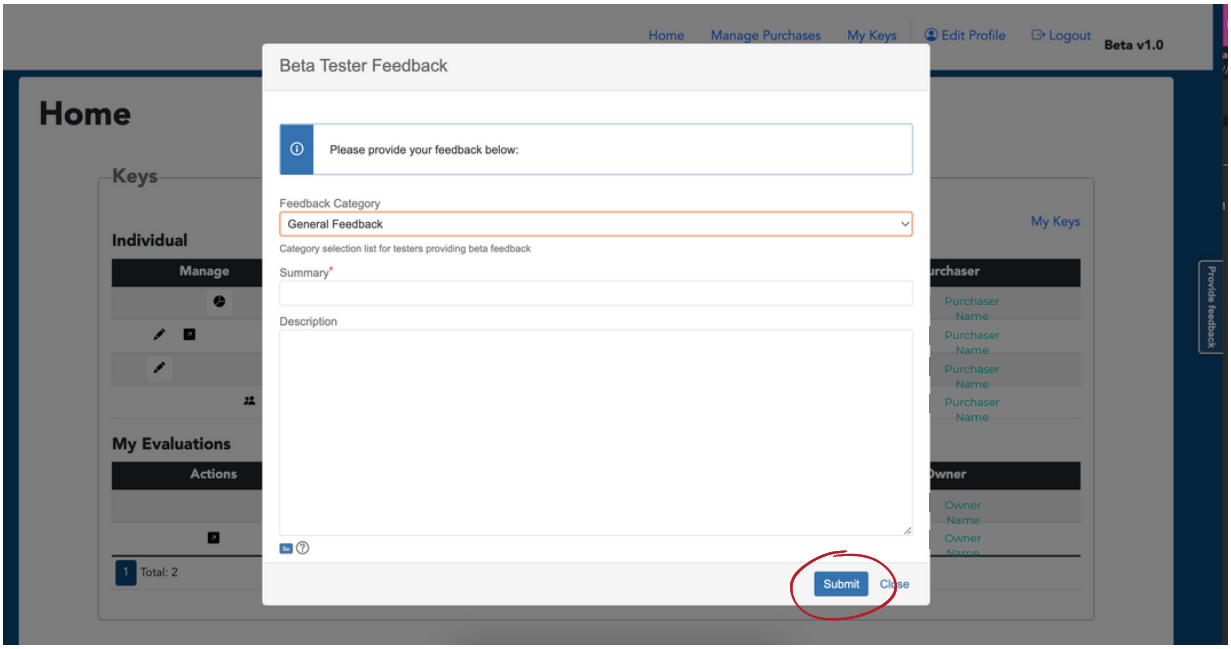
OPTIONAL:
PROVIDE SYSTEM FEEDBACK

1



To provide feedback on the Index, click on the right side tab "Provide Feedback."

2



Select the category for your feedback, provide a short summary, include a description of your feedback, and click "Submit."

CELO
CENTER FOR EXPANDING
LEADERSHIP & OPPORTUNITY