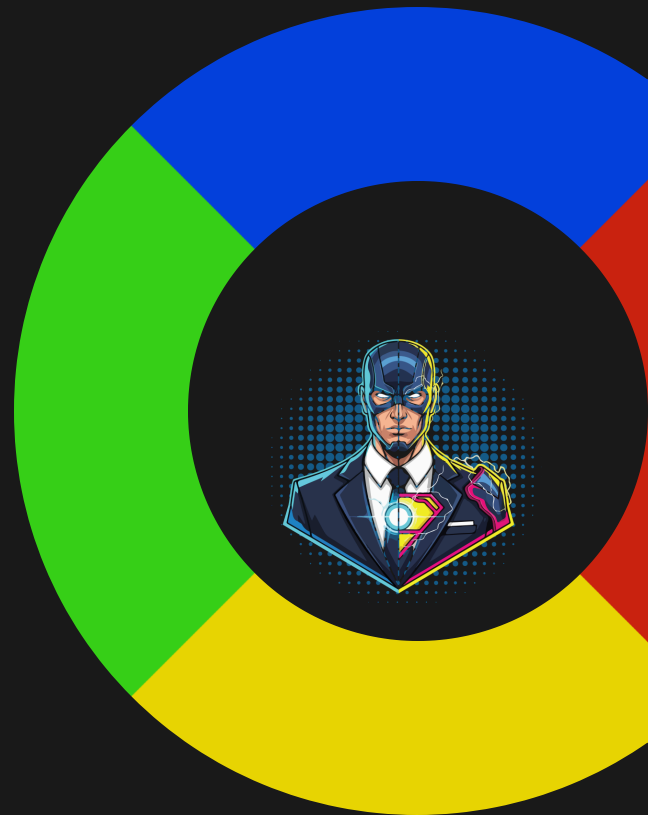




CORPORATE MODE · POLICY

Admin & Governance Manual

Who sees what, what employees agree to, how licences run, and what Corporate Mode is never used for.



These are the rules every Corporate Mode client and every MetaMatch administrator follows. Clients receive this manual with their pilot agreement; the agreement and its data-processing clause take precedence where they differ.

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1 Product status

Everything below is live at quiz.metamatch.ca as of 30 September 2026, except the team-building tools marked planned.

Feature	Status	Notes
Full assessment: 12 work situations + 12 Inner Force items	Live	Opened from each person's MetaMatch home
Employee report: 84 profiles with growth path	Live	Private; reopening it uses no attempt
Employee home: consent, report, history, download, delete	Live	One personal link per person
Team dashboard and KPI overlay	Live	Groups under 5 hidden; KPI file stays in the browser
Licence: seat cap, active-until date, monthly renewal	Live	Every link stops when a licence lapses
Monthly allowance and billable top-ups	Live	Default 2 assessments + 1 Pulse per person per month
Usage report	Live	Seats, completions and top-ups per month
Monthly Pulse, personal roadmap, team Pulse trends	Live	24-question pool, 8 per Pulse, rotating
Wellbeing signposting	Live	Private message with the client's EAP lines
Crew Finder, new-hire fit, project kickoff	Planned	Opt-in consent is already collected

2 Roles and access

Each person sees only what their role needs. Nobody but the employee sees an individual report unless the employee shares it.

Role	Sees	Can do	Never sees
Employee	Own report, Pulse history, roadmap, signposting messages	Take the assessment and Pulses; download or delete own data; opt in or out of project matching	Anyone else's results
Manager	Trends for teams of 5 or more; advisor moves	Read team views	Individual answers, scores or Pulses
Client HR admin	Seat usage, completion counts, team trends, project matching (opted-in people only), settings	Request links and top-ups; set policy options	Individual reports; data of people who did not opt in to matching
MetaMatch admin	Licences, seats, usage, audit log	Create links and dashboard links; grant top-ups; revoke links; support	Individual reports, unless the employee shares one for support

A team view appears only when at least **5 people** in that group have completed. Organization totals count only visible teams, so a hidden team cannot be worked out by subtraction. Team Pulse trends follow the same rule, month by month.

3 Licence and client setup

Each client holds one licence: a number of named seats and an active-until date that moves forward one month at each renewal. When the licence lapses, every link for that client stops at once; renewal turns them back on.

Item	Rule
Seat	One named employee, one personal link, kept for the life of the licence
Seat cap	No link beyond the licensed number; raising the cap needs a licence change
Full assessment	At the start, then a refresh each quarter
Monthly Pulse	1 per month, plus 1 extra on request after a major change
Monthly allowance	2 assessments and 1 Pulse per seat per calendar month (Pacific time), resetting on the 1st
Top-ups	Granted by the MetaMatch admin to one person or a team; logged and billable
Replaced link	Issuing a new link to the same person switches the old one off and uses no new seat
Usage report	Seats used of seats bought, completions this month, top-ups granted

Onboarding a client

1. Sign the pilot agreement and data-processing clause.
2. Agree a client name, seat count, start date and the EAP or support lines employees will see.
3. HR sends a list with email and team columns.
4. MetaMatch creates one link per person and one dashboard link for the HR lead.
5. HR sends each link individually from its own email. Links never go into shared sheets or group emails.
6. The dashboard fills in as teams reach 5 completions.

4 Consent and employee notice

Employees give two separate consents, because Canadian privacy law expects consent for each purpose. Declining the second never limits the first.

Consent	Covers	Default	Can change
Development	Assessment, Pulses, personal roadmap, inclusion in team trends of 5 or more	Asked at first use	Withdraw any time; data deleted on request or self-serve
Project matching	Being suggested by Crew Finder, new-hire fit and kickoff tools	Off	Opt in or out any time from the MetaMatch home

Before their first assessment, every employee sees the one-page notice in Appendix A. It says what is collected, who sees what, how long it is kept, that participation is voluntary, and how to reach MetaMatch. Clients may not make participation a condition of employment, pay or promotion.

5 Feature rules

Assessment. Answer order is shuffled per person, so an answer's position reveals nothing. Team views read each person's latest result; earlier results stay visible to the employee only.

Monthly Pulse. Eight questions about the current month: mode, energy, focus and friction, drawn from a pool of 24 so the set changes every month. Pulses measure state against the person's baseline and never assign a new profile.

Personal roadmap. One practice a month drawn from the person's own profile, tracked through the Pulse. Managers see participation counts at most, never content.

Crew Finder (planned). The HR admin describes a project; the tool suggests people who opted in, with a one-line reason for each, and warns when a crew is missing a force. It shows reasons, not scores. A person makes every final choice.

New-hire fit and project kickoff (planned). Both use the same opt-in pool and the same reasons-not-scores rule. New-hire fit appears only after the new person has completed and consented.

6 Wellbeing signposting

MetaMatch never labels, screens or assesses anyone's health. When a person's Pulses show sustained strain, the only action is a private message to that person pointing to help their employer already provides.

1. **Trigger.** Three consecutive Pulses in pressure mode with low energy.
2. **Message.** A private note: "It might help to talk to someone," with the resources below.
3. **Resources.** Set by each client at onboarding: its employee assistance program (EAP), health benefits line and local crisis lines.
4. **What never happens.** The employer, manager and HR are never notified about an individual. No clinical questions are asked.

An optional MetaMatch coaching add-on may be offered. It is development coaching, is labelled as such, and is never presented as medical or psychological care.

7 Data handling

Topic	Rule
Where it runs	Cloudflare Workers; results in Cloudflare storage under the client's own tenant
Residency	Default global; EU or other residency agreed before signing, never after
Retention	Kept while the licence is active; deleted by the MetaMatch admin 90 days after it ends unless the client asks sooner
Employee deletion	Self-serve from the MetaMatch home, or on request within 30 days; removed from future team views
KPI overlay	The client's KPI file is processed in the browser and never uploaded
Links	Signed, personal and tied to the licence; a leaked link can be replaced, or every link cut off at once
Audit log	Records licences, links issued and replaced, top-ups, revoked seats and employee deletions
Roles in law	The client is the controller of its employees' data; MetaMatch is the processor under the data-processing clause

The 90-day and 30-day periods are proposals for the pilot agreement and are confirmed in each contract.

8 Prohibited uses

Corporate Mode is for team development. Clients agree in the contract that it is **never** used for:

- Hiring, screening or rejecting candidates
- Firing, discipline, performance ratings, pay or promotion decisions
- Medical, psychological or fitness-for-work judgements
- Monitoring or ranking individuals, or reporting on anyone who did not opt in
- Decisions based on protected characteristics such as age, gender, disability or origin

A breach of these terms allows MetaMatch to suspend the licence.

9 Incidents and support

Situation	Response	Who
One link forwarded or leaked	Issue that person a new link; the old one stops working at once	MetaMatch admin
Many links exposed	Revoke all links, then reissue the ones still needed	MetaMatch admin, same day
Employee asks for their data	Download from the MetaMatch home, or a copy within 30 days	Employee / MetaMatch admin
Employee asks for deletion	Delete from the MetaMatch home, or within 30 days on request	Employee / MetaMatch admin
Suspected misuse by a client	Pause the dashboard link, review with the client, suspend if confirmed	Founder
Complaint or question	Answer within 5 business days	MetaMatch, Bond@MetaMatch.us

A Employee privacy notice

Shown to every employee in their MetaMatch home before the first assessment.

Your data, your call

- **Collected:** your answers to the assessment and to short monthly check-ins (the Pulse).
- **Only you** see your report, your Pulse results and your monthly practice.
- **Managers and HR** see team trends only, for groups of 5 people or more. Never your answers or scores.
- **Never used** for hiring, firing, pay, promotion or health decisions.
- **Kept** while your organization's licence is active. You can download or delete it any time from your MetaMatch home.
- **Voluntary.** Taking part is your choice. Questions: Bond@MetaMatch.us.

☐ **I agree** to take part in MetaMatch for my own development, and to be included in team trends of 5 or more people.

☐ **Optional:** MetaMatch may suggest me for project teams my organization is building. Only the reason I fit is shared, never my scores. I can switch this off any time.

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