EPIC: *New User Guide*

Welcome to the world of EPIC! As your authorized provider of Everything DiSC® and The Five Behaviors of a Cohesive Team™, we at Center for Internal Change are excited to support you in using these tools to develop the Leaders, Teams, and Individuals in your organization. With this account you have taken the first step towards initiating a development process that will support continued growth where you need it the most.

First Steps

- Update your account information: Personal Options menu, **View/Edit Account Information**.
- Print a copy of the **Credits Charged for Reports** document under Manage Your Account.
- Take a look at samples of all the reports available to you! Go to the Personal Options menu and choose - **Create Sample Reports**.
- Click on the EPIC logo to find important information on your home page.
- Check out the help documents and videos under the Help menu.

The Process

Now that you've taken a look at some sample reports and kyou now how many credits they cost to create, it's time to purchase credits and start issuing access codes.

Purchasing Credits

Navigate to www.epiccredits.com and click the "add to cart" button. You will need to update the quantity in the shopping cart to the amount you need before checking out.

**Please be aware that credit transfers are not an automatic process. It can take up to two hours before credits are reflected in your account for all orders placed Monday through Friday, 9AM-6PM EST. Contact us directly with any questions or concerns.

Assigning Access Codes

EPIC credits never expire and can be used to generate any of the reports in your account. You can issue a new access code by following these steps:

1. Navigate to **Create New Report/Issue Access Codes** under the Manage Reports drop down menu in your main navigation bar.

2. Choose the Product Family, Product, and Language.
For Example: if I wanted an Everything DiSC Workplace report in Spanish I would choose - "Everything DiSC," "Everything DiSC Workplace," and "Spanish."

3. Decide on Report Options.

Check the report content you wish to include, and decide whether you will enable access for MyEverythingDiSC.com now or later (Everything DiSC products only). Check sample reports to see what the various sections of the report content contain. Click Next.

4. Choose or create a new folder for your reports to reside in.

This makes checking on the status of your reports or generating group reports much easier. Be sure to click Save when creating a new folder.

5. Set up delivery and auto reminder options.

These options can be turned on or off on the View/Edit Account Information page. It is a helpful way to set up your access codes to go out on a later date or to have an automatic reminder sent to participants who don't complete their assessment by a certain time.

6. Add the respondents.

You can enter new respondants one of two ways:

- Under the "Enter Individual" tab you can type in names and email addresses one at a time and click "Add." Be sure to choose whether you want the respondant to automatically receive their results (Veiw Report: Yes or No).

- Using the "Import from Excel" tab, you are able to download an import template to make sending assessments to multiple cadidates easier. Simply follow the instructions in the excel document, save, and upload here. Be sure to choose "0" or "1" for whether or not you would like the respondants to see their results.

7. Assign Access Codes.

A pop-up will tell you how many credits this action will take. Click OK unless any changes need to be made. A new pop-up will appear asking if you would like to include a custom message. Clicking OK will allow you to use a custom subject line and add a message that will appear in the email above the system generated link for the assessment. We recommend always including a custom subject and message to help ensure participants will respond. Create custom messages ahead of time in Personal Options, Manage Custom Messages.

**Now try sending yourself an access code! Once you receive the email, reclaim the code (and your credits) under Manage Your Account - Unassign Access Codes/Reclaim Credits.

Additional Tips and Tricks!

- Always check your EPIC home page for updates and helpful information.

- Go to www.internalchange.com/epic-log-in to sign up for our EPIC newsletter, register for an upcoming EPIC 101, view walkthrough videos, or ask an EPIC related question.

- Sign up for our EPIC newsletter to receive helpful suggestions on using your account, and answers to frequently asked questions we have encountered.

- Attend one of our upcoming EPIC 101 webinars for a live virtual walkthrough.

Call or email us with questions: (847) 259-0005 | support@internalchange.com