

EPIC: New User Guide



Provided by Center for Internal Change

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 and development where you need it most.

First Steps

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

The Process

Now that you've seen some reports and know how many credits will be required to create them, it's time to purchase credits and issue 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 an hour 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

After you receive your credits you will be able to use them to generate any of the reports in your account 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. Click Next.

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 now or later (Everything DiSC products only). Look at sample reports to see what content the various sections of the report contain. Click Next.

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

This option can be turned on or off in the Personal Options menu. 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 respondents one of two ways:

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

Under the "Import from Excel" tab you can download an import template to make sending assessments to multiple candidates 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 respondents to see their results (0 for No, 1 for Yes).

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 links for the following:

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.



Please call or email: (847) 259-0005 • support@internalchange.com