EPIC: Creating Supplemental Reports

Supplemental reports are used to give a little bit more background information into why the personality style was given to a certain individual. Supplemental reports are included in the credit cost per assessment. You may go into EPIC and run a report or supplemental report as many times as needed at no extra cost.

Programs/websites needed: EPIC

If regular profile has NOT been generated:
1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Click "View/Print/Email Completed Reports."
4. In the "Search Criteria" box, search by individual's name. Click SEARCH.
5. A list of all profiles that person has completed will populate. Click SELECT next to the report you want.
6. Under "Report Content," make sure all boxes are checked.
7. Under "Report Selection," mark the circle that says "Both," indicating the generation of both the profile and supplemental report for facilitators.
8. Click NEXT.
9. Generating the report may take a minute or two.
10. Once your reports have been generated, they will show up separately.
11. The page gives you three options per report: View, Save, and Email.
    - View Report: This simply allows you to view the report online.
    - Save Report: This will open the report and save a PDF copy to your hard drive.
    - Email Report: This will give you the option to email the report directly to someone.
12. Use the one that best fits your needs. (Usually either "Save" or "Email.")
13. If you save it to your hard drive, delete all extra letters and numbers at the end of the file.
14. Put report into correct client folder.
15. Also see "Sending DiSC Reports."

If you want ONLY the supplemental report:
1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Click "View/Print/Email Completed Reports."
4. In the "Search Criteria" box, search by individual's name. Click SEARCH.
5. A list of all profiles that person has completed will populate. Click SELECT next to the report you want.
6. Under "Report Content," make sure all boxes are checked.
7. Under "Report Selection," mark the circle that says "Supplemental Report for Facilitators."
8. Click NEXT.

9. Generating the report may take a minute or two.
10. Once your report has been generated, the next page will give you three options: View, Save, and Email.
    - View Report: This simply allows you to view the report online.
    - Save Report: This will open the report and save a PDF copy to your hard drive.
    - Email Report: This will give you the option to email the report directly to someone.
11. Use the one that best fits your needs. (Usually either "Save" or "Email.")
12. If you save it to your hard drive, delete all extra letters and numbers at the end of the file.
13. Put report into correct client folder.
14. Also see "Sending DiSC Reports."