EPIC: Assigning Five Behaviors Personal Development Codes

Five Behaviors Personal Development assesses Trust, Conflict, Commitment, Accountability, and Results on an individual basis rather than a team basis. (For team basis, see Five Behaviors of a Cohesive Team.) Personal Development profiles are 25 EPIC credits each. You cannot run a Team View, Supplemental Report, Facilitator Report, or create a poster for Personal Development.

Programs/websites needed: EPIC

Assigning Codes in EPIC:
1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Click "Create New Report/Issue Access Codes."
4. In the box under Product Family, select "Five Behaviors."
5. In the box under Product, select "Five Behaviors Personal Development."
6. The language box will automatically change to English.
7. Click NEXT.
8. In the box labeled "Report Content," make sure all boxes are checked.
9. Click NEXT.
10. Under "Report Details," select the correct folder or create a new one. (See EPIC: Assigning and Creating Folders and Sub-Folders.)
11. Select also the correct sub-folder or create a new one. If it makes sense to skip the sub-folder, then skip it.
12. Under "Delivery and Auto Reminder Options," set "Deliver Email" to immediately, unless you'd like these to go out on a different day.
13. **If this is a single code for one individual person**, set the reminder to NEVER or set up a date.
14. **If this is for multiple people/company/team**, set the reminder to "If not completed by…" This will open up a new box to the right.
    - This auto reminder can only be used ONCE. Set it for two or three days after the original send date.
15. There are three tabs under "Add Respondents."
    - **Enter Individual:** Use this tab to enter each person individually. This will be used when you receive the list via the body of an email or for individual people. Set the quantity to one. If it's for an individual person, set "View Report" to Yes. If this is for a workshop/company/team, set "View Report" to No.
    - **Import from Excel:** Use this tab if you received the list of names and emails from the template you sent or if they sent an Excel sheet. To import, columns MUST BE in this format: Email→Name→Number. Type in Zero to set "View Report" to No, and type in 1 to set "View Report" to Yes.

- **Use Existing Report:** Use this tab if participants have already taken a DiSC assessment with you. Use the most recent report available.
16. Once finished adding names, click the bottom button, "Assign Access Codes."
17. A pop-up box will appear asking if you'd like to personalize an email. Click "Cancel" to send a system email, and click "OK" to send a personalized email.
18. If you clicked "Cancel," emails will be sent out.
19. If you clicked "OK," you may choose to use the Default Subject or create a Custom Subject.
20. Write your email in the email box provided.
21. Click SEND.