EPIC: Assigning Catalyst Workplace

The DiSC Workplace assessment is 15 EPIC credits, and online access is automatically granted.

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 "Everything DiSC."
5. In the box under Product, select "Catalyst: Everything DiSC."
6. The language box will automatically change to English.
7. Click NEXT.
8. All participants will need to be assigned an organization. Many organizations are already on the platform, but if one does not automatically come up, you can add it. Also, if you have multiple individuals from different organizations, you need to repeat this process multiple times.
9. Select an organization. Click NEXT.
10. Workplace on Catalyst is 15 credits. Adding Agile EQ is an additional 10 credits. (More will be added later.) Workplace is pre-checked. Check all boxes that apply.
11. Click NEXT.
12. Under "Report Details," select the correct folder or create a new one. (See EPIC: Assigning and Creating Folders and Sub-Folders.)
13. Select also the correct sub-folder or create a new one. If it makes sense to skip the sub-folder, then skip it.
14. Under "Delivery and Auto Reminder Options," set "Deliver Email" to immediately, unless you'd like these to go out on a different day.
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. Catalyst reports are set to view online.
    - **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 1 to set "View Report" to Yes.
    - **Use Existing Report:** If the individual has already taken DiSC Workplace, please see" EPIC How To: Assigning Catalyst to Existing Workplace" document.
16. Check the box to confirm individuals from the selected organization.
17. Once finished adding names, click the bottom button, "Assign Access Codes."
18. Click SEND.