# EPIC: Assigning Five Behaviors Team Development Codes

Five Behaviors Team Development assess the functionality of an in-tact team on five different levels: Trust, Conflict, Commitment, Accountability, and Results. Five Behaviors profiles are 35 EPIC credits each.

**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 Powered by DiSC: Individual."
6. The language box will automatically change to English.
7. An orange CAUTION box will appear. As you are creating a whole new team, ignore this box. For editing an already existing team, see "EPIC: Five Behaviors of a Cohesive Team: Editing an Existing Team."
8. Click NEXT.
9. In the box labeled "Report Content," make sure all eight boxes are checked.
10. Click NEXT.
11. Under Report Details, select the correct folder or create a new one. (See EPIC: Assigning and Creating Folders and Sub-Folders.)
12. Select also the correct sub-folder or create a new one. If it makes sense to skip the sub-folder, then skip it.
13. Under Team Name, type in the name of the team doing the assessment, the month, and year. For example, MBooth Executive Team May 2018.
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. **S**et 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.
16. 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 order: Email→Name→Number. The view report option will ***always*** be No.

- **Use Existing Report:** Use this tab if participants have already taken a DiSC assessment with us. This makes the assessment shorter, because it pulls from past assessments. Click the Search button. This will take you to a Search Criteria screen. You can search by name, product family, product, folder, and/or sub-folder. You'll have to do this for each participant. Click NEXT.

17. Once finished adding names, click NEXT at the bottom of the page.
18. A pop-up box will appear to confirm the number of credits being deducted from your account. Click OK.
19. 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. Click OK. (Also see Sending Customized Emails.)
20. Use the email template saved on the hard drive folder "Email Templates." Make sure to change the personized information.
21. Click SEND.