

EPIC: Assigning Five Behaviors Progress Assessments

Five Behaviors Progress reports are for those teams who have already competed a Five Behaviors Team assessment. Progress reports cost zero credits; however, new team members will cost 35 credits each. You may add new team members during the progress report process.

Programs/websites needed: EPIC

Assigning Codes through EPIC:

1. Log into EPIC
2. On the left-hand side, drop down the arrow for "Manage Reports."
3. Select "Create New Report/Issue Access Codes."
4. Under "Product Family," select "Five Behaviors."
5. Under "Product," select "Five Behaviors Team Progress Report (Everything DiSC)"
6. An orange caution will appear at the bottom of the box. If you are only wanting to add an additional member to an existing team, then see EPIC: Editing an Existing 5B Team. If you are wanting to send out progress report access codes to an existing team, proceed to step #7.
7. The language will default to English.
8. Click NEXT
9. Be sure all Report Content boxes are checked.
10. Click NEXT
11. Select or create the appropriate folder/sub-folder.
12. Under "Select your Original Team," click SEARCH.
13. Select the folder/sub-folder of where you stored the original team.
14. Click SEARCH
15. Click the SELECT button to the left-hand side of the original team.
16. Update the team name, if applicable.
17. Scroll down to Add Team members. This will give you a list of all the original team members. If there is a member who is no longer a part of the team, click the X to the left of their name.
18. If you need to add a new team member, you may do so here. Remember new team members will cost 35 credits per member.
19. Once all members have been added, click NEXT.
20. A pop-up box will appear to confirm the number of credits. Click OK.
21. 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.
22. If you chose to a personalized email, the next page will be an email box. Type in your message and click SEND.