General FAQ

Why is it called *Everything DiSC 363® for Leaders*?
Like other profiles that use 360° feedback, *Everything DiSC 363® for Leaders* is filled with data and useful information from the points of view of both the leader and the raters. Unlike other profiles, *Everything DiSC 363 for Leaders* shows leaders what to do with that information by giving **three** strategies for continued leadership development.

Who is *Everything DiSC 363 for Leaders* for? Can it be used with executives?
The profile is designed for leaders at every level, whether they're emerging, high-potential leaders or experienced executives.

What topics does *Everything DiSC 363 for Leaders* cover?
The profile looks at eight approaches to effective leadership as suggested by the DiSC model. These include the Pioneering, Energizing, Affirming, Inclusive, Humble, Deliberate, Resolute, and Commanding Approaches. The leadership assessment asks questions to determine the leader's tendencies in using each of these eight approaches. The profile provides 360° feedback around the eight approaches as well as three strategies to improve their leadership effectiveness.

What is a rater?
A rater is a person who has been assigned to complete an assessment about the leadership skills of another individual. Raters are assigned to one of four rater categories or types – Manager, Direct Report, Peer, or Other.

How many raters do I need per leader?
The profile can include feedback from **up to four** different groups of raters: Manager, Peers, Direct Reports, and Other. However, you do NOT need to have all groups represented. For example, some leaders may only have a Manager and Peers.

In order for any rater group to be shown in the profile, it **must have two or more rater respondents**. This is to ensure confidentiality of individual responses. However, only one respondent is needed for the Manager category; you may include additional managers as needed.

When do I use the "Other" rater group?
The Other rater group is for people who do not fit into Peer, Direct Report, or Manager groups. This could include vendors, former coworkers, or clients. The Other designation can also be used when a leader does not have two or more people in a Peer or Direct Report group and needs to combine groups. In cases like this, EPIC administrators can re-designate raters as Others, creating a group of two and maintaining rater anonymity.

Do I have to use all of the rater groups?
No, you can use whatever combination you like. However, the profile may feel more useful when more rater groups are included.

Are there open-ended responses in the assessment?
No, our research has shown that open-ended responses are more of a distraction that can derail the development process. As an alternative, our assessment includes context-specific comments, which raters can select to provide more detailed feedback. This allows raters to give constructive feedback without distracting leaders from the information.

Everything DiSC 363® for Leaders
FAQ

What is the assessment experience like for the leader and the raters?
The leader is given an online assessment that takes 20-30 minutes to complete. The assessment is in two parts: a DiSC assessment and a Leadership Behavior section about how he or she tends to lead.

Raters are given a two-part assessment that takes 15-20 minutes to complete: the same Leadership Behavior section about the leader and a Leadership Requests section that asks which leadership practices they'd like the leader to do more of. In this second section, raters can also select from context-specific comments to give additional feedback.

What is CommentSmart?
CommentSmart is our exclusive selectable comments feature that allows raters to give focused, balanced, constructive feedback—that the leader can actually use. These comments eliminate the issue of snide, unhelpful comments that can derail the learning process. In addition, CommentSmart saves time by allowing raters to choose from a list of pre-written, highly-tested comments.

What if the leader has already taken an *Everything DiSC* assessment for another *Everything DiSC* program?
If the leader completed an *Everything DiSC* assessment prior to July 21, 2012, s/he will need to complete a new *Everything DiSC* assessment as part of the *363 for Leaders* assessment.

If the leader completed an *Everything DiSC* assessment after July 21, 2012, you can use those scores when assigning *363 for Leaders* for the same person. The **base** *Everything DiSC* assessment data can be pulled into *363 for Leaders*, so the participant **will not need to go through the whole assessment** again. However, the leader will be sent an access code to complete the second part of the *363 for Leaders* assessment process, the Leadership Behavior assessment. Raters will receive an email message with an access code to complete their two-part assessment as well. (See the Advanced Report Options section of the Edit Existing Report function in EPIC.)

Am I charged per rater?
No, the price is the same regardless of the number of raters assigned. You're charged per leader.

How much will the profile cost?
The cost is 50 credits per leader, regardless of the number of raters assigned.

Does the profile identify the DiSC styles of the raters?
No, *Everything DiSC 363 for Leaders* doesn't measure the DiSC styles of the raters.

Is this a validated profile?
Yes. Please see the *Everything DiSC 363 for Leaders* Research Report for more information.

How is this different from *Everything DiSC Management and/or Everything DiSC Work of Leaders*®?
The *Everything DiSC Management Profile* is about day-to-day, one-to-one management relationships. *Work of Leaders* defines leadership as a one-to-many relationship and focuses on increasing effectiveness in the areas of Vision, Alignment, and Execution using 18 behavioral continua based on leadership best practices.
Management and *Work of Leaders* are also based only on a self-assessment. The *Everything DiSC 363 for Leaders* is based on a combination of self-assessment and 360° feedback from colleagues. *Everything DiSC 363 for Leaders* deals with the big picture of leading an organization or group and the way the leader affects the entire group. *Everything DiSC 363 for Leaders* can be used in conjunction with *Everything DiSC Management* or *Everything DiSC Work of Leaders*, or can be used on its own.

EPIC Administration FAQ

For more detailed administrator instructions, log in to your EPIC account and go to EPIC Help, where you can click "*Working with Everything DiSC 363 for Leaders*" in the Table of Contents on the left.

<u>**Seven Most Important Things**</u>

1. In EPIC, it's all about the Leader.
An *Everything DiSC 363 for Leaders* report is organized around the leader. After the initial report is assigned, all searching and managing of leader and rater information is done using the leader's name, not the raters'. Searching by rater name will not yield results. To get started, use *Manage Reports >>Create a New Report*.

Once a report is assigned, you have **150 days** in which to make an unlimited number of changes to leader and rater information. After 150 days, you will no longer be able to make changes.

2. Going back in to add a rater
Once initial access codes have been sent for a leader's report, more raters can be added to the existing report using *Manage Reports >>Edit Existing Report*. Do NOT select *Manage Reports >> Create a New Report* or you will have two separate records that cannot be combined. To add a rater to an existing report, enter search criteria to find the leader associated with the new rater. When the search results are displayed, click on "Edit" to the left of the leader name to go to the leader's report screen. Scroll down to the "Add Rater" box, enter the rater information, and click the "Add Rater" button.

3. Changing rater information
Just like adding a rater, use *Manage Reports >>Edit Existing Report* to change rater information. You can edit, exclude, or permanently delete a rater record using this function. Enter search criteria to find the leader associated with the rater. When the search results are displayed, click on "Edit" to the left of the leader name to go to the leader's report screen. In the "Raters" box, locate the rater whose information you want to change. You will see the options "Delete" and "Edit."

Clicking "Edit" will enable you to change the rater's email address, name, rater type, and "Include" status. Using the Include function, you can control whether a rater's data is included in the report. We recommend using this function as an alternative to deleting a rater from a report. Clicking "Delete" will permanently delete the rater's data.

4. How do I know who has completed their assessments and who hasn't?
You can check the pending status of the leader and raters by using *Manage Reports >>Edit Existing Report*. Enter search criteria to find a leader's report. Locate the leader's name in the search results, and click on "**Report summary**" that appears just below the name. A window will pop up showing you the completion and pending status of the leader and each rater, as well as indicate if the report has met the minimum requirements for report generation.

5. Rater requirements
Raters are assigned to one of four categories based on their relationship with the leader – Manager, Direct Report, Peer, or Other. You don't have to use all of the categories, but each category has a minimum number of participants required to be included in the report. The minimum number of raters required to respond for each rater type is:

Manager	1
Direct Report	2
Peer	2
Other	2

6. Resending access codes as reminders
As a reminder, you can resend access codes to participants using *Manage Reports >>Resend Login Information*. Enter search criteria to find the leader's report. Locate the leader's name in the search results, select it, and click "Next." The resend screen will display the leader and all of the raters for the report, completed and pending. Pending access codes will automatically be checked and can be resent. Access codes that are complete will not be (and cannot be) checked for resend. Click "Resend Login Information" to send a default or custom email message to the leader and/or raters containing their access code.

7. What does this **mean?**
The Report Status icon occurs in the search results of *Manage Reports >>View Completed Reports*, alerting you that a report cannot be generated yet. When you click on the icon, you'll get specific information about why the report cannot be generated at that time and the steps you can take in order to generate it.

<u>**Assigning Access Codes**</u>

What information do I need to create an *Everything DiSC 363® for Leaders* report for someone?
To create a report for a leader, you will need the following information:
- Leader's name, email address, and gender
- Raters' names, email addresses, and rater types (Manager, Direct Report, Peer, or Other)

Be sure to correctly group each leader with the corresponding raters because the leader name that the EPIC administrator assigns is the name that raters see in their email messages and during the assessment process, and it cannot be edited later.

What is a rater?
A rater is a person who has been assigned to complete an assessment about the leadership skills of another individual. Raters are assigned to one of four rater categories or types – Manager, Direct Report, Peer, or Other.

How many raters are required for a leader's *Everything DiSC 363 for Leaders* report?
Raters are assigned to one of four categories – Manager, Direct Report, Peer, or Other. You don't have to use all of the categories, but each category has a minimum number of participants required to be included in the report. The minimum number of raters required to respond for each rater type is:

Manager:	1
Direct Report	2
Peer	2
Other	2

It is recommended that leaders invite more than the minimum requirements. This helps to ensure that enough raters respond, to obtain the most accurate overall data, and to provide greater anonymity for the raters.

How do I assign a profile to a leader and issue access codes?
From the EPIC toolbar:
1. Select *Manage Reports >> Create a New Report*
2. In the Product Family field, select *Everything DiSC*
3. In the Product field, select *Everything DiSC 363 for Leaders*
4. Select the report options you want and click "Next."
5. At the Issue Access Code screen, you will see three boxes: "Report Details" (including Folder and Sub-Folder), "Add Leader," and "Add Rater."
6. Select an existing folder or create a new folder for your *Everything DiSC 363 for Leaders* reports
7. Complete the "Add Leader" and "Add Raters" fields. Only one leader and the associated raters can be entered on this screen. The gender of the leader needs to be entered at this time so the raters see the appropriate gender when responding (e.g. he, she, his, her, etc.) At a minimum, the leader and one rater need to be entered on the Issue Access Code screen before the profile can be assigned.

I'm creating reports for a lot of leaders. Can I assign a report to more than one leader at a time?
No, you can only assign one leader at a time. However, you can assign all of the raters for a single leader at one time. See below.

Can I add all of the raters for a single leader at one time?
Yes, there is an Excel spreadsheet template that can be used to organize and import multiple raters during the Issue Access Code process. The spreadsheet only enables the importing of raters; the leader needs to be entered manually. To access the template:
1. Select *Manage Reports >> Download Import Template* from the EPIC toolbar.
2. Locate *Everything DiSC 363 for Leaders – Rater Template* and indicate language.
3. Click "Download" and save it to a location on your computer.
4. Populate the spreadsheet with the raters' email addresses, names, and rater types, using the number-code format indicated on the spreadsheet.

Then, during the Issue Access Code process:
1. Select "Import" at bottom-left of the Add Rater box.
2. Locate the completed spreadsheet through the browser.
3. Click the "Upload" button.

The list of raters will appear at the bottom of the Add Rater box, at which time you can continue to add raters or go on to the next step in the process.

How do I assign a 363 profile using a leader's scores from another report?
If the leader has already taken the DiSC assessment for another Everything DiSC profile, you can use those scores when assigning a 363 profile for the same person. However, those scores can only be used to complete the DiSC assessment portion of the leader's two-part assessment process. The leader will still need to complete the second assessment on Leadership Behavior. To create a new report with existing Everything DiSC scores:
1. Select *Manage Reports >> Edit Existing Report* in the EPIC toolbar.
2. Enter search criteria that will find the leader's other Everything DiSC report.
3. Click on "Edit" to the left of the leader name.
4. Locate the Advanced Report Options section near the bottom of the Edit Respondent Information screen.
5. Click the drop-down menu to the right of the "Create an Additional Report" button.
6. Select *Everything DiSC 363 for Leaders,* then click the "Create an Additional Report" button.
You will be taken to a new Issue Access Code screen with the Add Leader box already completed for that leader. Proceed by inputting rater information in the Add Rater section.

The leader will receive an email message containing an access code to complete only the Leadership Behavior assessment. Raters will receive an email message with an access code to complete their two-part assessment.

I want my leaders to see their reports right away. Why doesn't this report have a "View Report" option that I can set to "Yes?"
You cannot view a report until raters have completed their access codes. The report is made available to the administrator through the View Completed Reports function.

Am I charged per rater?
No, the price is the same regardless of the number of raters assigned. You're charged per leader.

Am I able to cancel a leader's report and recoup the EPIC credits?
As long as the leader's report is in pending status you can unassign the report, and credits will be returned to your EPIC account. As soon as the leader and one rater have completed their online responses, the report is no longer "pending" and cannot be unassigned. To unassign a leader's report:
1. Select *Manage Reports >> Unassign Access Codes* from the EPIC toolbar.
2. Enter search criteria to find the leader's report and click "Search."
3. Select the leader and click "Next."
4. Select "Send a Confirmation Email" if you want to send an email message about the cancelation of the report to all respondents that are still pending.
5. Click "Unassign Access Codes."

What default message does EPIC send to the leader and rater when I send out the access codes?
EPIC sends different default email messages to the leader and the raters. See below.

Example #1: Default email sent to the Leader:

From: [Administrator Name] [Administrator@emailaddress.com]
Sent: Date and Time
To: Respondent Name
Subject: Your leadership program – Action Requested.

You have been enrolled in an *Everything DiSC® 363 for Leaders™* Program. As part of this process, you will need to respond to an online questionnaire about your leadership style and approaches.

To begin responding to the *Everything DiSC 363 for Leaders* Profile, please click on the link below:

https://www.inscape-epic.com/default.aspx?ac=XXXXXXXXXX

IMPORTANT: This is your personal Access Code. Do not share this note or the Access Code with anyone unless you want them to have access to your Report.

If you are having problems with the link, you can access the profile by entering the site address:

https://www.inscape-epic.com

and supplying the following personalized Access Code:

XXXXXXXXXX

If you have any questions, please contact:

Administrator Company Name

Example #2: Default email sent to the Raters:

From: [Administrator Name] [Administrator@emailaddress.com]

Sent: Date and Time

To: Respondent Name

Subject: Request for your input on [Leader Name]

[Leader Name] has been enrolled in an Everything DiSC® 363 for Leaders™ Program. As part of this process, we are collecting feedback from a number of colleagues. When you click on the link below, you'll be brought to an online questionnaire about [Leader Name]'s leadership.

Your responses to this questionnaire will be combined with all other responses and your individual responses will remain anonymous. However, if you are [Leader Name]'s manager, your responses will be reported separately from other colleagues' responses.

To begin responding, please click on the link below:

https://www.inscape-epic.com/default.aspx?ac=XXXXXXXXXX

IMPORTANT: This is your personal Access Code. Do not share this note or the Access Code with anyone.

If you are having problems with the link, you can access the profile by entering the site address:

https://www.inscape-epic.com

and supplying the following personalized Access Code:

XXXXXXXXXX

If you have any questions, please contact:

Administrator Company Name

Can I send custom email messages to my leaders and raters?
Yes. If you choose to send a custom email when issuing or resending *Everything DiSC 363® for Leaders* access codes, EPIC will display two custom email message boxes: one for the leader and one that will be sent to all of the raters. Each of the custom message boxes has a unique subject line that overrides the default subject line and any custom subject line you have entered on the Personal Options page. The email sent to the raters contains the name of the leader.

Searching

How do I locate leader and rater information that I've already entered in EPIC?
An *Everything DiSC 363 for Leaders* report is organized around the Leader. After the initial report is assigned, all searching and managing of leader and rater information is done using the leader's name, not the raters'. Searching by rater name will not yield results. To get started, use *Manage Reports >>Create a New Report*.

Editing

How do I know who has completed the profile and who hasn't?
You can check the status of the leader and rater responses by using *Manage Reports >> Edit Existing Report* or *>>Edit Existing Reports*.
1. Enter search criteria that will find the leader's report.
2. Locate the leader's name in the search results.
3. Click on "Report Summary" that appears just below the name.

A window will pop up showing you the completion and pending status of the leader and each rater. It will also let you know if the report has met the minimum requirements for report generation.

How many edits can I make to a leader's report?
Once a report is assigned, you have 150 days in which to make an unlimited number of changes to leader and rater information. After 150 days, you will no longer be able to make changes.

What do I do if I misspelled the leader's name or I assigned the wrong leader?
If the leader name assigned by the EPIC administrator is misspelled but recognizable by the raters, the report may still be usable because the name entered by the leader during the assessment process (leader's alternate name) will be the one shown on the final report. If the leader's name entered by the EPIC administrator is incorrect or misleading, the leader's access code must be unassigned, which will also unassign the corresponding rater access codes. Use *Manage Your Account >> Unassign Access Codes* in the EPIC toolbar, after which you can create a new report for the correct leader using *Manage Reports >> Create a New Report* in the EPIC toolbar.

Can I change the leader's email?
Yes, by using *Manage Reports >> Edit Existing Report* in the EPIC toolbar:
1. Enter search criteria that will find the leader's report.
2. Click on "Edit" to the left of the leader name to go to the leader's report screen.
3. Click "Edit" to the far right of the information in the "Leader" box to make changes to the email address.

When the email is changed for a pending report, a new email is sent to the leader with an access code. When the email is changed for a completed report, an email message is not sent.

Can I change the leader's gender?
Yes, as with changing the leader's email, the gender can also be changed using *Manage Reports >> Edit Existing Report*. However, if a rater is responding while you're making the change, the gender will also change at the rater response site. For instance, if you change the leader's gender from male to female during the rater's online response session, they will see a male gender reference for the leader on one set of questions and then a female gender reference on the next set of questions.

Can I go back in to add a rater after the initial report has been created and access codes issued?
Yes, raters can be added both when the report is pending and when it has been completed. From the EPIC toolbar:
1. Select *Manage Reports >> Edit Existing Report*.
2. Enter search criteria that will find the leader's report.
3. Click on "Edit" to the left of the leader name to go to the leader's report screen.
4. Scroll down to the "Add Rater" box.
5. Enter the rater email address, name, and rater type.
6. Click the "Add Rater" button and select email format.

When a rater is added, an email message is sent asking for their input on the leader.

Can I remove a rater from a leader's report?
Yes, raters can be removed from the report at any time. From the EPIC toolbar:
1. Select *Manage Reports >> Edit Existing Report*.
2. Enter search criteria that will find the leader's report.
3. Click on the "Edit" to the left of the leader name to go to the leader's report screen.
4. In the "Raters" box, locate the rater you wish to remove.
5. Click "Delete" to the far right of the rater's information.
6. Click "OK" to confirm that you want the rater deleted.

Raters will not actually be deleted until you click the "Next" button. This allows you to make other edits before leaving the screen. When a rater is removed, no email is sent to the rater.

Can I make changes to the rater's information?
Yes, you can make changes before raters have completed the assessment and after they're done.

Before they've completed the assessment (pending), you can change the rater's email address, name, rater type, and "include" status. If the email address is changed, an email will be sent with the access code link. After the rater has completed the assessment, you can change the name, rater type, and "include" status.

For all changes to rater information:
1. Select *Manage Reports >> Edit Existing Report* from the EPIC toolbar.
2. Enter search criteria that will find the leader's report.
3. Click on "Edit" to the left of the leader name to go to the leader's report screen.
4. In the "Raters" box, locate the rater you wish to remove.
5. Click "Edit" to the far right of the rater's information, and click "OK" to go to the Edit Respondent Information screen.
6. Make your edits, then click "Save Changes."

What does "Include the Rater" mean in the Edit Respondent Information screen?
With the Include function, you can control whether this rater's data is included in the generation of the report. Use this function as an alternative to deleting a rater from a report or changing the rater type to meet a minimum rater requirement. Using the *Include* function gives you flexibility to save the record and use it for future report generations for this leader.

Why would I change the rater type?
One reason may be to correct the type that was mistakenly entered during the assignment process. Additionally, you may find that you want to move a rater into a different category if the original category will not have enough respondents to meet the minimum requirement for being included on the leader's report.

Can I delete a leader from the EPIC system?
Both pending and completed leaders' reports can be deleted from EPIC using *Manage Reports >> Delete Reports* in the EPIC toolbar. If the leader's report is in a pending status, the process deletes the leader and all associated rater records and returns the associated EPIC credits to your account. As soon as the leader and one rater have completed their online responses, the report is no longer in pending status and credits will not be returned to the EPIC account even if there are still pending rater records. The leader and all rater records are deleted.

Will an email be sent to the leader and raters when I delete a report?
As part of the delete process you have an opportunity to send an email to the leader indicating that the report has been deleted. If this option is selected, the leader receives an email indicating that their record and all associated rater records have been deleted. Raters do not receive an email.

Resending/Reminding

How do I send raters a reminder email?
As an EPIC administrator, you can use the Resend function to achieve this purpose while also providing respondents with their access code again. To resend access codes:
1. Select *Manage Reports >> Resend Login Information* from the EPIC toolbar.
2. Enter search criteria that will find the leader's report.
3. Locate the leader's name in the search results, select it, and click "Next."
4. The resend screen will display the leader and all of the raters for the report, completed and pending. Those who have completed will not be (and cannot be) checked for resend.
5. Click "Resend Login Information" to send an email message to the leader and/or raters containing their access code.
6. If you choose to send a custom email, EPIC will display two custom email message boxes: one for the leader and one that will be sent to all of the raters. Complete your email message and click "OK."

Report Generating and Printing

How do I generate a report?
A leader's report will be displayed in the search results of the View/Print/Email function as soon as the leader and one rater have responded. From the EPIC toolbar:
1. Select *Manage Reports >> View/Print/Email Completed Reports*.
2. Enter search criteria that will find the leader's report.
3. Locate the leader's name in the search results and select it.
    - Reports that cannot be generated are noted with a Report Status icon in the first column. Click the icon to see specific reasons that the report cannot be generated.
    - Reports that can be generated are noted with a "Select" link in the first column. Click "Select" and then click "Next" to complete the report generating process.

How do I know when a report is ready to be generated and printed?
When the leader and all raters who were assigned have responded, the EPIC administrator will receive an email message indicating that the report is ready to be generated. (Email notifications are not sent when the leader or individual raters complete their responses.) Or, you can check the status of the leader and raters:
1. Select *Manage Reports >> Edit Existing Report* or *>> View/Print/Email Completed Reports* from the EPIC toolbar.
2. Enter search criteria that will find the leader's report.
3. Locate the leader's name in the search results.
4. Click on "Report Summary" that appears just below the name. A window will pop up showing you the completion and pending status of the leader and each rater.

Can I obtain a report even though all raters have not completed assessments?
Sometimes, even though a leader is displayed in the search results for the View Completed Reports function, his or her report may not be able to be generated if the minimum number of raters for each rater type have not responded. The minimum number of raters required to respond for each rater type is:

Manager	1
Peer	2
Direct Report	2
Other	2

If the report has the minimum requirement for at least one category, it can be generated even if some raters have not responded. However, you may need to edit the report to change rater types or exclude raters if two or more raters in a category have not completed their assessments.

How long does it take to generate the report?
Because there are a number of graphs and visuals in the report, it may take up to a minute to generate.