

How to add Agile EQ or Management profiles to an existing Catalyst access code

So, you have created a Workplace on Catalyst profile for individuals and you now wish to add Agile EQ or Management to their Catalyst account.

If the person has never done an Agile EQ or Management profile, the price for adding these profiles is just 10 credits for each profile.

However, if the person has already taken a traditional Everything DiSC Management or Agile EQ assessment, adding these profiles should be free.

We do not yet have the technology in EPIC for this (as of March 2022) so, when you do this, you will need to create the report, spend the credits and then apply to Wiley to be rebated the credits.

In order to do it this way and apply for a rebate, here is the process you will need to use:

1. In EPIC, go to Manage Reports → Catalyst: Add Applications to access codes → Search for the learners you want to upgrade to Management/AEQ on Catalyst.
2. After selecting the learners, you'll go to the Add Applications Page, where you'll need to select the **checkbox** to add Management/AEQ to these learners' Catalyst accounts
3. Take a **screenshot** of this page, to include learner names and credits that will be charged—see below for example.

Manage Reports ▾ Manage Your Account ▾ Personal Options ▾ Go To ▾ Help ▾

Add Applications ?

Product: Catalyst: Everything DiSC
Language: English

Applications

Workplace on Catalyst
 Management on Catalyst (10 Credits)
 Agile EQ on Catalyst (10 Credits)

Catalyst Access Code List

Listed below are the reports that will be affected. You can edit the list by using the **Add Reports** button, or clicking **X** to remove. Click **Save** to complete your action(s).

| Email | Name | Status | Catalyst: Workplace Enabled | Catalyst: Management Enabled | Catalyst: Agile EQ Enabled |
|--------------|------------|----------|-----------------------------|------------------------------|----------------------------|
| X [redacted] | [redacted] | Pending | Yes | No | No |
| X [redacted] | [redacted] | Complete | Yes | Yes | Yes |
| X [redacted] | [redacted] | Pending | Yes | Yes | Yes |
| X [redacted] | [redacted] | Pending | Yes | Yes | Yes |
| X [redacted] | [redacted] | Pending | Yes | No | Yes |

Total Reports: 5
Total Credits: 30

4. Complete the process of assigning access codes.
5. Then you will need to email Academy of High Achievers with your rebate request. This needs to include: A 'Profile Completion Detail Report' (you will find this in EPIC under 'Manage Your Account') that includes the learner's traditional Management profile and the screenshot you took of the 'Add Applications Page'.
6. We will then apply to Wiley for the rebate and the credits will be added to your EPIC account.
7. Please allow 5 business days for processing.

Julie French