



# Key Configuration and Utilization Decisions in Epic

John Warn

# Learning Objectives

- Epic Premium Fields
- Key Configuration Areas
  - > Transactions
  - > Interface
  - > Policy Types
  - > Activities
  - > Attachment Folders
- Account, User & Workflow Utilization Decisions

# Epic Premium Fields

- > Policy and Line
- > Billed
  - Cannot edit
  - Updated by invoicing if configured
    - including DBCD and ADI
- > Annualized
  - Calculated field
  - Can restrict from editing
  - Invoicing if configured
- > Estimated
  - Can be manually entered
  - Can be updated by download at policy, line or both
  - Invoicing does not effect estimated prem.
- > Downloaded (@ Policy Only)
  - Cannot edit
  - Updated by policy download only

The screenshot shows two forms: 'Premium' and 'Commission'. The 'Premium' form has fields for Annualized (\$9,000.00), Estimated (\$9,001.00), and Estimated monthly, with a 'Downloaded' button and a 'Calculate' button. The 'Commission' form has fields for Annualized (\$1,350.00), Estimated (\$1,350.15), and Estimated monthly, with a 'Calculate' button. A red arrow points to the 'Calculate' button in the Commission form. Below the forms is a table titled 'Policies - All Except Marketed' with a search bar and a 'Find' button. A red arrow points to the search bar. The table has columns for Line, Status, Descr..., Effective, Expira..., Policy Number, B, ICO, Line Estimated Premium, Policy Estimated Pre..., and PF. The table contains four rows of data.

| Line | Status  | Descr... | Effective | Expira... | Policy Number | B | ICO    | Line Estimated Premium | Policy Estimated Pre... | PF |
|------|---------|----------|-----------|-----------|---------------|---|--------|------------------------|-------------------------|----|
| CPKG |         |          | 5/18/2015 | 5/18/2016 | CPP 29804863  |   |        |                        | \$12,852.00             |    |
| PROP | Renewal |          | 5/18/2015 | 5/18/2016 | CPP 29804863  | D | TRACA1 | \$3,851.00             |                         | TF |
| GLIA | Renewal |          | 5/18/2015 | 5/18/2016 | CPP 29804863  | D | TRACA1 | \$9,001.00             |                         | TF |
| PROP | Renewal |          | 3/1/2015  | 3/1/2016  | PR-0012345    | D | TRACA1 |                        | \$38,000.00             | TI |
| WCOM | Renewal |          | 2/27/2015 | 2/27/2016 | WC45782324    | D | 21SCE1 | \$4,506.00             | \$4,506.00              | 2' |

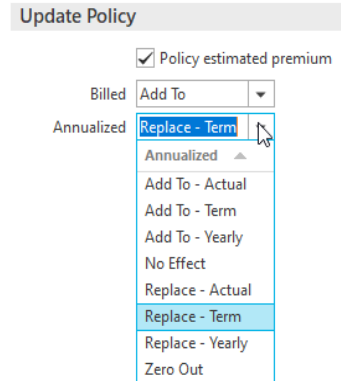
**Decide where and how your premiums and commissions will be entered, updated and reported on.**

**Make sure those fields are visible in everyone's policy list view !**

# Key Configuration Areas – Transactions

## ■ Transaction Code Configuration

- > Can update Billed or Annualized but not Estimated
- > Depending on invoicing @ Policy or Line
- > Policy Estimated checkbox only defaults into transaction, not reverse.
- > Use separate transaction codes for DB and AB.
- > Epic 2020 added additional choices to the Annualized options to more granularly control the way this field is calculated.
- > Applied Epic 2020 General Release Training titled “CALCULATE AND STORE ANNUALIZED PREMIUM FOR MULTI-YEAR AND SHORT-TERM POLICIES”.



The screenshot shows a web form titled "Update Policy". At the top right, there is a checked checkbox labeled "Policy estimated premium". Below this, there are two rows of dropdown menus. The first row is labeled "Billed" and has a dropdown menu currently showing "Add To". The second row is labeled "Annualized" and has a dropdown menu that is open, showing several options: "Annualized", "Add To - Actual", "Add To - Term", "Add To - Yearly", "No Effect", "Replace - Actual", "Replace - Term", "Replace - Yearly", and "Zero Out". The "Replace - Term" option is highlighted in blue. A mouse cursor is visible over the "Replace - Term" option.

# Key Configuration Areas - Interface

- Interface configuration
  - > Policy Download
    - Updates Downloaded Premium @ Policy, Line or Both
    - Update Premium @ Estimated, Annualized or Both
    - Option for Annualized Calculation
  - > Direct Bill & ADI
    - Can Update Premium/Commission
    - Transaction can be added to the Policy or Line
    - Updates based on transaction code configuration

These options are set for each download partner but may be copied from one to another.

# Key Configuration Areas - Interface

## ■ Policy Download

Download Options | **Status Codes** | NAIC | Contract Numbers | Producer Subcodes | Direct Bill | Automated Download Invoicing | Claims | eDocs & Messages

**Default Who/Owner** | **Premium Settings**

Employee    Work group

Type of business    Personal    Commercial

Level affected    Policy    Line    Both

Update premium    Estimated    Annualized    Both

Annualized calculation type    Term    Actual    Yearly

WARJO1   **John Warn**

(This will default if the who/owner code setup for the activity code is unavailable.)

**Status Codes**

| Status | Status Description           | Policy Status | Update Policy Status | Update Premium(s) | Policy Download / |
|--------|------------------------------|---------------|----------------------|-------------------|-------------------|
| NBQ    | New Business Quote           |               | No                   | No                |                   |
| NBS    | New Business                 | NEW           | No                   | Yes               | NBS6              |
| NRA    | Non-Renewal (sent to Agency) | NRN           | Yes                  | No                | NRN6              |
| PAB    | Premium Audits               | REN           | No                   | Yes               | AUD6              |
| PCH    | Policy Change                | REN           | No                   | Yes               | END6              |
| REI    | Reinstatement                | REN           | Yes                  | No                | REI6              |
| REW    | Rewrite                      | REW           | No                   | Yes               | REW6              |
| RIX    | Re-Issue                     | REW           | No                   | Yes               | REW6              |
| RNR    | Reversal of Non-Renewal      | REN           | Yes                  | No                | REI6              |
| RWL    | Renewal/Renewal Image        | REN           | Yes                  | Yes               | REN6              |
| NAIC   | Renewal Quote                | NAIC          | No                   | No                |                   |

# Key Configuration Areas - Interface

## ■ Direct Bill Commission Download

Download Options | Status Codes | NAIC | Contract Numbers | Producer Subcodes | **Direct Bill** | Automated Download Invoicing | Claims | eDocs & Messages

### Direct Bill Commission Download

**Direct Bill Commissions**

- Receive direct bill commission download
- Update premium/commission

**Transactions**

Add to  Policy  Line

- File items as reconciled
- Finalize statements

### Direct Bill Transaction Codes

| + | ACORD Code | ACORD Description ▲         | Transaction Code | Transaction Description                                     |
|---|------------|-----------------------------|------------------|-------------------------------------------------------------|
|   | APR        | Appraisal                   | DBO6             | DB Other -Comm Download -&PPECode& &PolType& &TransEffDate& |
|   | PAD        | Audit                       | DBA6             | DB Aud -Comm Download -&PPECode& &PolType& &TransEffDate&   |
|   | BND        | Binder                      | DBO6             | DB Other -Comm Download -&PPECode& &PolType& &TransEffDate& |
|   | XLN        | Cancellation                | DBC6             | DB Canc -Comm Download -&PPECode& &PolType& &TransEffDate&  |
|   | XLC        | Cancellation Confirmation   | DBC6             | DB Canc -Comm Download -&PPECode& &PolType& &TransEffDate&  |
|   | ADJ        | Commission Adjustment       | DBO6             | DB Other -Comm Download -&PPECode& &PolType& &TransEffDate& |
|   | CAD        | Countersignature Adjustment | DBO6             | DB Other -Comm Download -&PPECode& &PolType& &TransEffDate& |
|   | PCH        | Endorsement                 | DBE6             | DB End -Comm Download -&PPECode& &PolType& &TransEffDate&   |
|   | ISP        | Inspection                  | DBO6             | DB Other -Comm Download -&PPECode& &PolType& &TransEffDate& |
|   | INS        | Installation                | DBI6             | DB Inst -Comm Download -&PPECode& &PolType& &TransEffDate&  |



## Configuration Cont.

- Policy Types
- Activities & Events
- Attachments
- User Defaults



# Account, User & Workflow Utilization Decisions

- Naming Conventions
- Association – Access
- List Views (Columns & Filters)

# Utilities

- Commission/Premium Calculations
  - > Utility to roll up the Line premium and commissions into the policy fields
  - > Sums the estimated line prem. & comm. and populates the policy level estimated fields.
- Move Attachments
  - > Use to reduce or simplify Attachment Folders
  - > The Move Attachments utility enables you to move attachments in bulk to another folder that meet the selected criteria

# Summary

- Before making any key configuration changes, consider the following:
  - > If there is a compelling reason to change key configuration. Consider the following prior to implementation:
    - > Discuss changes and implication with Applied Support
    - > Engage with the Applied Community & Applied Client Network Forums
    - > Test changed in a Demo or Test environment
    - > Assess security implications
    - > Communicate and solicit feedback from all stakeholders
    - > Document the decision and configuration changes
    - > Assess the impact of workflows and rewrite when necessary
    - > Inactivate old codes

# Additional Resources

- Other Applied.Net 2020 Sessions
  - > “Applied Epic Tips & Techniques Part 2: Administration”
  - > “Expert Panel: Optimizing Applied Epic”
  - > “Get the Book of Business Report You Need in Applied Epic”
- Epic Help (F1)
  - > “Premium Fields: Definitions and Calculations”
  - > “Commission/Premium Calculations Configuration”
- Applied Client Network Webinars
  - > “Configuring Applied Epic for Consistency and Efficiency for Your Servicing Staff”
  - > “Managing Configuration in Applied Epic – Operations”
- Applied Community Epic Product Webinars
  - > “Premium Fields”



# Thank you!

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