APPLIED | NET 2020
THE DIGITAL PATH FORWARD

APPLIED
CLIENT NETWORK

Key Configuration and Utilization Decisions in Applied Epic

SESSION HANDOUT

Prepared for Applied Client Network and Applied Systems

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X	Operations		Other:
	Principal/Owner		

Table of Contents

Preface 6
Premium & Commission Fields 6
Policy vs. Line level: 7
Billed vs. Estimated vs. Annualized: 8
Configuration: 9
Sample Agency Premium & Commission Planning 10
Activities & Attachments in Epic 12
Account Level Functionality 12
Activity Categories 12
Reporting 17
Configuration 18
User Options - Field Defaults 18
Attachment Folders 19
Activities 19
Events 21
Utilities 23
Agency Culture 23
Activities & Attachments – Decision Making 24
Appendix 24

Seminar Type: Management

Seminar Level: Basic: An introductory level course is basic in nature and addresses fundamental concepts. We expect attendees to have a basic level of insurance knowledge, have been oriented to an agency or brokerages' processes.

Class Description: In order to realize the full power of Epic, it is necessary for the agency to understand how the account level features and functions, configuration choices, reporting, and workflow "philosophy" choices will all interact. This class will focus on attempting to "connect the dots" on some of these areas in order to help attendees make decisions that will improve efficiencies and reduce frustration.

Learning Outcomes:

- Recognize the importance of establishing overarching "philosophies" on how workflows will be approached in the Epic system.
- Realize how choices in different configuration areas can either have a synergistic or productivity draining impact on each other.
- Understand that account level functionality must be understood and factored into configuration decision making.

Assumptions: This seminar is based on the following
Applied Epic® Agency Management System

Preface

This sessions is not intended to instruct anyone on how to configure Epic. It is intended to show what can be configured in order to help each agency or brokerage make configuration decisions that are best for them.

Configuration settings have a large impact on how Epic is used by all employees. You should not flip flop on key configuration decisions since they will impact workflows, training and reporting and auditing. Stick with your decisions and make it work.

If there is a compelling reason to change key configuration. Consider the following prior to implementation:

1. Discuss changes and implication with Applied Support
2. Engage with the Applied Community or Applied Client Network Forums
3. Test changed in a Demo or Test environment
4. Assess security implications
5. Communicate and solicit feedback from all stakeholders
6. Document the decision and configuration changes
7. Access the impact of workflows and rewrite when necessary
8. Inactivate old codes

Premium & Commission Fields

Epic has Premium & Commission fields for Billed, Estimated and Annualized (we'll ignore Download for now) at both the Policy and the Line level. The Estimated and Annualized fields can be manually entered or updated at the Policy/Line level. So for a commercial package policy with 3 lines of coverage (Property, GL & Commercial Auto for example), the user would be confronted with a total of 16 premium and commission fields. For this reason, making some decisions on what needs to be done and how it will get done in this area is crucial.

There is an entire class dedicated only to the topic of Epic Premium & Commission fields; it's a big topic with lots of moving parts, and it would be a very good idea to spend a few hours learning about it. For today, we'll need to boil this down to the main points.

*** See Epic Help "Premium Fields: Definitions and Calculations" for more explanation in this area.

The short and simple summary

If you don't make it through all the issues to decide on what is best for your agency, here's what you need to know:

- **Estimated** premium and commission fields are easier. Easier to configure, easier to maintain, easier to report on. So, if you are not certain, consider focusing your workflows and reporting on the Estimated fields

- Line Level is better than Policy level…. However,
  Invoice entry defaults make Policy Level easier. So if you really don't read past this, just go with **Policy level**

Policy vs. Line level:

- Epic reporting is better when entry is done at the line level
- Line level is a lot more work for the users; especially if you are doing agency bill invoicing since the transaction entry should follow
- Transaction Entry always defaults to "Policy", not Line. This creates enough problems for many agencies that the final decision is just to do all agency bill invoicing at the policy level regardless. Epic 2019 did add the ability to set DB Record Reconciliations to the line level.
- The "Commission / Premium Calculations" option in Configure→Policy should almost certainly be turned on to run daily or after download.
- Populate your line level Estimated Commission fields based on the Commission percentage and Estimated Premium entries. Nice for updating the estimated commission after a Policy download comes through that only updates the premium field
- Sum up your Line level premium and commission fields and put that total into the Estimated fields at the Policy level
- You can setup a PCKG or BOPP policy type to be added as a line to invoice at the line level.

There are agencies that have decided to enter at the Line level, but to only use one of the lines of a package and to enter what would have been the policy level numbers on that one line. So basically, they are reducing the amount of data entry by working only the 4 fields just like a policy level agency would, but they are doing the entry at the line level in order to gain all the benefits of entry at the Line level, then getting the policy level estimated fields for free.

Billed vs. Estimated vs. Annualized:

A quick look at how these fields differ from each other:

- Annualized: Annualized should be the most advanced and useful of the 3, but not every calculation performed on a transaction to update it goes exactly the way we would want. Direct Bill Commission download in particular has been reported by many agencies as updating these fields in ways that are less than ideal. *Note: by "less than ideal" I mean pretty much unusable without far more effort than most agencies will want to expend*
    - Can be manually updated (You can also set security so that users cannot manually update)
    - Can be updated via transaction entry if configured to do so by the agency on a per transaction code basis
      Some transactions (like endorsements) will have that update run through an annualization calculation before being applied
    - Can be updated via policy download if configured to do so by the agency on a per company basis
- Billed: Billed is easy since it can't be touched directly at the account level. All we need to decide is if we are going to configure our transactions to have Billed show total cost or just pure premium. Get your transaction codes configured properly right away and then enjoy the benefits of having such a useful field on the Policy / Line level
    - Cannot be manually updated.
    - Can be updated via transaction entry if configured to do so by the agency on a per transaction code basis.
      No calculations are applied to the billed amounts to affect how the transaction will update the Billed fields
- Estimated: Epic is built in such a way that it is the easiest to use and manage of the premium and commission fields we have
    - Can be manually updated
    - Cannot be updated via transaction entry
    - ("the" choice to place what the anticipated/projected/estimated Premium/Commission amounts will be for that policy period) might help the newer users
    - Can be updated via policy download if configured to do so by the agency on a per company basis
    - Action→Renew policies have the Annualized premium and commission from the policy/line being copied forward entered in as the starting Estimated amounts
    - There are potentially important reports, like Verify Transaction Commission – Compare to Policy" that ONLY work with the Estimated amounts

***** Whatever choice you make in your agency or brokerage, make sure that all employees have corresponding premium fields visible in their policy list views.**

Line	Status Desc...	Effective	Expir...	Policy Number	B.	ICO	Line Estimated Premium	Policy Estimated Pre...
CPKG		6/1/2009	6/1/2010	CPP 28489135				$3,823.00
BAUT	New Policy	6/1/2009	6/1/2010	CPP 28489135	D	GRAMU1	$1,671.00	
GLIA	New Policy	6/1/2009	6/1/2010	CPP 28489135	D	GRAMU1	$2,152.00	

Configuration:

Transaction Codes

Transaction codes can be set to update the Billed & Annualized fields automatically when a transaction is entered on a per transaction code basis.

- Estimated fields are not touched by transaction entry
- Transaction entry level matters. If you enter transactions at the policy level, the Line fields will not be updated, and the transactions will not "absorb" line level fields like Status which you might find painful on transaction based reports
- For direct bill commission download or import create separate codes so that those transactions can be configured to not update the annualized fields.

Commission/Premium Calculations

This is a utility that can be setup to run automatically either after download or at a set time each day. It will calculate the Estimated commissions and premiums on all lines of business and then sum them up into the Policy level Estimated Premium & Commission fields.

*** Review Epic Help file "Commission/Premium Calculations Configuration " for more details.

Policy Download

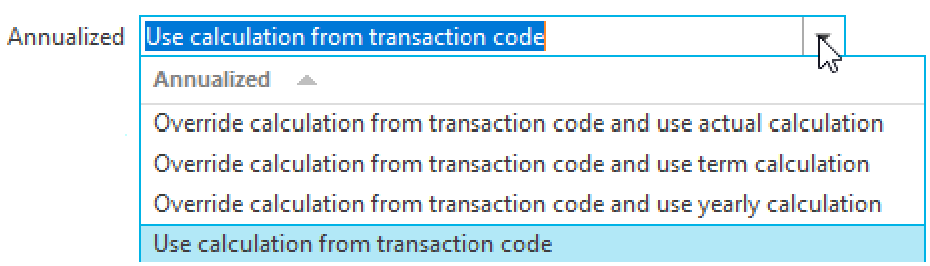
Policy Download can be set to update the Annualized and Estimated at either the Policy or Line level, or both

Direct Bill Commission Download

Direct bill commission download relies on the configuration of the Transaction code(s) used. The Add to Policy vs. Line will determine which level the transaction will be associated with.

Policy Types

Epic 2020 added some additional configuration choices for Annualized premiums and how they are calculated. There is now an Annualized setting allowing for more granular settings by policy type. By default, this setting effect the annualized field based on the transaction code configuration. It can be overridden for specific policy types used for short term or long term policies.



Sample Agency Premium & Commission Planning

Intent

Sample Agency's intent is to use the Annualized premium and commission fields in Epic as primary for reporting purposes. A secondary goal is to be able to utilize the Commission Tracking &/or Commission Variance reports based on the Estimated premium and commission fields.

To achieve this goal, there are 5 procedure or configuration areas that we believe must be addressed. The purpose of this document is to summarize how each of those areas will be utilized &/or configured.

User Input

Customer Service is responsible for the entry of premium and commission information on all new and renewal business.

- Policy level only
- Annualized Premium & Commission
- Estimated Premium & Commission

Policy Download

- Policy download will be set to update both the annualized and estimated premium at both the policy and line level.
  Note that at Sample Agency, we do not care about the line level premiums – but having the download update the line level fields is not harmful for the annualized numbers and is of minor benefit for the estimated numbers (due to the Commission/Premium Calculations configure option below).

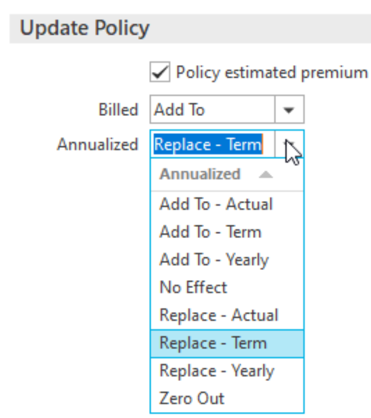
Direct Bill Commission Download

- Direct bill commission download is setup to allow the updating of premium & commission information.
- Like it or not, direct bill transactions - from download or from manual entry - update the Billed & Annualized premiums based on how the Transaction Codes are configured in the system.
- Direct bill commission download setup will be configured to add transactions to the Policy level

Transaction Configuration

Since users will be updating the Annualized premium & commission as part of normal new and renewal processing, there is no benefit to allowing related transactions to update the Policy/Line Annualized numbers.
(NOTE: This sample is from an agency that wanted annualized to be manually updated at least once for each policy term. This is not the norm. For most agencies, it is recommended that transactions like NEWB, REIN, RENB & REWR be setup for only agency bill with Annualized = Replace. Then new codes for their direct bill equivalents be created with Annualized = No effect)

- All transactions associated with new business, renewals, rewrites or reissues will be set to have the following effects on the premium and commission fields:
  [NEWB, REIN, RENB, REWR, INST]
    - Billed = Add to
    - Annualized = No effect
- Endorsement transactions will be will be set to have the following effects on the premium and commission fields:
  [ENDT]
    - Billed = Add to
    - Annualized = Add to
- Cancellation transactions will be set to have the following effects:
  [CANC]
    - Billed = Add to
    - Annualized = No effect
- Audit transactions will be set to the following:
  [AUDI]
    - Billed = Add to
    - Annualized = Add to
      Note: It's important that audit transactions be entered against the policy term to which the audit applies – not just to the current term of the audited policy.
- Fee transaction for agency, company, and governmental authority will all be set to the following:
  [AFEE, AINS, CFIN, MEMO, NSF1, PFEE, POTX]
    - Billed = No effect
    - Annualized = No effect



Epic 2020 added some additional choices to the Annualized choices to more granularly control the way this field is calculated.

Refer to Applied Epic 2020 General Release Training titled "CALCULATE AND STORE ANNUALIZED PREMIUM FOR MULTI-YEAR AND SHORT-TERM POLICIES" for more specifics

Commission/Premium Calculations

This utility is not directly relevant to the main agency goal since it does not have any effect on the Annualized premium or commission amounts. However, there is a benefit in having policy downloads reflected on the Estimated commissions, so it will be used either every day or after every download.

*** Review Epic Help file "Commission/Premium Calculations Configuration " for more details.

Activities & Attachments in Epic

The filing of items and information is a comparatively minor task, but due to the number of times the average service team member will have to perform this task being so large, decisions related to efficiency here will have a noticeable effect on operational efficiency.

Maybe just as important, the decisions made here will have a profound impact on staff's perception of the agency management system "ease of use". A process that is generally perceived as being un-necessarily cumbersome, click-intensive, or non-intuitive can make training and adoption of new procedures much more difficult and painful than they need to be.

Account Level Functionality

We've all heard the phrase "begin with the end in mind". So before we get into any decision making, let's first examine one of those ends; retrieval of information stored in the system more than 2 to 4 weeks in the past. If we are not conversant with the features and functions our users have available at the account level, then it is likely that our decisions on how items are entered into the system will be far from optimal.

Activity Categories

In this area, you can add, revise, or delete the options that display in the Category dropdown menu when a user adds an activity. You can add multiple activity codes to each category so that those codes are the only options available for selection on activities within that category.

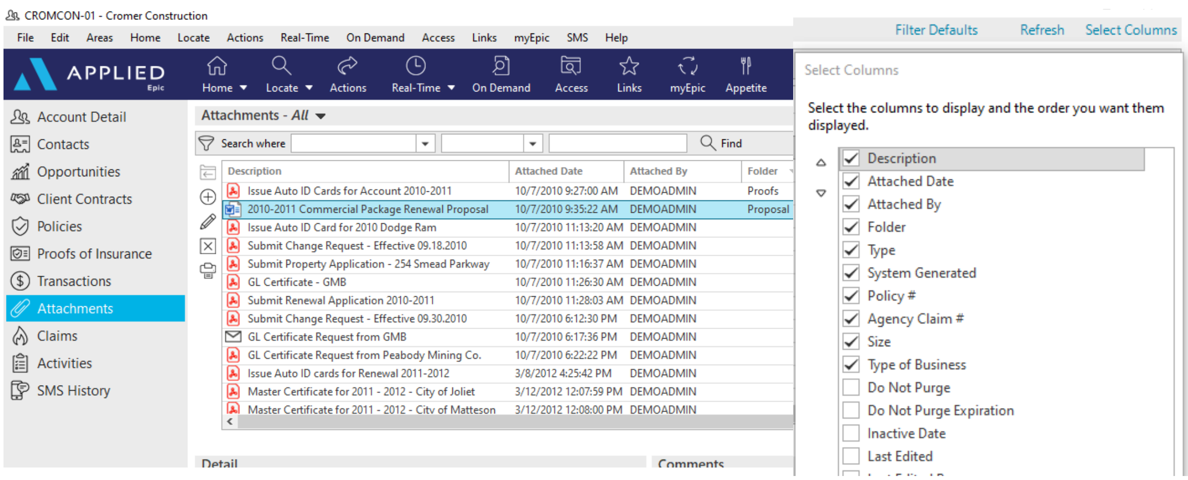
Selecting and Sorting on Columns

An understanding of which columns are available on the Attachment and Activity lists is important when considering the use of Folders and Descriptions.

While there are many issues to point out, here are a few that are directly relevant to the decision making we'll want to discuss later:

Folders & Sub-Folders

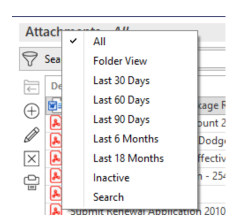
The ability to display and sort on folders is important when considering their usefulness.



Population of data

Some columns will only be populated if a specific workflow is used. For example, the Policy # column on the attachments list will not populate at all when associating to the Activity level.

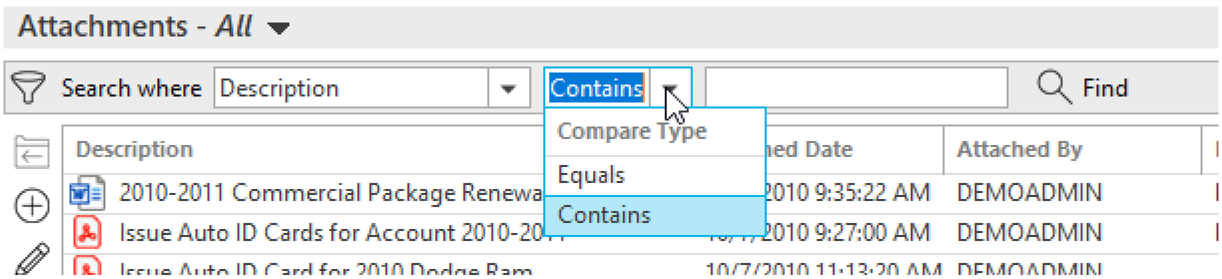
Title Bar Selection



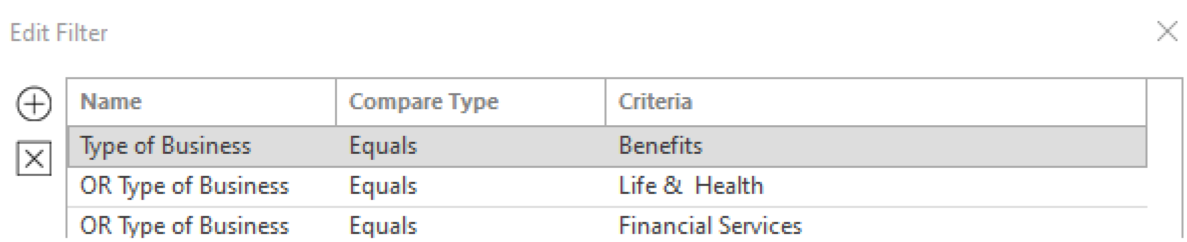
The columns shown will vary on some screens depending on the Title bar selection.

Search Where

The option to search on the description field using “contains” is extremely useful. Keeping this feature in mind can greatly reduce the number of other fields that you might want to require users to enter every time something is entered into Epic.

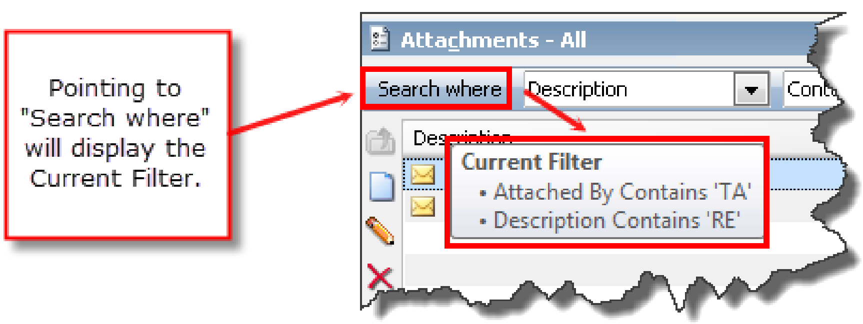


You can also set multiple search options for the some fields such as the Type of Business below.



Search within Search Results

If you are looking at a list that has a filter already applied to it, you can enter another Search criteria and it will be applied in addition to the existing filter so long as the “Search where” is not the same.



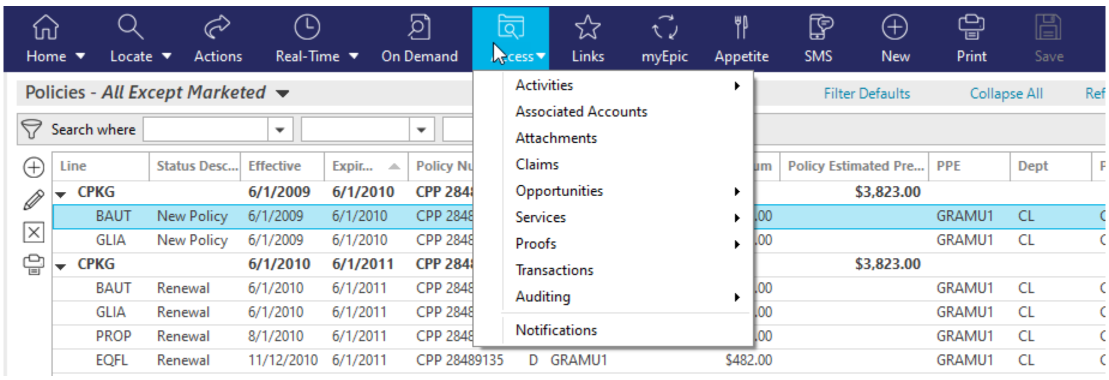
Meaning: If you do a search on Description, then try to add another Search on Description, you will end up with a filtered list only on your last description search. But if you do a search on Attached By, then try to add in a Search by Description, you will end up with a list filtered by both criteria at the same time.

Team members who do not understand when a Search will be applied in addition to an existing filter vs. when it will replace the existing filter may come to believe that the Search functionality is not reliable. But once known and remembered it is extremely useful and should be factored into the overall activity and attachment strategic planning.

Access Activities & Attachments

The Access drop down feature will take the user to another area of the Account file, and automatically apply a filter to show only the items related to the users highlighted selection when it was used.

With proper planning, this is one of the great retrieval features in Epic.



This is extremely useful for agencies that have written their procedures so that they extensively use key activities almost like sub-folders; where a single activity is noted and additional items attached to it over a process rather than adding a new activity for each step in the process.

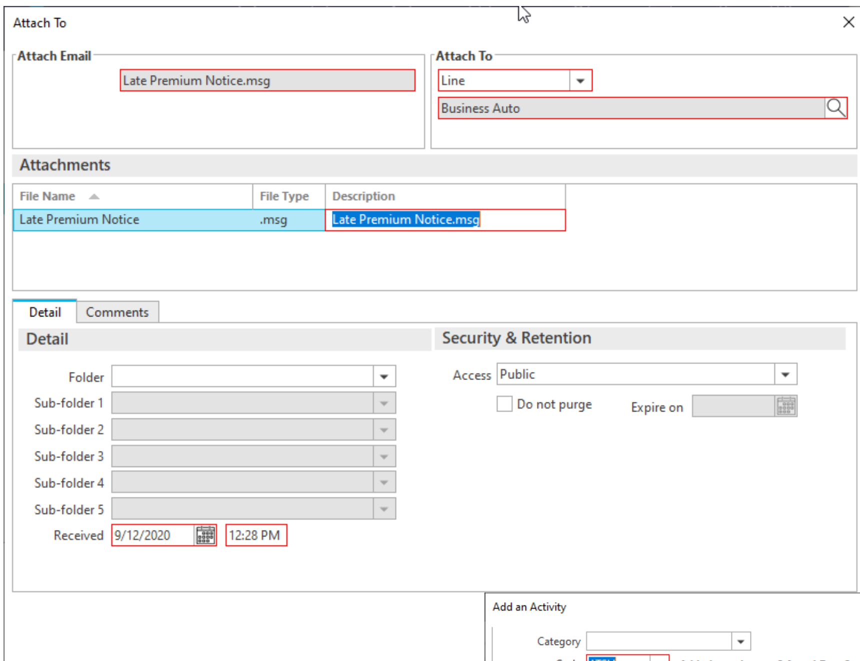
Attachments Folder View

The Folder View shows all folders, regardless of if that folder has been used with the Account or not. This makes it much less useful than if it displayed only those folders containing an attachment for the selected account.

Using Folder View in conjunction with “Search Where” seems to be more intuitive than using the “Search Where” multiple times for many users.

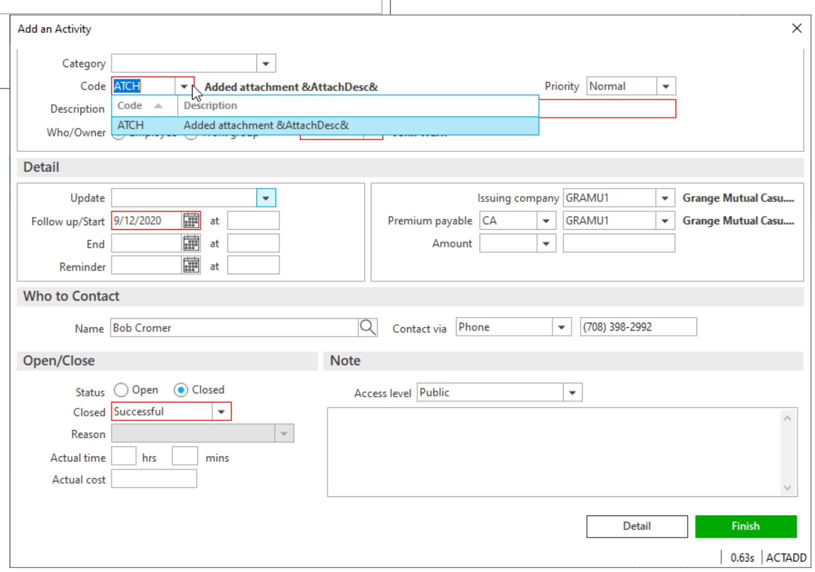
Attaching & Adding Activities

There are many ways that attachments and activities can be added to an Account in Epic; system events that will automatically add attachments, Actions that update service summary rows, the proper use of the distribution manager, and of course the manual filing of received or sent items. For our purposes in this class, we will focus on the filing of received or sent items, but there is certainly overlap between all of these different possible vectors.



Some members of our service teams may do this dozens or possibly even a hundred times a day.

By themselves, each keystroke or mouse click required at this level is not a big deal, but because it can happen so many times each and every working day they add up.

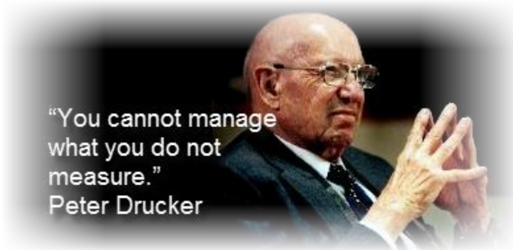


Much of our final decision making will bring us back to what we require of our team members when they are adding activities or attaching items. It needs to be included up here as part of the Account Level functionality, but for now let's just keep it in mind and continue on with the other elements that we need to consider before deciding on the what's and how's that we're going to make our users do here.

You don't have to enter something into every field just because it's there.

Reporting

When planning any agency procedure or workflow it is important to take into consideration what the impact of each decision will be on reporting. In some cases, there are promising workflow setups that run aground due to being difficult, or even impossible, to track via reporting.



Activity Reporting

There are a wide range of activity reports available in Epic.

However, there is a criteria omission that should be taken into consideration when making decisions on activity use in our agency workflows; it is not possible to include date fields as a criteria for either Activity Notes or Activity Tasks. These note and task date fields can be included in the output (layout) of an activity report, and the report can be run to Excel where the tasks or notes added to existing activities can be taken into account. But since it's possible to envision a procedure that instructs the user to add a note today on a "milestone" activity that was entered months ago, this may not meet all of our desired reporting requirements.

Attachment Reporting

There is one attachment report available in Epic.

It is important to note that when running the attachment report to Excel, a separate row will be included for the attachment and then for each associated item for that attachment if the associated fields are included in the report. So an attachment that is associated to a policy and an activity will have 3 rows.

Configuration

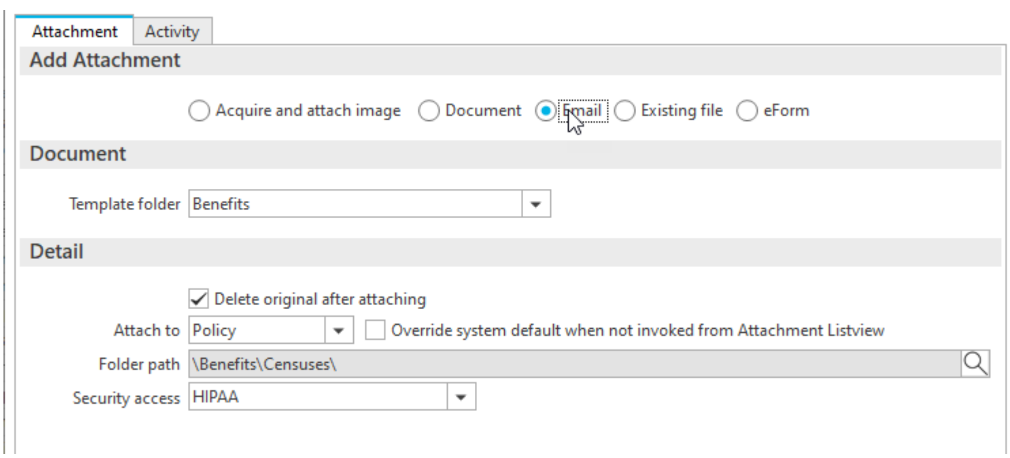
User Options - Field Defaults

User field defaults are a tremendously valuable weapon in our battle to improve operational efficiency and consistency. Each of the relevant "… Add Workflow" screens should be reviewed and setup for each user. Defaults can also be copied to other users with appropriate rights. This is extremely important for new users. Our focus for this part of our class will be on the "Attachment/Activity Add Workflow".

Attachment tab

There is a Document Template default folder on this tab which can be used to setup a default for each user. It makes sense therefore to create your template folders to match with job descriptions within your agency. So if there is a position in your agency for "Commercial Lines Account Manager" then setting up a template folder to match that position and then setting the field default to match for each individual working in that position will result in the list of templates they view being limited to only those relevant to their position while requiring no additional step or keystroke from them.

If the use of Folders is desired, but the agency does not see a need to have 3 levels to their folder structure, it is possible to setup the "Folder" to serve the same function for attaching that the Template Folder does for selecting templates. Setup the main folder level to match up with specific job positions. This way, the sub-folder selections they will be asked to make will be only those that are relevant to that job position.



Activity tab

Under this tab, the "Category" can be setup as a default. You will probably not be too surprised to learn that this too can be setup by specific job positions within the agency.

Attachment Folders

One of the objectives of this class is to assist agencies in thinking about how they will setup the folders in this configuration area.

Remember that the operation manager's job in this area is to keep the list as easy to navigate by the end users as possible.

The best way to do this is to keep the number of selections which the user will be presented with as short as it can be while still achieving all of the attachment retrieval and (eventually) reporting goals that have been set forth.

If a list of sub-folders must be longer than will fit on the users screen at one time, pay close attention to the naming of the folders; intuitive naming and/or careful deliberation over how the list is alphabetized should be employed.

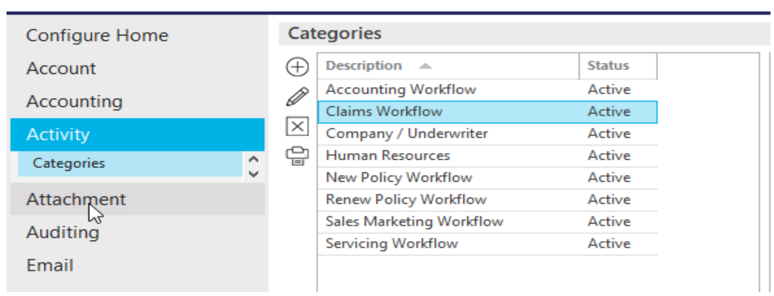
Activities

There is an entire class dedicated to the exploration of all the setup options related to activities, which every person engaged in operational planning for Epic should take. While we don't have time in this session to do this area justice, there are a few points that we need to look at before we get into the decision making area.

Categories

These will limit the number of activities a staff member will have to wade through when adding a user generated activity.

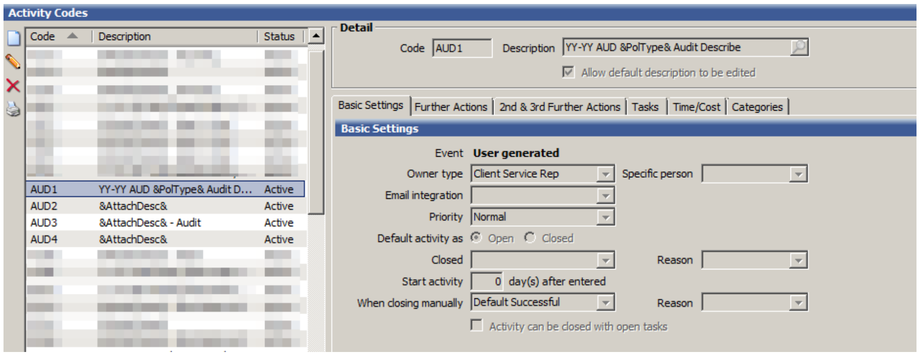
They can be set as a user field default, so if you set up categories by job position; it will require no extra keystrokes or clicks for the user while still keeping them from having to see codes that are not relevant to them.
Any single activity can belong to multiple categories.



Activity Categories are also helpful in reports.If Categories are setup by department of workflow, it is easier to pick a category that includes all of the activities in that category than to have to pick each one individually for a report.

Codes

Applied Systems has done a great job of building in features that keep the list of available activity codes that a user must choose from at any one time manageable.



Any activity that is tied to an event will not be available as a User Generated activity. So in some cases, you may have a need for a very similar activity depending on the method that applied in its creation.

Some agencies have been using numbers for the 4th position. So it's just a matter of putting something in the agency procedures manual and then configuring activities accordingly once you've decided on your chosen numbering system.

Procedure Manual sample
The first three letters of the activity code provide the meaning to the code itself. For example, the code AUD stands for Audit, SUB for Submission to Company, UND for Underwriting Information, and so on. The last character (fourth position) will have a unique numerical code based on how the Activity was generated: 1 = Manual Activity (F9) 2 = Attached (Drag & Drop) 3 = Event Related – Non Background 4 = New Epic Document (Generated within EPIC) 5 = Real Time Related 6 = Download Related # = Event Related – Background

There are several benefits from using this 4th character as a number indicator method:

- Written agency procedures are a lot easier to both create and later read when there is a single 3 character activity code referenced instead of multiple 4 character codes
- The configuration of activity codes is much easier when you can tell just by glancing at the list which codes are setup to be accessible by what user events or actions.
  Did we mean to add in a certificate code that could be used when doing a drag and drop attachment but forgot? It's easier to tell and keep track of when you're just looking for the number 2 at the end of one of the codes that start with CER.
- Activity reports begin to tell us not just "what" was done, but also a little bit of "how". This is useful if your agency is allowing users to tackle the same task using slightly different workflows - like allowing either an F9 to create the activity then dragging an attachment into that activity as opposed to doing the drag and drop of the attachment to the policy / claim and letting that event create the activity.

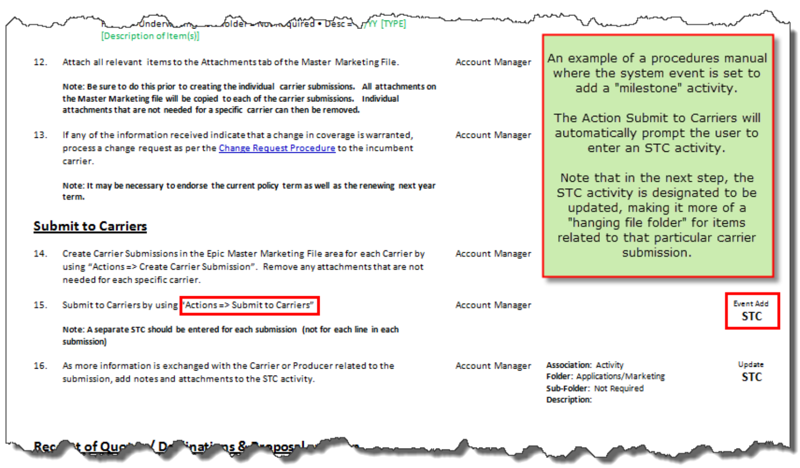
Description variables are very useful. Each activity should be reviewed to determine if setting up variables would be useful.

Events

Events control automatically triggered activities that result from a system occurrence.

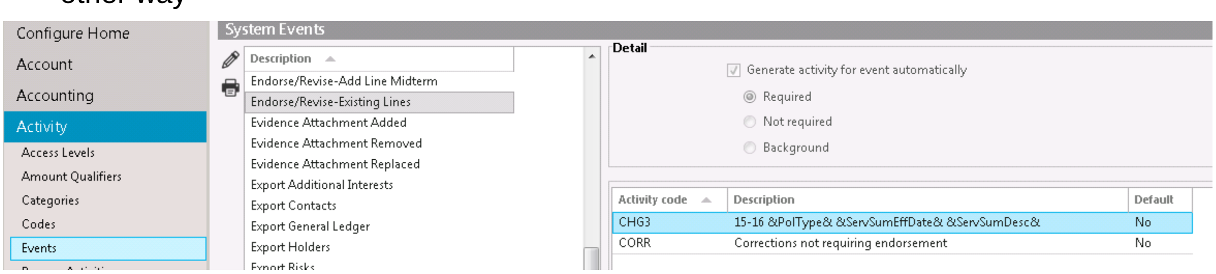
- Events can have one or multiple activity codes associated.
    - Multiple codes mean the user may need to select. (Usually, an event with multiple codes will not have one set to be the default so that the user will always have to choose from the available selections)
- Required Events generate activities that will be presented to the user and cannot be cancelled
- Not Required Event activities will be presented to the user but they can be cancelled
- Background Event activities will just quietly slide into the system without any presentation to the user
    - Background Events must have an activity selected to be the "default"

Setting up which Events will only generate a background activity, if the event will provide only a single activity or if there will be multiple choices are all decisions that should be considered during the creation of the agency procedures or workflow manual. Specifying an activity code that must be used, but then controlling which Event(s) will allow access to that code, is a subtle but powerful Epic feature.



Decide on how your agency is going to utilize Service Summary Row actions & stages before you get too far into changing the Event settings. For example: If your agency decides that when an agency processed request for change is done that it's important to create the Service Summary Row for the Endorsement right away, then…

- Make sure the Event for "Endorse/Revise-Existing Lines" is both turned on and not set to be "Background"
- That the activity for that Event is set to be generated automatically and required
- That the activity code required to record a change request in your procedures is the one tied to that event
- That the activity code specified in the procedures manual cannot be accessed in any other way



Remember the functionality of "Access Attachments" and plan what different types of attachments will be associated with accordingly. For example, if the attachment of "core" policy documents is setup to only be possible from the Add Attachment Event with no option to add the activity first and then attach to the activity, then access attachments from the policy level will pull up those main policy documents. Using the numbering system mentioned above, an agency wanting to pull up the main policy documents would never allow a POL1 since the 1 would indicate that they are added via F9 and then the attachments are associated to that activity. Instead, the POL2 would be the first in the POL series of codes, and it would be added under the Event for "Add Attachment".

Daily Incoming or available policy related items				
31.	Incoming paper policy related items are forwarded to the Acct Mgr	Receptionist		
32.	Incoming emailed policy related items are sent directly or forwarded to the Acct Mgr	Various	This POL is actually POL6 6 = Download	
33.	Incoming eDoc policy related downloads attach automatically to the Policy	System	**Association:** Policy & Activity **Sub-Folder:** Policies & Endorsements **Description:**	Event Add POL
Policy Received				
34.	Update the Service Summary Row Stage **(SSR) to Issued** Close the BND activity	Acct Mgr		Close BND
35.	Attach the received Policy (if not received as an eDoc)	Acct Mgr	**Association:** Policy & Activity **Sub-Folder:** Policies & Endorsements **Description:**	Event Add POL

This is actually a POL2
2 = Add Attachment

Authors Opinion

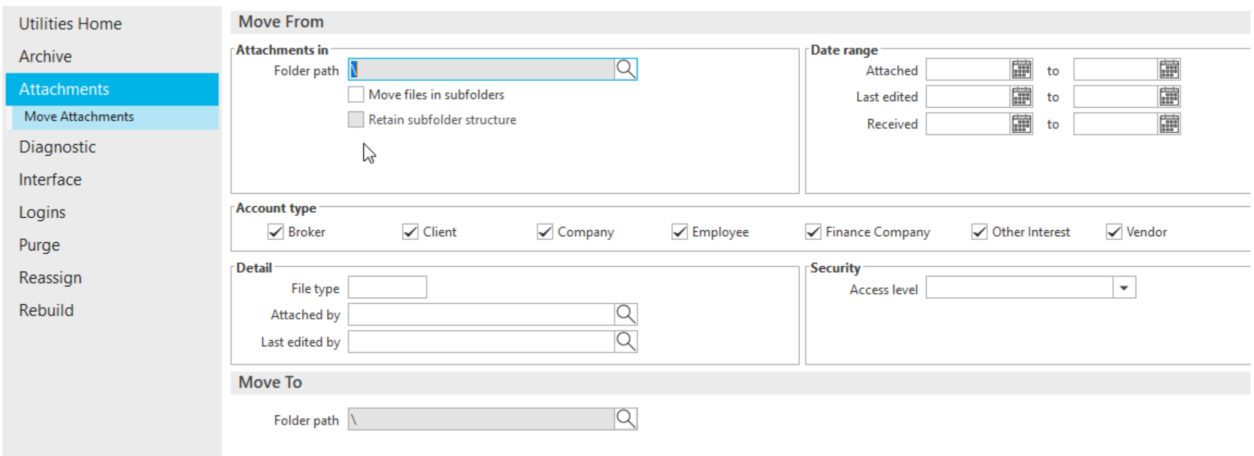
With the introduction of the background events option and hidden activities, no event in the system should be turned off. Instead, the decision is to have the user interact with the activity when they are performing an action or have the activity entered into the system without the user seeing or interacting with it.

If your agency has not made some of these decisions, or if management has not had a chance to evaluate the value of tracking a type of Event, then it should be set as a background activity.

If I'm going to make an error in having an Event generated activity as background or not, I prefer to error in the direction that requires agency staff the least amount of work.

Utilities

The Move Attachments utility makes it easy to reduce/simplify your Attachment Folder Structure. It is far less helpful if you want to increase the complexity of your folder structure.



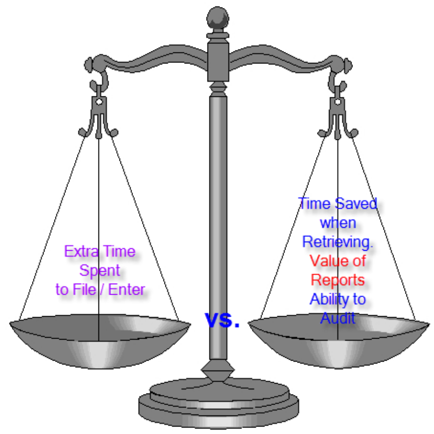
Agency Culture

There are some questions that we have to ask before we start making decisions that aren't really related to features or functions within the Epic management system.

- What types of reports reporting related to things like workload and system use will management really use? A lot of agency's like the idea of being able to generate such reports, but in reality would just never use Epic data in any meaningful way.
- Will we audit? Or is the annual review enough?
- How do we view the agency employees?
    - As highly competent insurance professionals?
    - Will they deliberately attempt to not use agency systems appropriately?
    - How closely do we believe we need to track what they do and how they do it?

Activities & Attachments – Decision Making

Now that we have some information relating to system functionality, reporting, configuration, utilities, and a bit of thought about the larger philosophical views within the organization all bouncing around in our head, we're ready to make some important decisions about how we want attachments and activities to be used in the agency.



- Associate Attachments to Polices or Activities?
- Have fewer, but "bigger", activities with multiple notes/tasks & attachments; in effect turning some activities into sort of 'hanging file folders" under policies?
  Or have more "smaller" activities that track steps instead of just the milestones?
- Are folders a good thing for the agency? If so, how many of them and to what level?
- Should users be given the security rights to set or modify their own User Field Defaults?

Appendix

Additional Resources related to this topic

Other Applied.Net 2020 Sessions

- Applied Epic Tips & Techniques Part 2: Administration"
- "Expert Panel: Optimizing Applied Epic"
- "Get the Book of Busines Report You Need in Applied Epic"

Epic Help

- "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"
- "Commission Fields and Agreements"