APPLIED NET 2020
THE DIGITAL PATH FORWARD

APPLIED CLIENT NETWORK

Applied Epic Tips and Techniques

Part 1 - Servicing: Home, Accounts, Locate, Policies

SESSION HANDOUT

Prepared for Applied Client Network and Applied Systems

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Target Audience:

X	Accountant/Bookkeeper	X	Producer
X	CSR	X	Trainer
	Carrier		Vendor
	IT Manager/Systems Coordinator		ALL
X	Operations		Other: (describe)
	Principal/Owner		

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Seminar Type:

Servicing & Workflows

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. For functional courses, it is *not* necessary for the attendee or participant to have previous knowledge of the agency or brokerage management system or software program.

Class Description:

In Part 1 of this 3 part series, we will cover the areas of Home, Accounts, Locate and Policies. During this series, you will learn more than 100 tips and techniques for using Applied Epic in your everyday workflows. From servicing and accounting to reporting and administration, this session uncovers many useful Applied Epic tips and techniques.

Learning Outcomes:

- Learn to work in Applied Epic more efficiently
- Learn to configure Applied Epic to reduce data entry
- Learn hotkeys and shortcuts to enable easier navigating around Applied Epic

Assumptions: This seminar is based on the following

Applied Epic Version 2020

Home

Configure what appears on Home via Configure > User Options > Customize Homebase

Dashboard

- Allows users and sales managers to view graphics of Sales Pipeline, goals, hit ratios, new business YTD
- Executive Dashboard shows more Sales Teams data if a user is marked as a Sales Executive at their Employee file

Activities

- Close multiple activities by highlighting, Right Click or Actions >close
- Right click works the same as clicking Actions (on any screen!) EXCEPT on Home, it gives you more options actually. Right click allows you to:
  - Close activity
  - Add Note
  - Add Task
  - Change Follow-up Date/Time
  - Change Who/Owner
  - View All Notes
- Customize your view by selecting other employees activities, tasks (with proper security)
- Select Activities to display through Customize View – set a date range for example when you are going to be on vacation to check what you will have due when you are gone
- Select Columns (on all list views!) to customize the view you want to see.
- You can Drag and Drop attachments right onto Activities appearing on Home

Activity at a Glance

- Quickly view the servicing contacts associated to an activity
- Double click on the name of a servicing contact to send an email to that employee

Activity - Tasks and Last Note Entered

- Allows you to toggle between tasks associated to an activity highlighted above or the last note entered on that highlighted activity
- Update multiple tasks by selecting multiple items, right click to Edit and select which area you want to update
- Also how you can mark multiple tasks completed

Opportunities

- View Opportunities for yourself and others (with proper security, and with other employees checked on the Employee file)
- View Opportunities for 120 and 150 days added
- You can Drag and Drop attachments right onto Opportunities appearing on Home

Report Quick View

- Add reports here from Reports/Marketing > My Reports > Actions > Deliver as Report Quick View
- Remove reports showing in Report Quick View through Configure > User Options > Customize Home > Report Quick View tab
- Deliver reports here that can be run at a moment's notice

New/Waiting

- With proper security you can see General Unrouted faxes that have not yet been assigned
- Double Clicking on an item here opens that area without having to navigate to it
- Unrouted SMS texts can be accessed from a link in this area
- If using myEpic, suspended workflows will be shown in this area

Notifications

- Barcode reminders appear here if setting a reminder date when adding the barcode (for backend scanning)
- Activity reminders appear here if a date and time are entered when an activity is added

New button

- Where to generate a Receipt for Payment for a client
- If configured as such, can create a payment (PYMT) transaction

Access button

- Print Blank ACORD forms can be found under Access > eForms (also can be found at the client level under New > Attachment > eForm). The eForms allow you to save a pdf of the form and they are fillable forms. If created from Home, then you are prompted to save eForm somewhere. If created from a client, the eForm saves to the attachment list.

Appetite button

- Appears as a button on the Options bar at the top of Home and also appears on the Policy list of any client with a policy indicated as type of business: Commercial Lines.
- Enter SIC codes and a state to find a list of possible markets.
- On the first few searches you do, you can indicate which carriers you currently contract with and then on future searches, they will filter to the top of the list
- If you don't need to see it at all, you can turn it off by deselecting it under Configure > User Options > Customize Homebase and uncheck Market Appetite Search

Renewals Manager

- To narrow results that appear initially, search to find your accounts (for example a particular servicing role), when you find what you need, click save as Filter Defaults
- Update stages to match your agency's renewal workflow steps

Locate

- Click on the arrow on the Locate button to jump to different clients that are open
- Quicklinks – lots of available information – Agency Defined Categories and Relationships are Quicklinks
- Select the Quicklinks that mean something to you – you don't have to view them all; setup through Configure > User Options > Customize Quicklinks
- Access Real Time from the Locate screen for the customer highlighted
- Update Real Time Local Security Products from the Locate screen
- When using Relationships to connect accounts, view two types of reports to see those connected accounts:
  - Locate > On Demand > Relationship summary – this lists all associated accounts to the selected account and gives you a premium summary for all related accounts (note this includes historical terms)
  - Locate > Access > Associated Accounts – this lists all associated accounts to the selected account and gives you a premium summary for all related accounts for their currently in-force policies only
- On Demand gives you quick access from the Locate screen to a Coverage Snapshot (can also click on F8 for that Coverage Snapshot)
- On the Broker, Company, Employee, and Vendor Locate screens, you can Click Actions to Modify the General Ledger Subaccount (handy for when they change their name!)
- Click on the email address link showing on the Account Address card to open an email (make sure that card shows your primary contact!)
- Add New items with the New button right from the locate screen
- Click F9 to add a new activity
- When adding a new business account, the SIC and NAICS code fields are available right after the account name and can be made required/desired

The Language of Epic

Understanding terms in Epic and where applicable, the comparable TAM name

Tasks = additional items that can be added to an activity to provide reminders/steps to take as part of the workflow that the activity represents
Locate or Accounts = Clients button in TAM
On Demand = where you go to print or preview various reports associated with the screen you are on
Relationship = Conglomerate in TAM

Accounts

Account Detail

- Send an intra-office email by clicking on the Servicing Contacts at the Account, Line of Business or Activity level and the email is automatically attached to that account.
- Set up Relationships to connect clients with other entities in Epic
- CTRL-R tabs you through REQUIRED fields only (anywhere in the system, not just Account Detail)
- Client Confidential Access allows you to restrict access to an account to a limited number of users without having to place the account in a separate department, branch or profit center

Contacts

- Update Contact information from applications to contacts
- Use Lookup to add contacts as drivers and other areas in applications
- Any phone type can be primary
- Use the Business Info tab on a business contact to record date business started, SIC code, NAICS, and DUNS, etc.
- Use the Identification Numbers tab on a business contact to add FEIN, this pulls into apps whenever that contact is selected
- Use Payment Methods to store checking and savings bank account information for EFT payments. This is stored securely with the Lock feature. Works on business or personal contact type
- For individual contacts, be sure to have a contact for each insured on the policy – husband, wife, children, etc. Record each person's email, phone numbers, etc.
- For individual contacts, enter in driving information as this area is not overwritten by download – so your dates of birth, social security/insurance numbers are safe here
- Click on email address right from contact list to create an email

Opportunities

- Track your sales pipeline and users' goals in Epic without duplicate entry into 3rd party software
- Can manage opportunities from Home by Customizing your Homebase through User Option
- View an Opportunity history to see how far along in the sales process an account is at any time

Policies

- Use Policy stages consistently: In process = working on it, Submitted = Bound,
  Issued = received, checked, out the door to client
- Use the policy description to help differentiate policy coverages – for example when you have more than one homeowners policy, use the description field for the address; caution: this field

could be used in reports, proposals, formletters, transactions, so know where else this will show up

- Review Application and Review Change Request lets you configure an activity and doesn't print house copy; Print Application or Change Request does not have an activity connected to it and prints "House Copy" on each page
- Print a Statement of Values using the Print button and save yourself time from going through Review Application process and having to select only this one form, works when you have selected a Property policy type from the policy list
- Use the Access button to filter down to many areas: Activities, Attachments, Transactions, etc.; this is an efficient way to see everything associated with a policy rather than go to each of those areas and filter back to the policy
- Policy Quickview under the On Demand button allows for quick access to see coverages on a PL Auto, Home, Mobile Home or Dwelling Fire policy
- Coverage Snapshot can be used to view coverages on Business Auto, General Liability, Personal Auto and Homeowners policies
- Service Summary Comparison is a great tool to compare policies
- Some often forgotten Actions: Copy AP Section, Import and Export risks (you can import and export named insureds, locations, vehicles, drivers and scheduled equipment)
- Copy Policy Action allows you to copy a policy to the same account or to another account, doing so creates a "NEW" service summary row
- If you export the driver/vehicle/equipment list from Epic, send to your client to update, then use that list to import, it saves on formatting time
- You can select Prefill applications when adding or renewing a policy to take advantage of commons information, limits of insurance options, etc.
- Renumber Scheduled Items when a policy is 'In Process' via a link on the scheduled item area of the application
- Require at least one Producer or Broker to be listed on the Pr/Br Commission tab of the Policy Servicing/Billing screens (setting in Configure > Policy > System Settings)
- Can Remarket to another account under Policy Marketing
- There is an option in Security to mask Producer/Broker commission information on policy and transaction screens (Configure > Security > Groups > Program Access > Insured or Prospective Clients > Policy

Proofs

- Clicking on New lets you add an item for the area you are (i.e.: when in Binders, click New > first item on the lists is a binder)
- To add new holder on Certificates or additional interests on Evidences, just add new from the holder/ additional list, you don't have to open the certificate up first
- Add attachments to the certificate itself (i.e.: blanket additional insured endorsements) and they will print with each certificate
- When renewing a certificate, be sure to choose to renew the holders to allow for easy use of issuing the certificate and sending out all certificates – be sure you have the print/fax/email options selected for each holder – they renew accordingly
- Be sure to inactivate holders so they don't get renewed on next year's certificate

- You can change the named insured that shows on the certificate per holder – under the Holder Details tab
- You can copy holders from another certificate with the link in the upper right hand corner and select the certificate you want to copy from
- You can print a holder list from the print button by the listview (it will print the data showing on the listview) or with the On Demand button – which gives you more options as to what prints. You can also Export the holder list to Excel with the Actions button
- When adding attachments to the certificate itself or a particular holder, to find the right attachment easier, adopt a naming convention for example put an * at the front of the attachment name

Transactions

- Access Transactions from the Policy listview in order to see only those transactions (both current and future) for that particular policy term
- To see how payments were applied, select the Open Item view
- To move an item from one invoice to another, select Actions > Move Transaction, select the invoice to move to, then Generate Updated Invoice to print/distribute the corrected invoice
- You can quickly see if an agency bill item has been paid to the company by selecting to view the Payment Status column; O = Outstanding, not paid to company, C = Closed, paid to company
- Void a Payment at the Transaction level and you can add in an NSF fee as well (this method also does not void an entire receipt)
- Many actions in Transactions are configurable and as such can have an activity generate for documentation or follow up
- Generate Tax/Fee can be done when you are entering a transaction or afterwards, by highlighting the transaction against which taxes/fees will be generated, select Actions > Generate Tax/Fee
- Setting up Government Fee/Taxes creates payables to those state or municipal entities
- You can UNAPPLY credits to debits

Attachments

- When attaching an email via drag & drop, hold the shift key as you drag it so you do not have to go back and delete it
- Add comments to your attachments – also searchable (though not protected like an activity note is)
- Search within search to narrow down choices
- If using Folders and/or Sub Folders for organizing attachments, select the Folder view option
- You can Move attachment if attached to the wrong client or to another folder (you can also Edit Attachment Details and select another folder);
- You can also use the Move to another client option to “move” it to the same customer but to associate it to another area if it was associated to the wrong thing when attached
- Multi select attachments and select Actions > Send through email in order to include them in one email; you can also click the paperclip icons when sending an email in Epic to attach either client documents (red paperclip) or files on your computer (black paperclip)
- Add multiple associations to an attachment via Actions > Edit Attachment Details
- Set defaults for Attachment Display

Claims

- Include the paid and reserved payment fields in your listview for claims in order to see at a glance how much has been paid on a claim
- Use the Summary Only option to complete a claim detail screen but not an ACORD loss notice (found in the Claim Type drop down)
- Select risks at the claim detail screen so they pull into the loss notice
- Add claimants, witnesses, injured parties on the Additional Parties tab in order to pull them into the loss notice where appropriate and also in order to search on them from the Locate screen
- Multiple claim codes can be included on one claim, example: Auto BI Liability, Auto PD Liability, Auto Collision (and codes are agency configured)
- Claim Types can be configured to associate to only selected Claim Codes, i.e. Auto Claim Type could have Auto BI, Comp, Collision, Glass as associated Claim Codes (Configure > Policy > Claims Types)

Activities

- Right click on an activity to add notes, tasks, change the follow-up date, change the Who/Owner and close the activity. Also can Reopen the activity with proper security.
- View all notes in one of three ways: use the On Demand button, open the activity and click the ‘View All Notes’ link, or use the Print button to print all activity notes
- Multi select tasks, then select Edit (the pencil) and select what you want to edit – for example update the status of all the tasks highlighted to completed

The Language of Epic

Understanding terms in Epic and where applicable, the comparable TAM name

Service Summary Row (SSR) = how Epic tracks the life of a policy, each SSR is its own iteration of the policy and complete application.
In Process/Submitted/Issued/Cancelled/Reinstated = the various stages of each SSR, they also affect whether you can edit the policy data on the applications.
In Progress/Completed/Cancelled = standard stages of policy marketing submissions (which can be configured to meet an agency’s needs)
System Events (usually those things found under the Actions button) = the things you do to a policy which can be configured individually to have an activity or not.
ICO = Issuing Company
Premium Payable = Billing Company, can be either a broker or carrier
Proofs = Binders, Certificates and Evidences
Transactions = Invoices in TAM
Folder/Sub Folder = Category/Sub Category in TAM
Templates = Formletters