

Applied Epic Tips and Techniques

Part 2 – Admin: Configure, Procedures

SESSION HANDOUT

Prepared for Applied Client Network and Applied Systems

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Target Audience:

<input checked="" type="checkbox"/>	Accounting	<input type="checkbox"/>	Marketing
<input type="checkbox"/>	Administration	<input checked="" type="checkbox"/>	Operations
<input type="checkbox"/>	Claims	<input checked="" type="checkbox"/>	Sales
<input checked="" type="checkbox"/>	Customer Service	<input type="checkbox"/>	Underwriting
<input type="checkbox"/>	Human Resources	<input type="checkbox"/>	ALL
<input type="checkbox"/>	IT	<input type="checkbox"/>	Other: (describe)
<input type="checkbox"/>	Legal		

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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 2 of this 3 part series, we will cover the administration areas of Configure and Procedures. 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 2021

Configure

Account

- ❑ Set up contact classifications, agency defined categories, account sources, etc. to support marketing efforts, and reporting purposes
- ❑ Agency Defined Classifications added to a Line can be marked to delete at renewal, i.e.: code for cross-sell to be used on new business, but not carried over to renewal term
- ❑ Establish Servicing Roles – something you do when setting up the system, but if you add a position (i.e.: claims manager, loss control, etc.) remember to come here to add the role so it's an option at the client level and add the role to the employee file
- ❑ Set up when Epic runs a duplicate account check when adding either clients, companies, etc.
- ❑ Define Relationships to reference actual situations your agency encounters
- ❑ Opportunities – Stages, Groups, Products and Sales Teams are all related to using Epic as your CRM tool
- ❑ Define Field detail descriptions for Employee Benefits tab

Accounting

- ❑ Update check, invoice and statement layouts here – include agency logo for example
- ❑ Use the Reassign Check Layout action to update client detail screens with the invoice or statement layout you want them to use
- ❑ Set up Default/Recurring entries here (can also do on the fly in the appropriate General Ledger area)
- ❑ Use Schedules to identify expenses within expenses, for example: Cell, Landline, Internet, could be schedules used within a Telecommunications Expense account, saves from having separate expense accounts
- ❑ Configure Transaction Codes and Installment Plans to pull data in automatically to the description, saving staff from having to type a description for each transaction and also creating consistency.

Activity

- ❑ Events – determine if an event should generate an activity or not and if so, required or not, or if the activity should generate in the Background
- ❑ Establish the appropriate activity codes associated with an event to minimize user selection and make workflows easier and more consistent
- ❑ Utilize activity categories to group your activities for reporting purposes – helps to identify how much work is done in a particular workflow (i.e.: new business activities)
- ❑ Process Activities Schedule to allow further actions to generate
- ❑ Hidden activities allow for an activity to generate but not appear on the activity list unless searched for, reducing clutter on the activity list; still can be included in Activity reports if selected
- ❑ Workgroups allow you to establish a team approach to who should follow up on activities

Attachment

- ❑ Templates, Fax Cover Pages, and Summary/Proposal Templates can be copied to a new Template allowing you to update the new template without having to start from beginning
- ❑ Master and Paragraph templates allow you to create a “base” template with styles, fonts, etc. for your agency branding that are easily updatable when changes are needed
- ❑ Establish Access Levels for appropriate security – and then make sure to configure in security
- ❑ Setup System Generated Attachments here to have the appropriate folders, security and where applicable, client accessible
- ❑ On the Attachment Folder area, click On Demand to generate an attachment folder list report that lists all folders/subfolders as well as indicates how many items are attached in Epic using that folder structure, can do this for all entity types – Client, Company, etc.

Auditing

- ❑ Turn on the Auditing feature of Epic here, then look to Procedures > Auditing to run client or user auditing reports.

Email

- ❑ Opt to use Epic Custom Email format, use Outlook for email, or let the users make their own selection. If letting users choose, go to Configure > User Options > Email to make that choice
- ❑ Email Templates can be created for use when sending something through Epic’s Distribution process. These form templates allow for standardization of messaging as well as creating efficiencies to save your staff the time of typing the same message over and over.

Interface

- ❑ Company – Interface Setup can be copied from one company to multiple other companies.
- ❑ Activities can be generated for each type of download received – Policy, eDocs, Claims, and also for Premium Increases and/or Decreases created when an Exception percentage or dollar amount is established
- ❑ eDoc configuration allows for creating customized attachment descriptions for each type of document downloaded
- ❑ Service Summary Row variables can be used in eDoc descriptions

Job Management

- Ensure Fax and DMS Email setup is correct here to allow for successful email/fax distribution methods

Links

- Agency can set up an agency-wide “favorites” rather than each user having to maintain list
- Links can also link to Network documents such as an agency Procedure manual.
- Organize links into Groups for easier access

Policy

- Pre-fills – set up default applications so users don’t have to complete all data on an application
- Set up Custom Forms for all non-ACORD type coverages – these are importable too, so you can work on them in a demo environment and then import (see Additional Resources in the Applied Epic Help File for Custom Forms for common coverages)
- Setup Additional Coverages and Forms and Endorsements to be used on applications to allow for consistent data entry and allow for the ability to pull those coverages into proposals or summaries in an appropriate format
- Commission/Premium Calculation utility is configured here
- Update Renewals Manager stages to match your agency’s renewal workflow steps

Proofs

- Set up a FLEET auto ID card for a state by adding a new ID card, select the options under Card tab, and under the Detail tab, type FLEET in the Special Wording section and check the radio button for Replace Vehicle Detail
- Binders – check whether or not you want a binder to be issued for above policy limits (also applicable to Certs and Evidences), set expiration date default and where to default additional interests
- Certificates – you can choose to remove the watermark “Insured Copy” from the insured copy
- On the Holder Options tab, you can choose to default additional interests as holders
- Set up the import and export file structure for Holders

Real Time

- Set up Finance Company integration if available
- Set Rate Manager to create an activity for each session or each quote in the session

User Options

- A manager can set up for one employee and copy settings to multiple other users for consistency in agency. Applies to Customize Quicklinks, Customize Sticky Notes, Field Defaults, Notifications, Print Destination, Region and Language and VINLink Decoder (Canadian tool)

Procedures

Accounting

- Accounting – Month-End Journal entries can be scheduled to automatically generate on a One Time, Daily, Every Weekday or Weekly basis
- You can setup a JE report to email you automatically after your JE's have been generated or you can save your JE's to a file location every time they are generated (through Configure > Accounting > System Settings)
- To re-open a year, you have to re-open the last month of the year
- Remember to Generate Invoices on a regular basis to make sure individual invoices generate as well as installment invoices

Activities

- Be cautious about Manually Processing activities here – rather schedule them to occur at regular intervals through Configure > Activity > Process Activities

Auditing

- Select Client Access Logs - Client Search to identify which staff members worked an account, can also run this report at the client's locate screen
- Select User Search to identify when a staff member was logged into Epic and which clients they went to and which areas they accessed – policy or activity, and whether they viewed the list or opened a policy.

Document Management

- Unrouted Attachments and Unrouted Faxes can be attached through Drag & Drop.
- Batch can be previewed by user doing the scanning prior to saving
- Print Employee barcodes here for front end scanning purposes, as well as separator pages (you only need one employee barcode on the top of the stack, use separate pages after that to distinguish different documents)
- Unrouted attachments and faxes – quickly change the assignment to another employee with Actions > Assign/Reassign Fax and enter in new employee code
- Attach attachments and faxes here by right clicking or click Actions > Attach Fax, you can also Drag and Drop the fax to the proper entity
- Check unrouted attachments and faxes by Group (uses your security groups) to quickly see items that have not been attached
- Batch scanned documents can be attached as PDF or TIF files

Export

- Allows for exporting templates, proposals, cover pages, etc. and then you can import them in this same area – especially useful when you have worked in a demo environment to set up templates – you can export them out of demo and import them into production)

Import

- Allows for importing prospects and custom items (i.e.: templates, proposals, custom forms)
- Custom items (i.e.: templates, proposals, custom forms, supplemental screens) can be downloaded through Epic Help, Additional Resources, Policies

Interface Management

- Schedule IVANS download to run automatically for you
- Setup communication log reports to generate automatically in your preferred format at a time following the scheduled download process – select email of a pdf or Excel file for example sent to the appropriate staff who manage download
- Customize the Communication Log through Reports – Interface. You can add or delete information on the report, change the sorts and change the output to Excel if desired.
- When assigning Policies in Suspense, you can add a note to a particular item as a reminder of why it's in suspense, who is working on it, etc.
- View the Dashboard to see data about download received and why items go to suspense
- Download Results provides a way to view different download data – policies, errors, commissions, etc. instead of having to run a report or look at older Comm Logs
- Delete a download you want to get back? The Recycle Bin now allows you to find those items and bring them back for processing

Job Management

- Check the Print Queue if you have automatic letters set to print from activities, print letters as they appear here
- Find all Scheduled Jobs here – and go here to remove jobs (cancel) that you don't want to run any longer
- Can update recipients of scheduled reports instead of having to cancel/purge the job and reschedule it.

Policy

- General Bulk Renewal Logs can be found here