Creating new account in EPIC

Before creating new account in EPIC always check if the client is setup in EPIC or not. This is to ensure that we are not creating duplicate account.

Login to EPIC. Click on Locate button on top of the screen.

Select Locate account as Client and Locate by as Account/Business Name

Type the name of the new client in Account/Business name contains. If the account is in EPIC, you will see the name and lookup code on Results section. If the account is not in EPIC, click on Add button

Below screen will open. By default Type will be selected as Prospect. Make sure to select Type Insured from the drop down list.

In the client is a company, select Business radio button, or else select Individual (for Personal line policies, client will be setup as Individual)/

Enter below details. Note red highlighted fields are mandatory to fill.

First Name, Middle Name, if any and Last name of the client.

Agency

Branch

Address

Click on Generate code. Account Name & Lookup code fields will automatically filled. Please note if the client has middle name, the account name will automatically fill with First & Last name. You will have to add middle name

Fill all other clients details available like their residence/mobile number, Business Phone #. In the Description field, write the name of the client. If you want, update notes in Comments field. If the client is related to any of the existing client, then click on add button in Relationship section and add existing clients lookup code. Click on Continue button

Below screen will open. Go to Servicing tab and update the Client Service Rep (CSR) and Producer

If you want to update the email of the client, go to Contacts, select the existing contact line and click on Pencil.

Below screen will open. Go to Email/website section and update primary email.

The client account is not setup in EPIC.

Creating New Policy in EPIC

Once new policy is bound, even if you have not got the policy document, you will have to create the policy in client’s account. This is done because when the policy documents are auto downloaded in EPIC, if policy line is not created in EPIC, those policies will fall under interface management Suspense queue. Below are the steps to create new policy line in EPIC.

Open the account. Go to Policies. Click on Add button.

Select Contracted button and fill below details in Policy Details field

Type : Policy Type

Description : You can make your description or use default description

Policy # : If you do not have the policy number, then you can leave this field blank

Effective & Expiry

Premium

Commission

In Line of Business fill below details

Status : New

Select if Agency or Direct billing

Select the name of Insurance company from issuing Company dropdown list & Premium payable dropdown list

In Line Commission field, update Agency commission %age. Below is the snapshot after filling information.

Click on finish button

Below screen will open. Go to Servicing tab and check if correct CSR and producer is populated. If there is any producer, go to PR/BR Commission tab to add producer code and producer commission %age and click on Finish button. Policy line is created.

Lapsing Policy :

If client has requested to cancel the policy or they no longer need the policy on renewal, the policy needs to be cancelled or lapsed in EPIC. The status of the policy in Policy section needs to be changed to Cancel or LAP.

Cancelled Policy : Go to Policy Line. Highlight the policy to be cancelled, right click and select the option “Cancel”. Enter Policy cancellation date in Cancellation Effective field, add description whatever applicable (cancelled, lapsed, property sold, cancelled on insured request etc). Click on finish button

Below screen will appear. In Open/Close section, select Closed and Successful as shown in below screenshot and click on Finish button.

The policy will be “In Process” status. Click on Action button on top of the screen and click on “Issue Cancellation” Policy will be canceled and status of the policy will be changed to Cancel.

Lapse : If client do not want to renew the policy then we need to change the status of the current policy to Lapse so that it does not appear in the renewal report.

Double click the policy to be Lapsed. Click on Line on left side of the screen. Select LAP from the drop down list of Status field. The status of the policy will change to Lapse.

Inactivating Client in EPIC

We need to keep our database clean and up to date. If any client do not have any active policy, we need to make the client Inactive in our system. Below are the steps for making client account inactive.

Locate the client in EPIC. Go to Accounts Details. Go to Action and select 5th option Inactivate/Reactivate Client

Below screen will open. Select the Reason of inactivation from the list and click on Finish button. Client is Inactive now.

Sometime while inactivating the account, you might get the error message “Unable to inactive due to open activity” then this is because either the account balance is not zero, you have open activities in account, policy is “In Process” status or accounting reconciliations is pending. Clear account balance, close open activities, and status from “In Process” to “Issued” and inactive the account. If you are still not able to make the account inactive, add activity to 30 days, as reconciliations will be complete in a month.

Below is the snapshot of the error message while inactivating the account