

### **Learning Objectives**

In this workflow you will review basic system features and learn how to Log into and out of Applied Epic. You will also review and define the various parts of the Home Base screen. Learning objectives for this chapter include:

- 1. Logging into EPIC
- 2. Home Base
- 3. Printing an Activity List & Blank Acord Forms

### 1. Logging into EPIC

To access Applied Epic, you must first complete the Sign On screen. The Sign On screen prompts for a user code and password, and it allows you to choose a data source. Double click the Applied EPIC icon on your desktop to access the Epic program.



#### a. Usercode & Password

(Please DO NOT change your "Password" at this time.)

Your "Usercode & Password" has been provided to you in a separate document. Epic is enabled with a single sign on capability. After you have logged into your machine for the first time you will no longer be prompted to enter your "Usercode" or "Password". The "Usercode" link on the Signon screen will be a link that enables you to access the password field if necessary. The "Options" button allows you to change the data base.



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#### b. Database

You can see which EPIC Database you are logging here. During training you will want to make sure that you are logging into the "Training" database. If necessary, click the "Options" button. The database selection box will appear. Click the drop down to see a list of choices and choose "Training." Epic remembers the last database you have accessed.

Once your training is complete, you will need to make sure you log into the "Live" database.



#### c. Logout Button

The *Logout* button is located on the far right side of the options bar. Clicking this button ends your Applied Epic session and closes all open windows. When you log out, you may be prompted, "Do you wish to close all Applied Epic windows?" If you do not want this prompt to display in the future, select the *Do not show this message again* checkbox before clicking *Yes*.



#### **PEPIC TIP**

You can also determine whether or not this message should display at any point by right clicking the Logout button and checking or un-checking Display Logout Confirmation.

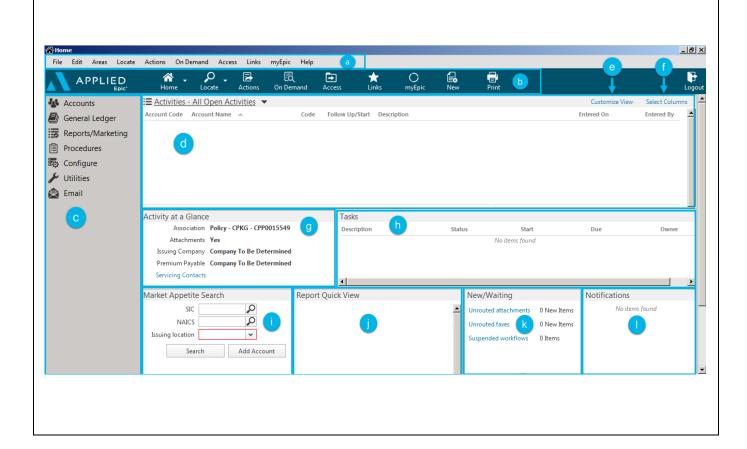
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### 2. Home Base

- 1. Once logged into EPIC, **Home Base** is the first screen that displays. The areas that display on **Home Base** may vary based on your individual setup. **Home Base** is comprised of the following sections:
  - a. Menu Bar
  - b. Options Bar
  - c. Navigation Panel
  - d. Activities List
  - e. Customize View
  - f. Select Columns
  - g. Activity at a Glance
  - h. Tasks (Service Unit Only)
  - i. Market Appetite Search
  - j. Report Quick View
  - k. New/Waiting



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#### a. | Menu Bar

The "Menu Bar" has various options that will change depending on the portion of the program you are in. For example, from Home Base, "Actions" will provide an option to change your password, where as in "Account Locate", it will provide an option to "Inactivate" or "Reactivate" a client.

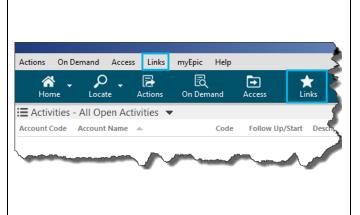
File Edit Areas Locate Actions On Demand Access Links myEpic Help

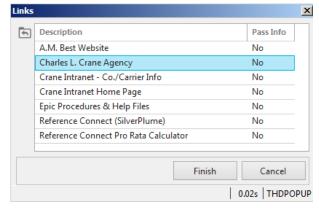
#### b. Options Bar

The "Options Bar" is what you want to do. One of the first things you may notice about the "Options Bar" is that it contains many of the same options as the "Menu Bar". Like the "Menu Bar" the options under the "Actions" will change depending on where you are in the program.



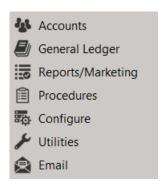
The "Links" option gives you access to pertinent websites and third-party applications without having to exit Applied Epic. To access Links, click "Links" on the "Options Bar" or "Menu Bar".





#### c. Navigation Panel

The "Navigation Panel" is <u>where you want to go</u>. Access to some of these options is dependent upon your specific security settings and role within the agency. For example, an Accounting staff member will have access to "General Ledger" whereas a Unit Service Rep will not.



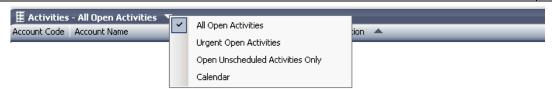
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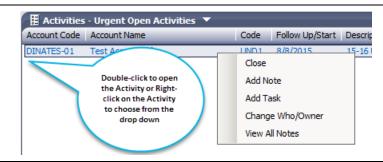


#### d. Activities List

The "Activities List" functions as your suspense or "To-Do" list and will display any activities that are due. It is recommended you keep your list default to "All Open Activities" so you don't miss anything important. However, like many of the lists in Epic you can filter the list by clicking on the link and changing the view. When you click the link you can choose to see "All Open Activities", "Urgent Open Activities", "Open Unscheduled Activities Only" or "Calendar".



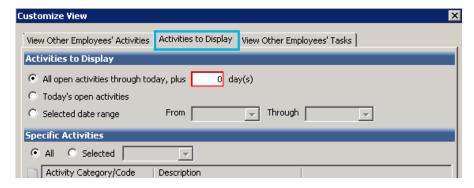
To view more information for an activity in the list, double click it. To perform actions on an activity or multiple activities, select the *activity* or *activities* in the list and right click the selection.



#### e. | Customize View

You can customize the view for any list in EPIC by choosing "Customize View". "Activities to Display" changes what activities are shown on your Home Base screen based upon the parameters chosen. It is recommended that you keep the view on <u>all</u> open activities, but if you do use this option, remember to reset after you have found what you are looking for.





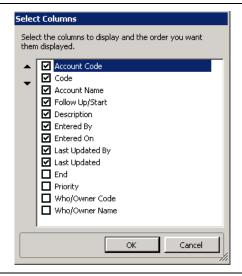
#### **PEPIC TIP**

Viewing other Employees' Activities and Tasks are dependent upon security settings. These options are not available to all employees.



### f. | Select Columns

The "Select Columns" link will provide a variety of fields you may choose for viewing Activities. To change the columns that display in the list, click the Select Columns link label on the Activities header bar. Once chosen, you can use the arrows to move the columns into position.



You can also drag and drop the columns in the order you would like them displayed when you are on Home Base.





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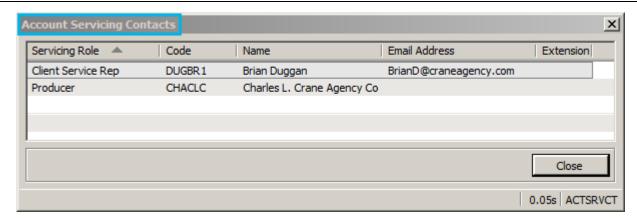
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g. Activity at a Glance

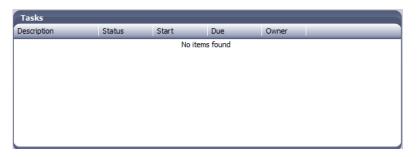
The "Activity at a Glance" section gives you basic information for activities selected in the Activities list. For example, if there are any attachments to the Activity. Servicing Contacts can be viewed by clicking the "Servicing Contact" link below.





h. Tasks - Service Unit Only

If the activity selected in the Activities list has any open tasks that are assigned to you, they display here. To edit a task, right click the task and click *Edit*. You can apply the same change(s) to multiple tasks by selecting multiple tasks, right clicking the selection, and clicking *Edit*. At this time, "Tasks" are only used by the Service Unit.



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#### i. Report Quick View

**Report Quick View** gives you easy access to frequently run reports. The **Report Quick View** area is comprised of a list of link labels. When a link labels is clicked, it generates a print preview of the report with which it is associated. **Report Quick View** will allow you to access pre-defined reports that you can run "on demand." For example, if in the past you have requested an Open Claim report each month, the IT department can set up the parameters in a report for you and deliver it to your Report Quick View. To run the report, you would simply click on the link in Report Quick View to run the report at your convenience. If no reports are set up to deliver as Report Quick View links, the message "No items found" displays in the Report Quick View section.



#### j. New/Waiting

Crane has implemented front end scanning. Mail that is received is sorted and scanned and may be distributed electronically by the Service Unit. The New/Waiting area contains notifications regarding "Unrouted attachments", which are defined as mail or faxes that have been distributed electronically. From this area these items can be attached to an Account or Policy, or redistributed. At this time, "Unrouted faxes" and "Suspended workflows" are not being used by Crane Agency.



#### k. | Program Notifications

If your system is set up for notifications, a notification window displays in the bottom right corner of the screen when the Distribution Manager has sent -- or has not sent -- a document, and/or when a file has been attached - or fails to attach - to an item in Applied Epic.

To scroll through the notifications, click *Previous* or *Next*.

To delete a notification, click the **Delete** button X.

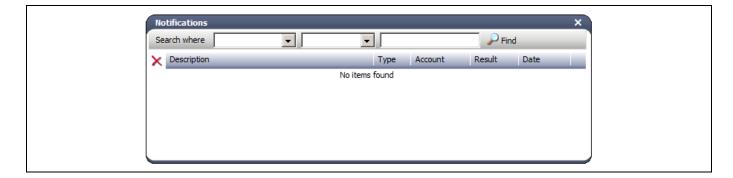
To view your current Notifications, do one of the following:

• Click Access, Notifications on the Options Bar or Click Access, Notifications on the Menubar.

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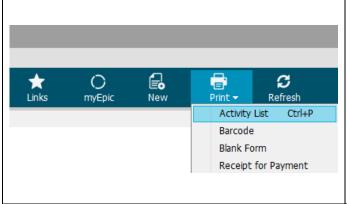
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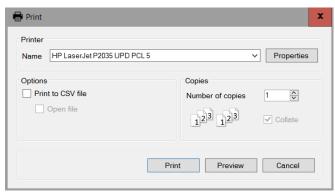
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### 3. Printing an Activity List & Blank Acord Forms

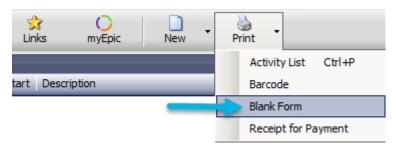
This feature allows you to print the list of activities that are currently in the list.



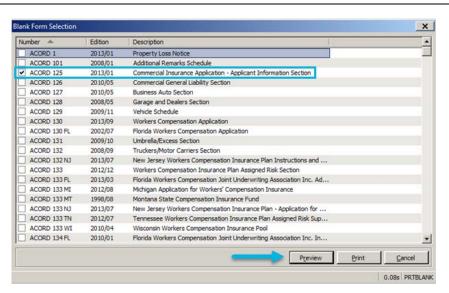


#### **Printing Blank Acord Forms**

Another nice feature available on the "Options Bar" under the "Print" icon is the ability to print blank ACORD forms. If you are meeting with a prospective client and would like to take a blank form to obtain coverage information, you may print a form by accessing this option. Simply click the drop down next to the Print icon and choose Blank form.



A list of forms will populate. Choose the form(s) you desire and then select "Preview" or "Print".



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