

Epic Benefits

Manage both your P&C and Benefits business with Applied Epic®.

Applied Epic is the world's #1 agency management system and it delivers powerful capabilities for you to run both your P&C and Benefits businesses so you don't have to waste time and money on separate systems.

Management systems aren't just for P&C agencies anymore. Applied Epic incorporates native Benefits functionality so you can easily manage both your P&C and Benefits books of businesses in a single platform. This centralizes your data and gives you a holistic view of clients so you can easily identify opportunities to account round or cross-sell. Epic Benefits provides unique Benefits-specific screens to capture general plan information, rates, coverages, eligibility criteria, stop loss and TPA information. Direct integration with Applied Benefits Designer™ provides access to custom form management and templates that beautifully present RFPs and plan summaries.

What Epic Benefits Offers Your Agency

- Benefit-specific screens to capture general plan information, rates, coverages, eligibility criteria, stop loss and TPA information
- Commission rate tiers, including flat-fees per risk
- Support for Fee-for-Service activity, including tracking and billing
- RFPs and plan summary comparisons created through plan/coverage detail export
- Insured detail import of census and election information

“Having our Benefits and Property & Casualty business in the same system creates a huge advantage. A large percentage of our business is from cross-selling to our customers.”

– Duane Ray, Vice President, Epic Insurance Solutions

Allows your agency to

- Stop spending time and money on multiple systems
- Gain a complete picture of each client and prospect with centralized data
- Identify cross- and upsell opportunities easily to block out competitors

Have Questions?

Call 800.999.5368

Visit appliedsystems.com