

How to Add a Package Policy in Applied Epic

This guide walks you through how to add a package policy in Applied Epic, from locating the client account to issuing the completed policy. You'll learn how to enter policy details, add multiple lines of business, remove placeholder entries, and confirm the final policy is active.

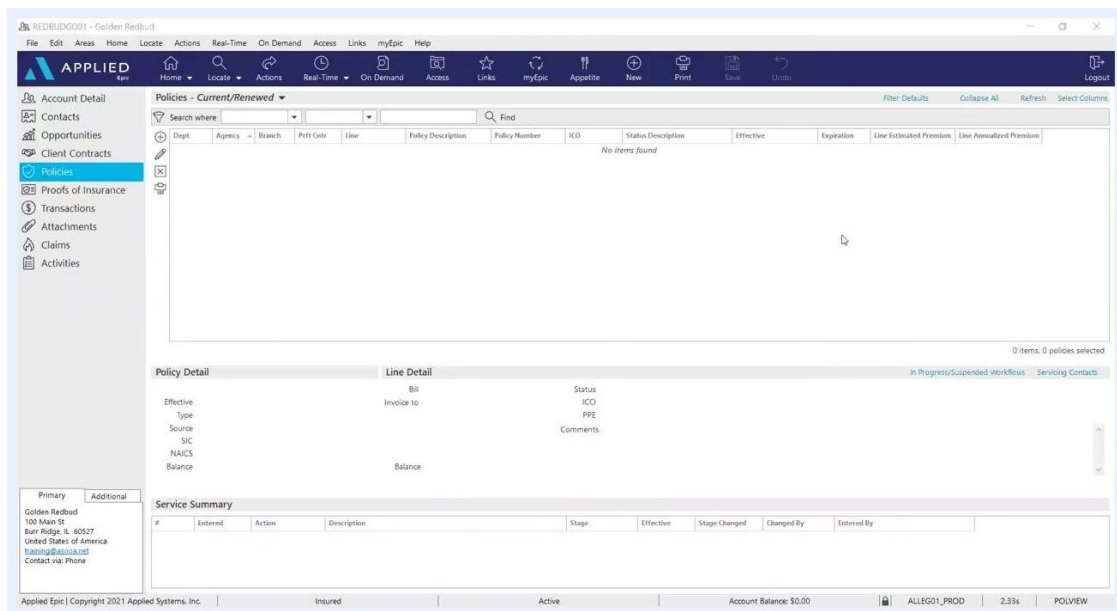
Prerequisites

- Access to Applied Epic with permissions to add and edit policies.
- The client account for which you want to add the package policy.
- Policy details on hand, including policy number, effective and expiration dates, issuing company, and premium amounts.

Navigating to the client account

1. Open the client account and access Policies

Open Applied Epic and go to the client account for which you want to add the package policy. In the left navigation pane, click **Policies**. The main Policies screen displays the current and renewed policies for the client.



Policies section open, showing no items found in the policy list. Left navigation highlights 'Policies'.

2. Start a new policy

Click the **plus sign (+)** or the **Add a Policy** button to begin entering a new policy.

Entering policy details

3. Select the policy line type

In the **Policy Detail** section, set the **Type** field. For a personal lines package policy, enter or select **PCK1**. For a commercial lines package policy, enter or select **CPKG**. You can optionally customize the **Description** field to clarify the package type.

The screenshot shows the 'Add a Policy' screen in the Applied Epic system. The interface is divided into two main sections: 'Policy Detail' and 'Lines of Business'. The 'Policy Detail' section includes fields for 'Type' (set to PCK1), 'Description', 'Effective' date, 'Expiration' date, 'Source', and 'Turn off policy download'. The 'Lines of Business' section includes fields for 'Line' (set to NEW), 'Status' (set to New Policy), 'Issuing location', 'Agency bill' (selected), 'Direct bill' (selected), 'Profit center' (set to PFC), 'Mandatory Profit Center', 'Issuing company', 'Premium payable' (set to CA), 'Payable contract', and 'Profit'. There are also sections for 'Line Commission' and 'Line Estimated Premium/Commission'. The bottom of the screen shows a status bar with 'Applied Epic | Copyright 2021 Applied Systems, Inc.', 'Insured', 'Active', 'Account Balance: \$0.00', and user information 'ALLEG01_PROD | 1.06s | POLADO'.

Add a Policy screen with Policy Detail and Lines of Business sections. The 'Type' field is set to PCK1, the Description field is editable, and other fields are ready for input.

4. Enter the policy number and dates

Enter the policy number in the **Policy #** field, then enter the **Effective Date** and **Expiration Date** for the policy. Fill in the **Source** field if applicable.

5. Verify the structure information

Review the **Structure** section on the right side of the screen. Confirm that the **Agency**, **Branch**, and **Department** fields accurately reflect your agency's information. If the **Department** (for example, Personal Lines or Commercial Lines) needs to be changed, manually select the correct department from the dropdown.

The screenshot displays the 'Policy Detail' screen in the Applied Epic system. The 'Structure' section is highlighted, showing the following fields:

- Agency: ASNOA
- Branch: Training
- Department: Personal Lines

The 'Policy Estimated Premium/Commission' section shows:

- Premium: [Empty]
- Commission: [Empty]

The 'Lines of Business' section shows:

- Line: PCK1
- Status: NEW
- Issuing location: IL
- Profit center: PCK1
- Profit center: PCK1
- Profit center: PCK1

The 'Line Commission' section shows:

- Use commission agreement: [Checked]
- Override commission agreement percentage/amount: [Empty]
- Agreement: [Empty]
- Type: %
- Percent: [Empty]
- Amount: [Empty]

The 'Mandatory Profit Center' dropdown is open, showing the following options:

Code	Name	Compliance
15TCH1	1st Choice Advantage Insurance Company, Inc.	Not Yet Determined
5 55T1	5 Star Programs	Not Yet Determined
AAA1N1	AAA Insurance Company - Arizona & Southern Indiana	Not Yet Determined
AAAMEM	AAA - Memberset Illinois, Northern Indiana, Ohio, Neb...	Not Yet Determined
ABAIN1	ABA Insurance Services, Inc.	Not Yet Determined
ABAIN2	Abacus Insurance Brokers Inc	Not Yet Determined
ABASE1	ABA Seguros	Not Yet Determined
ACCFU1	Accident Fund Insurance Company of America	Not Yet Determined
ACCIN1	ACCIDENT INSURANCE COMPANY	Not Yet Determined
ACCIN2	Access Insurance Agency, LLC	Not Yet Determined

Structure section highlighted with Agency, Branch, and Department fields. The Department dropdown is open, showing options such as Administrative, Commercial Lines, Life, and Personal Lines.

Completing the lines of business

6. Complete the initial line of business

In the **Lines of Business** section, set the **Line** field (for example, PCK1 for personal lines) and set the **Status** to **NEW**. Select the **Issuing Location** (for example, IL for Illinois), and complete other required fields such as **Profit Center**, **Issuing Company**, and **Premium Payable** as needed.

The screenshot displays the 'Policy Detail' and 'Lines of Business' sections of the REDBUDG001 - Golden Redbud application. The 'Policy Detail' section includes fields for Type (PCK1), Description (PCKG-PL), Effective date (5/6/2021), and Expiration date. The 'Lines of Business' section is partially filled with Line (PCK1), Status (NEW), Issuing location (IL), Profit center (PFC), Issuing company, Premium payable (CA), and Payable contract. The 'Line Commission' section shows a commission agreement type of '%'. The 'Line Estimated Premium/Commission' section has fields for Premium and Commission. The bottom status bar shows 'Applied Epic | Copyright 2021 Applied Systems, Inc. | Insured | Active | Account Balance: \$0.00 | ALLEG01_PROD | 0.16s | POLADD'.

Policy entry screen with PCK1 selected, description filled, policy number and dates ready for input, and the Lines of Business section partially filled.

7. Select the issuing company

In the **Issuing Company** field, click the dropdown and select the appropriate company. For this example, select **NATGEN – National General**.

The screenshot shows the 'Policy Detail' form in the Applied Epic system. The 'Issuing company' dropdown is open, showing a list of companies. 'NATGEN – National General' is highlighted and selected. The form also shows fields for Policy #, Effective date, Expiration date, and various tabs like 'Lines of Business' and 'Line Commission'.

Code	Name	Compliance
NATCA1	National Casualty Company	Not Yet Determined
NATF1	National Fire & Marine Insurance Company	Not Yet Determined
NATF2	National Fire Insurance Company of Hartford	Not Yet Determined
NATFLO	National Flood	Not Yet Determined
NATGEN	National General	Not Yet Determined
NATHA1	National Hangar	Not Yet Determined
NATHI1	National Indemnity Company	Not Yet Determined
NATHI2	National Insurance Company	Not Yet Determined
NATHL1	National Liability & Fire	Not Yet Determined
NATHL2	National Life Group	Not Yet Determined

Issuing Company dropdown open, with National General highlighted and selected.

8. Set the commission agreement (if applicable)

Check the **Use commission agreement** box if your agency uses commission agreements. It's acceptable if no percentage or commission value populates automatically at this stage.

9. Enter the premium amount

In the **Line Estimated Premium/Commission** section, enter the premium for this package. For this example, enter **600** in the **Premium** field.

The screenshot shows the 'Policy Detail' form in the Applied Epic system. The 'Policy Detail' section includes fields for Type (PKG-PL), Description (PKG-PL), Policy # (123321), Effective date (5/6/2021), and Expiration date (5/6/2022). The 'Structure' section shows Agency (ASNOA), Branch (TRA), and Department (PER). The 'Policy Estimated Premium/Commission' section has a 'Premium' field filled with 600. The 'Lines of Business' section shows a table of business lines with a dropdown menu open, listing various companies like National Casualty Company, National Fire & Marine Insurance Company, National Fire Insurance Company of Hartford, National Flood, National General, National Hangar, National Indemnity Company, National Insurance Company, National Liability & Fire, and National Life Group. The 'Line Commission' section has a 'Premium' field filled with 600. The bottom of the screen shows the 'Details' button and the 'Account Balance: \$0.00'.

Code	Name	Compliance
NATCA1	National Casualty Company	Not Yet Determined
NATF1	National Fire & Marine Insurance Company	Not Yet Determined
NATF2	National Fire Insurance Company of Hartford	Not Yet Determined
NATFLO	National Flood	Not Yet Determined
NATGEN	National General	Not Yet Determined
NATHA1	National Hangar	Not Yet Determined
NATIN1	National Indemnity Company	Not Yet Determined
NATIA2	National Insurance Company	Not Yet Determined
NATL1	National Liability & Fire	Not Yet Determined
NATL2	National Life Group	Not Yet Determined

Premium field filled with 600 under Line Estimated Premium/Commission. All other fields remain as previously entered.

10. Proceed to detail and close the activity

Click the **Detail** button at the bottom right to continue with the package policy format. If prompted with an activity window, review the details and click **Finish** to close the activity. If a confirmation dialog appears stating "Activity contains tasks that have not been completed. Do you wish to continue?", click **Yes** to proceed.

The screenshot shows the 'APPLIED' software interface with the 'Add an Activity' dialog box open. The 'Detail' tab is selected, displaying various fields for activity configuration. A confirmation dialog box is overlaid on top, asking 'Activity contains tasks that have not been completed. Do you wish to continue?' with 'Yes' and 'No' buttons. The 'Finish' button is highlighted in green at the bottom right of the 'Add an Activity' dialog.

Activity window open with the Finish button highlighted, and a confirmation dialog asking to close the activity with Yes selected.

11. Review the policy entry

After closing the activity, review the completed policy entry. The **Lines of Business** section now displays the new policy line (for example, PCK1) with the effective and expiration dates, issuing location, profit center, issuing company, and estimated premium (\$600.00).

The screenshot displays the 'Applied Epic' software interface. On the left is a navigation menu with options like 'Account Detail', 'Contacts', 'Opportunities', 'Client Contracts', 'Policies', 'Service/Billing', 'Proofs of Insurance', 'Transactions', 'Attachments', 'Claims', and 'Activities'. The 'Policies' section is expanded, showing a list of policies including 'PCK1 - 5/6/2022'. The main window shows the 'Lines of Business' section for a new policy line PCK1. The table at the top lists the policy line with columns for Line ID, Status, Description, Line Eff, Line Exp, Iss Loc, BIR, ICO, PPE, PPR Code, and Estimated Prem. The row for PCK1 shows a status of 'New Policy', effective date of 05/06/2021, expiration date of 05/06/2022, issuing location of IL, profit center of PFC, and an estimated premium of \$600.00. Below the table, the 'Line of Business' details are shown, including 'Line PCK1 - PCKG-PL', 'Status NEW - New Policy', 'Issuing location Illinois', 'Profit center PFC', 'Issuing company NATGEN', 'Premium payable CA', and 'Payable contract'. The 'Line Information' section includes fields for Line ID, Plan option name, Risks insured, and Total eligible. The 'Line Commission' section has a checkbox for 'Use commission agreement' and fields for Agreement, Type, Percent, and Amount. The 'Premium' section includes fields for Billed, Annualized, Estimated, and Estimated monthly, with a 'Download' button. The 'Commission' section includes fields for Billed, Annualized, Estimated, and Estimated monthly, with a 'Calculate' button. The bottom status bar shows 'Policy #: 123321', 'Coverages Effective: 5/6/2021 - 5/6/2022', 'Account Balance: \$0.00', and 'ALLEG01_PROD 1.90s \$BUNEDET'.

Lines of Business section showing the new policy line PCK1, effective/expiration dates, Illinois location, National General as issuing company, and a \$600.00 estimated premium.

Adding additional lines of business

12. Add the Auto line of business

In the **Add a Line of Business** window, set the following fields:

- **Line:** AUTO (Personal Automobile)
- **Status:** NEW (New Policy)
- **Issuing Location:** IL (Illinois)
- **Profit Center:** PFC (Mandatory Profit Center)
- **Issuing Company:** NATGEN (National General)

Check the **Use commission agreement** box.

The screenshot shows the 'Add a Line of Business' window in the Applied Epic system. The window is titled 'Add a Line of Business' and contains several sections. The 'Line' section has 'Line ID' set to 'PCK1' and 'Status' set to 'NEW'. The 'Line Information' section has 'Line ID' set to 'PCK1' and 'Status' set to 'NEW'. The 'Line Commission' section has 'Use commission agreement' checked. The 'Line Estimated Premium/Commission' section has 'Premium' and 'Commission' fields. The 'Mandatory Profit Center' section has 'Mandatory Profit Center' set to 'National General'. The 'Add' button is highlighted in green.

Add a Line of Business window with AUTO selected, the commission agreement box highlighted, and all required fields filled for Personal Automobile.

If the default commission agreement is not correct for this line of business, click the **Agreement** dropdown and select the appropriate agreement, such as "CA - Auto - New & Renew," "Personal Auto & RV - New & Renew," or "Premier Auto (when bundled w/Home) - New & Renew."

The screenshot shows the 'Add a Line of Business' window in the Applied Epic system. The window is titled 'Add a Line of Business' and contains several sections. The 'Line' section has 'Line ID' set to 'PCK1' and 'Status' set to 'NEW'. The 'Line Information' section has 'Line ID' set to 'PCK1' and 'Status' set to 'NEW'. The 'Line Commission' section has 'Use commission agreement' checked. The 'Line Estimated Premium/Commission' section has 'Premium' and 'Commission' fields. The 'Mandatory Profit Center' section has 'Mandatory Profit Center' set to 'National General'. The 'Add' button is highlighted in green.

Commission agreement dropdown open with multiple agreement options visible for selection.

In the **Line Estimated Premium/Commission** section, enter the premium amount (for example, \$200), then click **Add** to save this line and prepare to add the next one.

13. Add the Home line of business

Set the following fields:

- **Line:** HOME (Homeowners)
- **Status:** NEW (New Policy)
- **Issuing Location:** IL (Illinois)
- **Profit Center:** PFC
- **Issuing Company:** NATGEN

Check the **Use commission agreement** box, enter the premium amount (for example, \$200), and click **Add** to save this line.

The screenshot shows the 'Add a Line of Business' window in the Applied Epic system. The window is titled 'Add a Line of Business' and is open over the 'Lines of Business' section. The 'Line' dropdown is set to 'HOME' (Homeowners), 'Status' is 'NEW' (New Policy), 'Issuing location' is 'IL' (Illinois), 'Profit center' is 'PFC', and 'Issuing company' is 'NATGEN'. The 'Use commission agreement' checkbox is checked. The 'Line Estimated Premium/Commission' section shows 'Premium' entered as 200. The 'Add' button is highlighted in green.

Add a Line of Business window with HOME selected, commission agreement checked, and the premium entered as 200.

14. Add the Umbrella line of business

Set the following fields:

- **Line:** PUMB (Umbrella - Personal Lines)
- **Status:** NEW (New Policy)
- **Issuing Location:** IL (Illinois)
- **Profit Center:** PFC
- **Issuing Company:** NATGEN

Generated with docsie.io

Check the **Use commission agreement** box and enter the premium amount (for example, \$200). Click **Finish** after all desired lines of business have been added.

The screenshot shows the 'Add a Line of Business' window in the Applied Epic software. The window is titled 'Add a Line of Business' and contains several sections. The 'Line' section has 'PUMB' selected in the dropdown, with 'Umbrella - Personal Lines' as the description. The 'Status' is 'NEW' and 'New Policy'. The 'Issuing location' is 'IL' and 'Illinois'. The 'Tax option' is 'Not Applicable'. The 'Line Information' section has 'Line ID' and 'Plan option name' fields. The 'Line Commission' section has 'Use commission agreement' checked. The 'Line Estimated Premium/Commission' section has 'Premium' and 'Commission' fields. The 'Premium' section has 'Billed', 'Annualized', 'Estimated', and 'Estimated monthly' fields. The 'Add' button is highlighted in green. The background shows the 'Lines of Business' table with columns for Line, Status, Description, Use Eff, Use Exp, Iss Loc, BIR, ECO, PPE, PPR Code, and Estimated Premium.

Add a Line of Business window with PUMB (Umbrella - Personal Lines) selected, commission agreement checked, and the premium field ready for entry.

Finalizing the package policy

15. Remove the initial package line (PCK1)

Before finalizing, delete the initial PCK1 line of business. In the **Lines of Business** list, highlight the **PCK1** entry and click **Delete**. When prompted with "Are you sure you wish to delete this line?", click **Yes** to confirm.

The screenshot displays the 'Applied Epic' software interface. On the left, a sidebar contains navigation options: Account Detail, Contacts, Opportunities, Client Contracts, Policies (selected), Servicing/Billing, Line, Personal AP, PCKG-PL, Personal Automobile, Homeowners, Umbrella- Personal Lines, Proofs of Insurance, Transactions, Attachments, Claims, and Activities. The main window shows the 'Lines of Business' table with columns: Line, Status Description, Use Eff, Use Exp, Ins Loc, BB, ICD, PPE, Pftb Ctr, and Estimated Prem. The table lists four lines: PCK1 (New Policy, 05/06/2021 to 05/06/2022, IL, D, NATGEN, NATGEN, PFC, \$600.00), AUTO (New Policy, 05/06/2021 to 05/06/2022, IL, D, NATGEN, NATGEN, PFC, \$200.00), HOME (New Policy, 05/06/2021 to 05/06/2022, IL, D, NATGEN, NATGEN, PFC, \$200.00), and PLUMB (New Policy, 05/06/2021 to 05/06/2022, IL, D, NATGEN, NATGEN, PFC, \$200.00). The PCK1 line is highlighted. Below the table, the 'Line of Business' form for 'PCK1 - PCKG-PL' is visible, showing fields for Status (NEW), Issuing location (Illinois), Premium payable (Agency bill), and Plan option name. A 'Delete Policy/Line' dialog box is open, asking 'Are you sure you wish to delete this line?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted. The bottom of the screen shows the policy number 123321, coverages effective from 5/6/2021 to 5/6/2022, and account balance of \$0.00.

Delete Policy/Line confirmation dialog with Yes selected, and PCK1 highlighted for deletion.

16. Review the final set of lines of business

Confirm that only the intended lines of business remain (Auto, Home, Umbrella), each with the correct details and premium amounts (for example, \$200 each). If you are adding policies for several producers, ensure the correct **PR BR Commission agreements** are set for each producer on the back end. If your system is already defaulted and set up, no further action is needed.

Line	Status	Description	Issue Eff	Issue Exp	Ins Loc	B/B	K/O	P/P	P/B	C/P	Estimated Prem
AUTO	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC		\$200.00
HOME	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC		\$200.00
PUMB	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC		\$200.00

Line of Business

Line: **AUTO - Personal Automobile** Profit center: **PFC** Mandatory Profit Center: **National General**

Status: **NEW** New Policy Issuing company: **NATGEN** Issuing location: **Illinois** Premium payable: **CA** Payable contract: **NATGEN**

☐ Agency bill ☒ Direct bill

Line Information

Line ID: Plan option name:

Risks insured: Description:

Total eligible: Description:

Line Commission

☒ Use commission agreement Agreement: **CA - Auto - New & Renew** Agreement Details:

☐ Override commission agreement percentage/amount

Type: **%** Percent: **10.0000%** Amount:

Premium

Billed: Annualized: Downloaded:

Estimated: **\$200.00** Estimated monthly: Calculate:

Commission

Billed: Annualized: Estimated: **\$20.00** Estimated monthly: Calculate:

How is this calculated?

Policy #: 123321 Account Balance: \$0.00 Policy Balance: \$0.00 Coverages Effective: 5/6/2021 - 5/6/2022

Lines of Business section showing only AUTO, HOME, and PUMB lines, each with a \$200 premium, and commission agreement details visible.

Issuing or not issuing the policy

17. Close the current policy window

When you have completed all necessary policy entry and edits, locate and click the "X" on the left-hand side of the policy window to exit.

The screenshot displays the Applied Epic software interface for policy entry. The left-hand navigation panel is active, showing 'Policies' and 'PCK1 - 5/6/2022'. The main content area is titled 'Lines of Business' and contains a table with three rows of policy data. Below the table, there are several sections for policy details, including 'Line Information', 'Line Commission', and 'Premium'. The 'Line Information' section shows 'Line ID' and 'Plan option name'. The 'Line Commission' section shows 'Use commission agreement' and 'Agreement Details'. The 'Premium' section shows 'Billed', 'Annualized', 'Estimated', and 'Estimated monthly' values. The bottom of the screen displays the policy number '123321' and the account balance '\$0.00'.

Line	Status Description	Line Eff	Line Exp	Is Loc	BB	ICD	PPE	Prft Ctr	Estimated Prem
AUTO	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
HOME	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
PUMB	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00

Line Information

Line ID: Plan option name:

Risks Insured: Description:

Total eligible: Description:

Line Commission

☒ Use commission agreement

Agreement: Agreement Details:

Override commission agreement percentage/amount:

Type: Percent: Amount:

Premium

Billed: Annualized: Estimated: Estimated monthly:

Download: Calculate:

Commission: Annualized: Estimated: Estimated monthly:

How is this calculated?:

Policy #: 123321 Account Balance: \$0.00 Policy Balance: \$0.00 Coverages Effective: 5/6/2021 - 5/6/2022

The Applied Epic interface showing the policy entry screen with various fields filled, including policy status, issuing company, premium, and commission details. The navigation panel on the left highlights 'Policies' and the active policy.

If the insurance carrier does not provide automatic downloads, you'll need to manually issue the policy. A dialog titled "In Process Policy" appears. Confirm that you have completed policy editing, select "Yes, perform action:", choose the appropriate action from the dropdown menu, and click the green **Finish** button to proceed.

The screenshot displays the Applied Epic software interface. The main window shows the 'Lines of Business' section with a table of policies. A dialog box titled 'In Process Policy' is open, asking if the policy editing is complete. The dialog has a dropdown menu with 'Yes, perform action:' selected, and a green 'Finish' button is visible. The background interface includes a sidebar with navigation options like 'Account Detail', 'Contacts', 'Opportunities', 'Client Contracts', 'Policies', 'Servicing/Billing', 'Proofs of Insurance', 'Transactions', 'Attachments', 'Claims', and 'Activities'. The top menu bar includes 'File', 'Edit', 'Areas', 'Home', 'Locate', 'Actions', 'Real-Time', 'On Demand', 'Access', 'Links', 'myEpic', and 'Help'. The bottom status bar shows 'Applied Epic | Copyright 2021 Applied Systems, Inc.' and other system information.

Line	Status	Description	Line Eff	Line Exp	Iss Loc	BB	ICD	PPE	Prft Cntr	Estimated Prem
AUTO	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
HOME	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
PUMB	New Policy		05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00

In Process Policy

Policy # 123321
Type PCKG-PL
Term 5/6/2021 to 5/6/2022

This policy's stage is "In Process". Have you completed policy editing?

☐ No, leave "In Process"

☒ Yes, perform action: [dropdown menu]

Finish Cancel

A dialog box titled 'In Process Policy' is open over the Applied Epic policy entry screen. It asks whether policy editing is complete, with options to leave it 'In Process' or perform an action. 'Yes, perform action:' is selected, and the Finish button is visible.

18. Close out any open activities

If prompted, a window titled "Issue / Not Issue Policy" appears. Verify the policy number (for example, 123321), effective and expiration dates (5/6/2021 to 5/6/2022), and line details. Ensure the issuing company and premium payable fields are set to "NATGEN National General," and confirm the status is "NEW New Policy." Click the green **Finish** button to finalize and close the activity.

The screenshot shows the 'Issue / Not Issue Policy' dialog box in the Applied Epic software. The dialog box is titled 'Issue / Not Issue Policy' and contains the following information:

- Policy number: 123321
- Effective date: 5/6/2021
- Expiration date: 5/6/2022
- Line details table:

Line	Line Description	Status Description	BB	ICO	Pay	PFE	Policy Description	PFE Cnty
AUTO	Personal Auto...	NEW - New Policy	D	NATGEN	CA	NATGEN	PKG-PL	PFC
HOME	Homeowners	NEW - New Policy	D	NATGEN	CA	NATGEN	PKG-PL	PFC
PUMB	Umbrella - Person...	NEW - New Policy	D	NATGEN	CA	NATGEN	PKG-PL	PFC

The dialog box also includes fields for 'Issuing company' (NATGEN National General), 'Premium payable' (NATGEN National General), 'Payable contract' (NATGEN National General), and 'Status' (NEW New Policy). A green 'Finish' button is highlighted at the bottom right of the dialog box.

A dialog box titled 'Issue / Not Issue Policy' is open, showing the policy number, effective and expiration dates, and line details for multiple lines. The issuing company and premium payable are set to 'NATGEN National General,' and the Finish button is highlighted.

Confirming the policy was added

19. Review the updated policy list

The "Policies - Current/Renewed" screen displays all current policies. Verify that your new policy (for example, PCK1, policy number 123321, effective 5/6/2021 to 5/6/2022) appears in the list with the correct details and premiums. Check the "Policy Detail" and "Line Detail" sections for confirmation.

The screenshot displays the Applied Epic software interface. On the left is a navigation menu with options like Account Detail, Contacts, Opportunities, Client Contracts, Policies, and Proofs of Insurance. The main area shows a 'Lines of Business' table with columns for Line, Status Description, Use Eff, Use Exp, Iss Loc, RIB, ICO, PPE, PFT Cate, and Estimated Prem. A table below it lists three lines: AUTO (Personal Auto), HOME (Homeowners), and PLMB (Umbrella-Personal Lines). An 'Issue / Not Issue Policy' dialog box is open, showing details for Policy number 123321, effective 5/6/2021 to 5/6/2022. The dialog includes a 'Line Detail' table with columns for Issue/Not Issue, Line, Line Description, Status Description, RIB, ICO, Pay, PPE, Policy Description, and PFT Cate. It also has fields for Issuing company (NATGEN), Premium payable (CA), Payable contract (NATGEN), and Status (NEW - New Policy). At the bottom, there are 'Premium' fields for Annualized (\$200.00), Estimated (\$20.00), and Estimated monthly (\$20.00), along with a 'Calculate' button. The footer shows 'Policy # 123321', 'Coverages Effective: 5/6/2021 - 5/6/2022', and 'Account Balance: \$0.00'.

Line	Status Description	Use Eff	Use Exp	Iss Loc	RIB	ICO	PPE	PFT Cate	Estimated Prem
AUTO	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
HOME	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00
PLMB	New Policy	05/06/2021	05/06/2022	IL	D	NATGEN	NATGEN	PFC	\$200.00

Issue/Not Issue	Line	Line Description	Status Description	RIB	ICO	Pay	PPE	Policy Description	PFT Cate
Issue	AUTO	Personal Auto...	NEW - New Policy	D	NATGEN	CA	NATGEN	PCKG-PL	PFC
Issue	HOME	Homeowners	NEW - New Policy	D	NATGEN	CA	NATGEN	PCKG-PL	PFC
Issue	PLMB	Umbrella-Person...	NEW - New Policy	D	NATGEN	CA	NATGEN	PCKG-PL	PFC

The Applied Epic 'Policies - Current/Renewed' screen showing a list of policies, including the newly added package policy with details such as line, policy number, effective and expiration dates, and premiums.

20. Verify the policy is active

Double-check the policy details, including effective dates, type, and agency balance. Confirm that the policy status is "Active" and the account balance is \$0.00.

The screenshot shows the Applied Epic interface with the 'Policies - Current/Renewed' screen open. A policy line for 'PCK1 - 5/6/2022' is selected, showing a status of 'NEW'. The 'Issue / Not Issue Policy' dialog box is open, displaying details for Policy number 123321, effective date 5/6/2021, and expiration date 5/6/2022. The dialog includes fields for Line, Line Description, Status, and various policy details. The 'Finish' button is highlighted in green.

Line	Line Description	Status	Line Exp	Line Eff	Is Loc	BB	ICD	PPE	Pftb Cate	Estimated Prem
AUTO	New Policy	NEW	05/06/2022	05/06/2021	IL	D	NATGEN	NATGEN	PFC	\$200.00
HOME	New Policy	NEW	05/06/2022	05/06/2021	IL	D	NATGEN	NATGEN	PFC	\$200.00
PUMB	New Policy	NEW	05/06/2022	05/06/2021	IL	D	NATGEN	NATGEN	PFC	\$200.00

Policy number: 123321 Effective: 5/6/2021 Expiration: 5/6/2022

Line: AUTO - Personal Automobile

Line Description: NEW - New Policy

Status: NEW

Issue / Not Issue Policy

Issue: AUTO Personal Automobile NEW - New Policy D NATGEN CA NATGEN PCKG-PL PFC

Issue: HOME Homeowners NEW - New Policy D NATGEN CA NATGEN PCKG-PL PFC

Issue: PUMB Umbrella-Person NEW - New Policy D NATGEN CA NATGEN PCKG-PL PFC

Issuing company: NATGEN National General

Premium payable: CA National General

Payable contract: NATGEN

Status: NEW New Policy

Finish Cancel

0.62s | ISSUAPP

How is this calculated?

Policy # 123321

Coverages Effective: 5/6/2021 - 5/6/2022

Applied Epic | Copyright 2021 Applied Systems, Inc. Insured Active Account Balance: \$0.00 Policy Balance: \$0.00 ALLEG01_PROD SBLNET

The Applied Epic 'Policies - Current/Renewed' screen remains open, showing the policy list and details for the selected policy, confirming successful addition.

Summary

You've now learned how to add a package policy in Applied Epic, including setting up the initial policy line, adding Auto, Home, and Umbrella lines of business, removing the placeholder PCK1 entry, and issuing the policy. Once the policy appears in the "Policies - Current/Renewed" screen with an "Active" status and a \$0.00 balance, the package policy is successfully added and ready for use.