Applied Client Network New Jersey, Eastern Pennsylvania and Tri State Epic Are Pleased to Announce a Joint Summit!

When: **April 7-8, 2016**

Where: Sheraton Atlantic City Convention Center Hotel, 2 Convention Blvd, Atlantic City, NJ 08401

What: Two days jam packed with Education Sessions. Seven sessions for each track.

Who: Graham Blundell, Master Presenter
Todd Arnold, AB Solutions, Master Presenter
Jackie Glick, Master Presenter
Marcia Priest, AB Solutions, Master Presenter

How Much: $219 member 2 day
$244 non-member 2 day
$119 member 1 day
$135 non-member 1 day

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Thursday, April 7		
8:00 - 9:00	Registration	
	TAM Track	Epic Track
9:00 - 10:30	Implementing Checks and Balances in Accounting with Applied TAM	Key Utilization and Configuration Decisions
10:30 - 10:45	Coffee Break	
10:45 - 12:15	Advanced Techniques for Form Letters and Proposals	Reviewing and Designing your Workflow
12:15 - 1:15	Lunch	
1:15 - 2:45	Managing & Organizing Attachments in Applied TAM	Auditing Your Workflows & Procedures
2:45 - 3:15	Coffee break	
3:15 - 4:45	E & O Prevention in Creating Certificates of Insurance in TAM	Beyond the Basics with Applied Epic Reporting

Friday, April 8		
8:00 - 9:00	**Breakfast** - round table discussions, come with your questions we'll get you your answers.	
	TAM Track	Epic Track
9:00 - 10:30	Using Excel to Audit Your TAM Transactions and Billing Screens	Epic 2016 Overview
10:30 - 10:45	Coffee Break	
10:45 - 12:00	Microsoft® Word® - Creating a Form	Tips + Tricks
12:00 - 1:15	Lunch – with Vendor Demos, General meeting	
1:15 - 2:45	Applied TAM Tips and Tricks	Users helping Users & Bring your questions

Epic

Overview of Workflow Design

Reviewing and Designing your Workflow

Now that we have reviewed configuration decisions, we will move on to a discussion on how to design a workflow. What should you consider, how do you begin, how to document that workflow (Workflow Manual, Procedures). Real world examples and discussion from instructors who have spent years helping agencies design and implement workflows. Additionally, we will discuss the differences between workflows and procedures. This session will be helpful to ANYONE in agency who has been frustrated by a process and would like to recommend change and improvement into their workplaces.

Auditing Your Workflows & Procedures

A formal Quality Assurance program is important to any agency that wants to maximize their utilization of the system. Unfortunately, actually conducting such audits on a regular basis often proves difficult, time consuming, and sometimes just downright painful. This session will discuss ways to implement everything from a basic audit process to a much more detailed Quality Assurance program .

E09-1040 Beyond the Basics with Applied Epic Reporting

Target Audience: Trainer, Operations, IT Manager/Systems Coordinator, CSR
Level: Basic Level
Description: Discover how to take a basic layout and customize it to fit your agencies' needs. We will take a closer look at the insert options under report layouts. You will learn how to make reports presentable to share with your staff, clients and carrier partners.
Learning Outcomes:
• Learn how to brand your reports and customize them to meet your agency standard. • Demonstrate how to use all the different options under report layouts. •Explain how to add Totals and Sub-totals to any report

Tips + Tricks

Bring your favorite tip, trick or shortcut to share with other Epic Users. In addition, we will be reviewing shortcuts and tips to make your Epic life easier. This session will make you popular with your fellow users when you return with easy/quick tips that can save them time.

Epic 2016 Overview

Epic 2016 is a game changer is so many ways. We will go through enhancements and features of the latest Epic Version. If you are a 2016 User – be prepared to share what you have found helpful and intriguing. What has your agency quickly adopted as part of the upgrade, and what are considering working on in the future.

QUESTIONS – Users Helping Users Session

Ask your fellow users what questions they may have about Epic, and need help solving or understanding. Bring along those questions and let's see how we all can help to answer. There are no "stupid" questions, and we can broaden the discussion to go beyond just Epic into other hot topic Agency Technology questions. You will find that as a group, we Epic Users, love sharing our knowledge and helping others solve problems.

Key Utilization Sessions

E10-1002 Key Utilization and Configuration Decisions in Applied Epic

Target Audience: Trainer, Operations, IT Manager/Systems Coordinator
Level: Basic Level
Description: In order to take advantage of Applied Epic's robust and powerful platform, it is necessary for the agency to understand the interaction between account-level features and functionality, configuration choices, reporting, and workflow "philosophy" choices will all interact
Learning Outcomes:
• Recognize the importance of establishing overarching "philosophies" on how workflows will be approached in the Applied Epic system
• Realize how choices in different configuration areas can either have a synergistic or productivity-draining impact upon each other. •
Realize how account level functionality should be reviewed and factored into configuration decisions.

TAM

Managing & Organizing Attachments in Applied TAM

Target Audience: IT Manager/Systems Coordinator, Administrative
Level: Basic Level
Description: The key to effective documentation is the ability to find it. This session will help agencies identify the best layout for attachment categories, subcategories and description when working within the Agency Management system.

T11-2020 E & O Prevention in Creating Certificates of Insurance in TAM

Target Audience: Trainer, Producer, Principal/Owner, CSR
Level: Intermediate Level
Description: For any size account, demands are made to our commercial CSR staff to issue Certificates of Insurance with special language and changes. Are we allowed to make these changes to the COI form and what could be the implications of those actions? What obligations do you really have to these Certificate Holders? Find out if you are putting your agency in a potential E&O loss situation.
Learning Outcomes: • Examine and understand the TAM Certificate Setup area. •Review methods for proper completion of Certificates. •Utilize procedures for compliance with state laws and E&O prevention.

M03-2000 Microsoft® Word® - Creating a Form

Target Audience: Trainer, Producer, Principal/Owner, Operations, IT Manager/Systems Coordinator, CSR
Level: Advanced Level
Description: Gain an understanding of the two methods you can use to create a form in Applied TAM form letters or in Applied Epic templates. Create a company-specific form, bond form or other document that is prefilled with client data from your database.
Learning Outcomes: •Use the information in your database to prefill non-TAM/Epic documents such as company specific applications and bond forms. •Make your staff more productive by eliminating re-keying of information.

T01-2020 Using Excel to Audit Your TAM Transactions and Billing Screens

Target Audience: Accountant/Bookkeeper, Operations
Level: Intermediate
Description: This session will show how to use Excel to check your billing screens each month to be sure they are as accurate as possible. We will also run a search of transactions to check them before the month is posted so any errors can be caught in a timely manner.
Learning Outcomes:
• Identify what information is important to your agency.
• Demonstrate how to use filters in Excel to find the discrepancies in billing screens and transactions.
• Examine and decide how to correct the errors found.

T11-1110 Applied TAM Tips and Tricks

Target Audience: CSR, Operations, Administrative
Level: Intermediate
Description: This session will cover various items to turn on for efficient utilization of the system as well as making your users more effective. It will give you ideas on how to organize and how to get certain features enabled.
Learning Outcomes: • Understand what various buttons accomplish in the system •Know how to set up your system to be efficient •Discover effective workflow shortcuts

Applied TAM Financial Reports Checks & Balances

T01-2100 Implementing Checks and Balances in Accounting with Applied TAM

Target Audience: Principal/Owner, Operations, Accountant/Bookkeeper
Level: Intermediate Level
Description: A prudent, well thought out system of checks and balances offers many benefits to your agency that will be discussed during this session. Learn about various checks and balances and receive actionable thoughts on how to set several of them up.
Learning Outcomes:
• Discuss the different types of checks and balances that should be in place in your agency, primarily surrounding accounting • Implement the different methods and capabilities Applied TAM has to help ensure your producers are paid the correct commission

T10-3010 Advanced Techniques for Form Letters and Proposals

Target Audience: CSR, IT Manager/Systems Coordinator, Operations
Level: Advanced
Description: In this very advanced session, you will discover how to work with headers/footers, section breaks, pull from multiple applications, insert various objects, work with tables and math functions, macros, drawing objects, linking and embedding, and more. You will need a good working knowledge of Word to take your formletters and proposals to this next level as this session will move quickly.
Learning Outcomes:• Discover how to insert pictures and link to other documents in proposals. • Identify how to use Word's math functions to automatically total an equipment schedule or a premium summary, as well as the possibilities and limitations for pulling data from multiple applications into a single page. • Demonstrate the knowledge you need to make your proposals more professional and easier for your CSRs/Account Managers to create.