



REAL-TIME CONFIGURATION AND USAGE

Real-Time provides an efficient workflow for the transfer of data from Applied TAM or Epic to carrier partners/vendors and back.

APPLIED EPIC REAL-TIME CONFIGURATION AND USAGE



RUNNING REAL-TIME

Once Real-Time has been configured and updated, use the following steps to run a Real-Time quoting session.

1. Enter a new client or locate an existing client, and enter application data. After application data has been entered, highlight the policy and click the **Real-Time** button.

Note: A policy containing at least the minimum required information (Type, Description, Effective and Expiration Date, Line and Status codes, and Agency/Branch information) must exist on the selected account in order to launch Real-Time.

Line	Status Description	Effective	Expiration	Policy Number	Bill	ICO	Policy Description
HOME	New Policy	06/14/2013	06/14/2014	H076376821	A	CHUB81	Homeowners
AUTO	New Policy	07/01/2013	07/01/2014	AU94389420	A	HAN000	Personal Automobile

Policy Detail Multi-Carrier Schedule Line Detail

Prospective Bill Agency Status NEW - New Policy

2. The Real-Time interface launches.



Home



Locate



Actions



Real-Time



On Demand



Access



Links



myEpic



New



Print



Save



Undo



Logout

Account Detail

Contacts

Opportunities

Client Contracts

Policies

Proofs of Insurance

Transactions

Attachments

Claims

Activities

Policies - All Except Marketed

Sort Descending Select Columns

Search where Find

Line	Status Description	Effective	Expiration	Policy Estimated Pre...	Policy Number	Policy Annualized Pre...	Bill	Policy Billed Pre...	ICO	Policy Description	Marketed	PPE Type	Pay Contr
HOME	Renewal	01/30/2011	01/30/2012	\$2,200.00	HO43567201	\$2,200.00	D	\$2,200.00	TRACA1	Homeowners		CA	
AUTO	New Policy	06/05/2014	06/05/2015	\$1,464.74	TBD	\$1,464.74	A		ALLIN1	Personal Automobile		CA	Default
AUTO	New Policy	06/06/2014	06/06/2015	\$1,388.84	TBD	\$1,388.84	D			Personal Automobile		CA	
AUTO	Renewal	06/05/2015	06/05/2016	\$1,464.74	TBD		A		ALLIN1	Personal Automobile		CA	Default

Policy Detail

Line Detail

In Progress/Suspended Workflows Servicing Contacts

Prospective

Effective 6/6/2014 - 6/6/2015

Type AUTO - Personal Automobile

Source Competitor - Murphy Insurance

SIC

NAICS

Balance Agency - \$0.00

Bill

Direct

Invoice to Client - Michael Daniels

726 Beech Dr

Schaumburg, IL 60193

Status NEW - New Policy

ICO

PPE

Comments

Service Summary

#	Entered	Action	Description	Stage	Effective	Stage Changed	Changed By	Entered By
2	06/06/2014	Endorse/Revi...	Accepted Allied Quote	In Process	06/06/2014			Jordan Tournay
1	06/06/2014	New	Personal Automobile	Submitted	06/06/2014	06/06/2014	Jordan Tournay	Jordan Tournay

Primary

Additional

Mr. Michael A Daniels
726 Beech Dr
Schaumburg, IL 60193
United States of America
(847) 352-6637
michaelandem2005@gmail.com



Status Detail

Welcome to Epic Real-Time...

Available Carriers

Company Code ▲	Product Name	Accepts Attachments
<input checked="" type="checkbox"/> ALLIN1	Allied Insurance - Personal Auto - Epic	No
<input type="checkbox"/> EMCIN1	EMC Insurance Personal Auto RTR - TES...	No
<input type="checkbox"/> HARIN1	Osborne Insurance / Auto Test	No
<input checked="" type="checkbox"/> HARIN1	Hartford Quote to Issue Auto	No
<input type="checkbox"/> HARIN1	Riley Insurance / Auto	No
<input checked="" type="checkbox"/> PROCA1	Progressive Auto Quote - Epic	No

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Policy/Line Type	Policy Number	Effective Date	Expiration Date	ICO
HOME	HO43567201	01/30/2011	01/30/2012	TRACA1
AUTO	TBD	06/05/2014	06/05/2015	ALLIN1
AUTO	TBD	06/06/2014	06/06/2015	
AUTO	TBD	06/05/2015	06/05/2016	ALLIN1

APPLIED EPIC REAL-TIME CONFIGURATION AND USAGE



HERSEY/001 - John Hersey

File Help

Customer Detail	Status Detail
Type: Insured Lookup code: HERSEY001 Account name: John Hersey Address: 755 N Adams St Mendota, IL 60950	Welcome to Epic Real-Time...

Commands	Available Carriers																								
<div>Polices Claims Auto</div> <div>Command Options</div> <div>Evaluation Dates From Details Hold Ctrl key to select multiple</div> <div>Polices - Current/Re</div> <div>Search where</div> <div>Policy/Line Type Policy# Reverse Alerts</div>	<table border="1"><thead><tr><th>Company Code</th><th>Product Name</th><th>Accepts Attachments</th></tr></thead><tbody><tr><td><input type="checkbox"/> CHUBB1</td><td>Chubb Insurance Company / Auto</td><td>No</td></tr><tr><td><input checked="" type="checkbox"/> HAN000</td><td>Hanover Insurance Company / Auto</td><td>Yes</td></tr></tbody></table> <div>Find</div> <table border="1"><thead><tr><th>Policy/Line Type</th><th>Policy#</th><th>Effective Date</th><th>Expiration Date</th><th>ICD</th></tr></thead><tbody><tr><td>AUTO</td><td>A094386420</td><td>07/01/2013</td><td>07/01/2014</td><td>HAN000</td></tr><tr><td>HOTEL</td><td>H076370821</td><td>06/14/2013</td><td>06/14/2014</td><td>CHUBB1</td></tr></tbody></table>	Company Code	Product Name	Accepts Attachments	<input type="checkbox"/> CHUBB1	Chubb Insurance Company / Auto	No	<input checked="" type="checkbox"/> HAN000	Hanover Insurance Company / Auto	Yes	Policy/Line Type	Policy#	Effective Date	Expiration Date	ICD	AUTO	A094386420	07/01/2013	07/01/2014	HAN000	HOTEL	H076370821	06/14/2013	06/14/2014	CHUBB1
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3. Select an option from the *Command* dropdown menu. Not all options will appear for all agencies, as the command options are limited based on the carriers available for the agency.

File Help

Customer Detail

Type Insured
Lookup code **DANIELMI01**
Account name **Michael & Emily Daniels**
Address 726 Beech Dr
Schaumburg, IL 60193

Status Detail

(3) Transaction results returned...
(2) Sending request to server...
(1) Building request

Commands

☒ Policies ☐ Claims Rate

Command Options

Evaluation Dates: From 2/1/2016 To 2/1/2016

Details

Hold Ctrl key to select multiple lines on a single policy.

Structure

Agency **INS - Insurance Services Inc.**
Branch **OAK - Insurance Services - Oak Brook**
Department **PL - Personal Lines**
Prft Cntr **PL-S - Personal Lines - Small**

Policies - All Except Marketed

Search where

Policy/Line Type	Policy Number
HOME	HO43567201
AUTO	TBD
AUTO	TBD
AUTO	TBD

Real-Time Transactions Results

Welcome to the Real Time...

Companies

Company	Company Line	Type	Total Premium	Package Premium
Allied Insurance - Personal Auto - Epic		WP_USAuto	\$1,294.80	
Hartford Quote to Issue Auto		WP_USAuto		
Progressive Auto Quote - Epic		WP_USAuto		

Coverage/Premiums

Comments

Additional Info

Attachments (1)

Status

Unit	Coverage	Limit	Deductible	Premium
Veh 2007 BMW 328i	VFTP			\$667.95
Veh 2007 BMW 328i	BI	250000 500000		\$183.65
Veh 2007 BMW 328i	PD	250000		\$106.59
Veh 2007 BMW 328i	COLL		500	\$274.51
Veh 2007 BMW 328i	COMP		500	\$77.97
Veh 2007 BMW 328i	MEDPM	5000		\$25.23
Veh 2009 Honda Civic	VFTP			\$581.65
Veh 2009 Honda Civic	BI	250000 500000		\$180.17
Veh 2009 Honda Civic	PD	250000		\$122.31
Veh 2009 Honda Civic	COLL		500	\$203.83
Veh 2009 Honda Civic	COMP		500	\$38.22
Veh 2009 Honda Civic	MEDPM	5000		\$37.12

Accept

Requote

Issue

Cancel

1.61s | RTRESULT

Go

Cancel

APPLIED EPIC REAL-TIME CONFIGURATION AND USAGE



Available Carriers			Attachments
Company Code	Product Name	Accepts Attachments	
<input type="checkbox"/> CHUBB	Chubb Insurance Company / Auto	No	
<input checked="" type="checkbox"/> HAN000	Hanover Insurance Company / Auto	Yes	

1. To attach files to a Real-Time transaction, make sure the selected carrier accepts attachments, and click the **Attachments** link label to bring up the *Attachments* screen.
2. The view filter defaults to all attachments associated to the account. If desired, change the view filter to view attachments from the past three or six months.
3. Attachments associated to the account/policy populate in the *Available Attachments* list. Highlight the attachment to send and click on the **down arrow** button to move it to the *Selected Attachments* list.
Note: To move all attachments between the *Available Attachments* and *Selected Attachments* lists, use the double up and down arrow buttons.

The *Add Existing File*, *Add Email*, and *Preview* buttons allow files to be attached from a workstation, emails to be attached from an email account, and selected attachments to be previewed, respectively.

The screenshot shows the 'Attachments' window. At the top, there's a tab 'Available Attachments - All' with a 'Refresh' button. Below it is a table with columns: Description, Type, Attached, and File Size (KB). The table contains two rows: 'Veh-List.docx' (Type: .docx, File Size: 13) and 'Business_Continuity_plan.docx' (Type: .docx, Attached: 3/8/2012, File Size: 14). Below the table are four arrow buttons (down, up, double down, double up) and three buttons: 'Add Existing File', 'Add Email', and 'Preview'. Below these is a section titled 'Selected Attachments' with a table that has columns: Description, Type, and File Size (KB). The table is currently empty. At the bottom, there's a 'File size' indicator showing '0 KB' and '(2.5 MB max)', and 'Finish' and 'Cancel' buttons. The user ID 'WYUPATTAC' is visible in the bottom right corner.

File Help

Customer Detail

Type Insured
Lookup code **DANIELMI01**
Account name **Michael & Emily Daniels**
Address 726 Beech Dr
Schaumburg, IL 60193

Status Detail

(3) Transaction results returned...
(2) Sending request to server...
(1) Building request
Welcome to Epic Real-Time...

Commands

☒ Policies ☐ Claims Rate

Command Options

Evaluation Dates: From 2/1/2016 To 2/1/2016

Details

Hold Ctrl key to select multiple lines on a single policy.

Structure

Agency **INS - Insurance Services Inc.**
Branch **OAK - Insurance Services - Oak Brook**
Department **PL - Personal Lines**
Prft Cntr **PL-S - Personal Lines - Small**

Polices - All Except Marketed

Search where

Policy/Line Type	Policy Number	Eff
HOME	HO43567201	01
AUTO	TBD	06
AUTO	TBD	06
AUTO	TBD	06

Accept Transaction

Accept Transaction

Apply change for Rate transaction?

Effective date of change

Description

Issuing company

Premium payable

Route Attachment(s)

Attachment Routing

File Name	Status
Allied Insurance - Personal Auto - Epic - Quote Report/Text Proposal	Unrouted

Double click to route an attachment or hold the Ctrl key to select multiple attachments.

OK

Cancel

0.35s RTACCEPT

Attachments

Go

Cancel

[Launch to Agent Center - Please click only once.](#)

AGENT INFORMATION:

Insurance Services - Oak Brook
2005 Hyatt Circle
Oak Brook, IL 60523
Phone: 1-630-4689200
Fax: 1-630-4689201

QUOTATION PREPARED FOR:

Daniels, Michael Emily
726 Beech Dr
Schaumburg, IL 60193-
Home Phone: 8473526637
Work Phone:

Quote Number:	PPDM 0056841230	Quote Date:	02/01/2016	Policy Term:	6 months
Policy Effective Date:	02/01/2016	Effective Date of Rate:	01/25/2016	Monthly Payment:	\$215.80
Policy Premium:	\$1294.80	Down Payment Amount:	\$431.60		

DRIVER INFORMATION

Drv #	Name	D.O.B.	Sex	Marital/Civil Union Status	Relationship	License#
1	Michael A Daniels	01/03/1975	Male	Married	Applicant	J3985461
2	Emily K Daniels	09/06/1978	Female	Married		L34568734

VEHICLE INFORMATION

Veh #	Year/Make/Model	Type	Symbol	Territory	Usage
1	2009 HOND CIVIC LX	4 Door 100in	014	458	Work
2	2007 BMW 335i	4 Door 100in	020	458	Pleasure

COVERAGE INFORMATION - Vehicles 1-6 (*) Coverages shown in thousands of dollars

Coverage	Limit	Premium Veh 1	Premium Veh 2	Premium Veh 3	Premium Veh 4	Premium Veh 5	Premium Veh 6
Liability	250/500	\$180.17	\$183.65				
Property Damage	250	\$122.31	\$106.59				
Medical Payments	5000	\$37.12	\$25.23				
Comprehensive	Varies Per Vehicle	\$38.22 500 Ded	\$77.97 500 Ded				
Collision	Varies Per Vehicle	\$203.83 500 Ded	\$274.51 500 Ded				

Your 6 month premium for each vehicle is:

\$581.65 \$667.95

Uninsured Motorist BI (per policy)

25/50

\$45.20

Your total 6 month premium is :



\$1,294.80



TAM, Vision, DORIS & Epic Rating Vendor Reference Guide

APPLIED EPIC REAL-TIME CONFIGURATION AND USAGE



 TAM®, Vision®, DORIS® & Epic® Rating Vendor Reference Guide June 2015 X = Rating Available T = Currently Testing Rating Integration I = Rating Vendor working on Integration Contact the Rating Vendor for availability for your state. 	Personal Lines				Commercial	
	TAM, Vision, DORIS and Epic Flat File Bi-Directional Rating		Epic and TAM XML One Direction		TAM and Vision	
	Automobile	Homeowners	Automobile	Homeowners	Workers Compensation	
ACS - Agency Computer Systems	X	X				
Boston Software (WinRater)	X	X	I	I		
Capital Software	X	X				
CCI	X	X				
FSC - WinFSC (Vertafore)	X	X				
Gaines Insurance	X	X				
IBQ Systems	X	X	I	I		
ICE Systems, Inc	X	X				
ITC - Insurance Technologies Corp. (TurboRater)	X	X	X	X		
MI Assistant (Part of FSC) (Vertafore)	X	X	X	X		
M&R Information Services					X	
MULTICO Rating Systems	X	X				
PL Rating (Vertafore)	X	X	X	X		
Quadrant Information Services	X					
QuoteRush		X				
SEMCAT	X	X				

Epic Flat File Rating available as of 6.0 MU2
Product Codes = RITK or FFIN