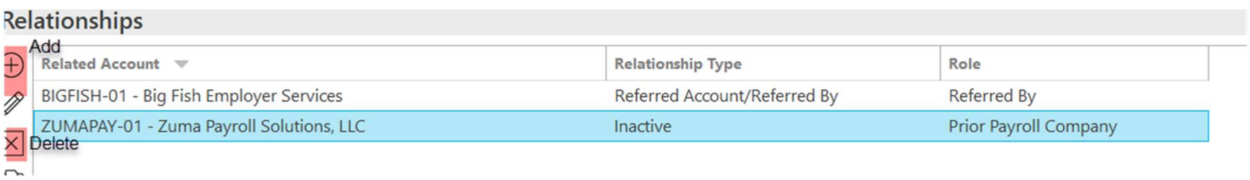
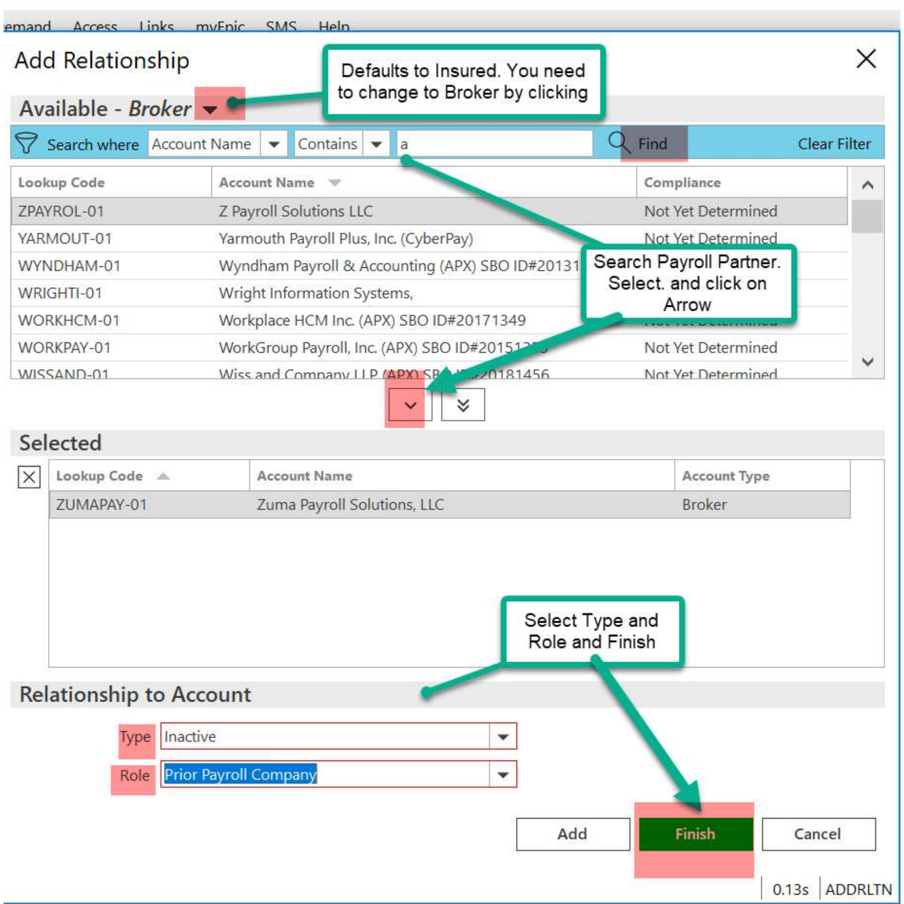
EPIC Update Workflow – Client Moves to Direct Bill

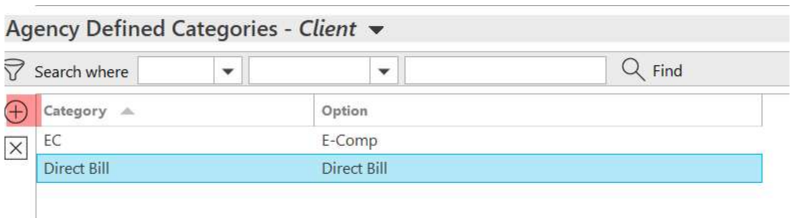
Step 1: Update Account Detail

- Relationships:
  - If Payroll Partner is the same – No change needed
  - If New Payroll Partner
    - Add in New Broker:
      - Type: Referred Account/Referred By
      - Role: Referred By
    - Update Old Payroll Partner (if it doe not let you, you may need to delete and add again)
      - Type: Inactive
      - Role: Prior Payroll Company

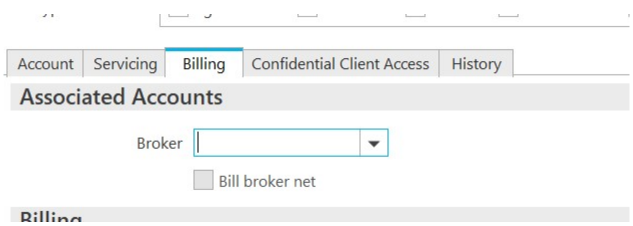




- Agency Defined Categories:
    - Update Software Platform to Direct Bill

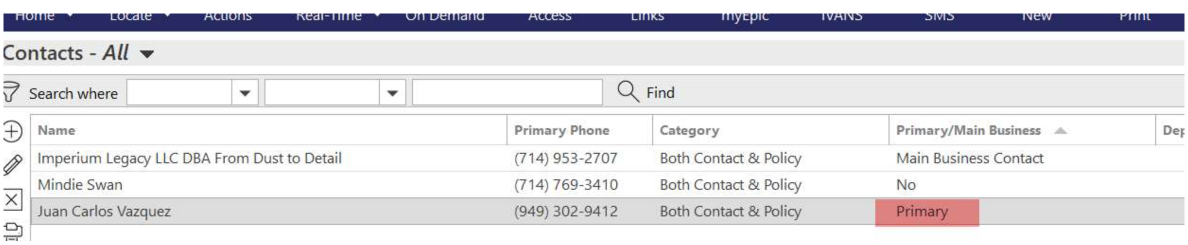


- Billing Tab:
    - Remove Payroll Partner



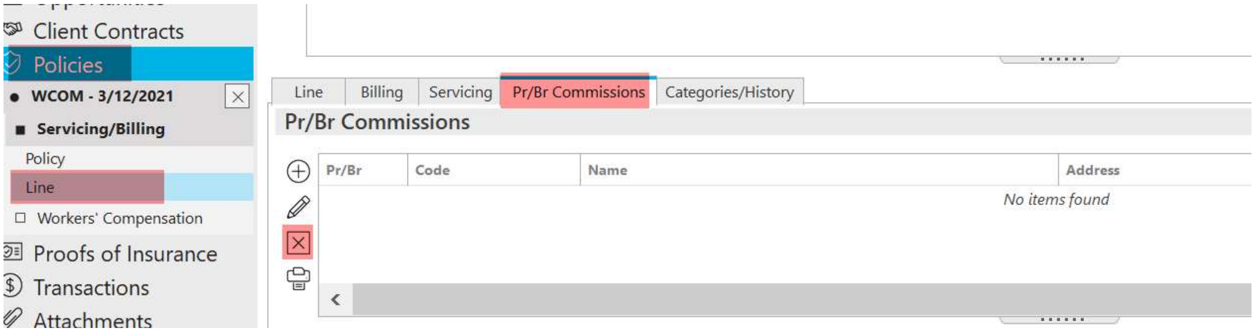
Step 2: Contacts :

- If there is a New Payroll Company
    - Add in New Payroll Company Rep
    - Make sure the Insured is set up as the Primary Contact.



Step 3: Update Policy:

- Update Pr/Br
    - Delete Previous payroll Company as they do not get rev share for account we refer to them



- Update Agency Defined Categories
  - Add in New Software Company
  - Maker sure the Officer information under Comments

Step 4: Don’t forget to update EPAY