

## 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 does not let you, you may need to delete and add again)
      - Type: Inactive
      - Role: Prior Payroll Company

Relationships

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emand Access Links mvEnic SMS Help

### Add Relationship

Available - **Broker**  Defaults to Insured. You need to change to Broker by clicking

Search where Account Name Contains a Find Clear Filter

Lookup Code	Account Name	Compliance
ZPAYROL-01	Z Payroll Solutions LLC	Not Yet Determined
YARMOUT-01	Yarmouth Payroll Plus, Inc. (CyberPay)	Not Yet Determined
WYNDHAM-01	Wyndham Payroll & Accounting (APX) SBO ID#20131	Not Yet Determined
WRIGHTI-01	Wright Information Systems,	Not Yet Determined
WORKHCM-01	Workplace HCM Inc. (APX) SBO ID#20171349	Not Yet Determined
WORKPAY-01	WorkGroup Payroll, Inc. (APX) SBO ID#20151203	Not Yet Determined
WISSAND-01	Wiss and Company LLP (APX) SBO ID#20181456	Not Yet Determined

### Selected

Lookup Code	Account Name	Account Type
ZUMAPAY-01	Zuma Payroll Solutions, LLC	Broker

Select Type and Role and Finish

### Relationship to Account

Type Inactive

Role Prior Payroll Company

Add Finish Cancel

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Client Contracts

Policies

WCOM - 3/12/2021

Servicing/Billing

Policy
 

Line

Workers' Compensation

Proofs of Insurance

Transactions

Attachments

Line

Billing

Servicing

Pr/Br Commissions

Categories/History

Pr/Br Commissions

+

Pr/Br

Code

Name

Address

No items found

✖

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

Line

Billing

Servicing

Pr/Br Commissions

Categories/History

Agency Defined Categories

+

Category

Option

✖

EC

E-Comp

Direct Bill

Direct Bill

Comments

Apply to All Lines

His

Direct  
 Excluded Officer - John Smith 100%

**Step 4: Don't forget to update EPAY**