

## Add Account in EPIC

Locate Criteria

Locate account: Client ☒ Insured ☒ Prospects  
Locate by: Account/Business Name ☒ Active ☐ Inactive

Account/Business name contains: SALON GREG

Results

Lookup Code	Account Name	Business	Client Type	Account Status	Address 1
No items found					

Enter in Client Name and work down the screen to set up

If it is bound business then you can change type to Insured

Add Account

Type: Insured  Individual ☒ Business

Business: Prefix: Salon Gregories Inc Name: Suffix:  Account name: Lookup code:  NAICS: D-U-N-S:  Referral - Carrier Agency: GRA Granite Professional Insurance Br... Branch: GRA Granite Professional Insurance Br... Account email: Website: Fax:  Business Phone:  Number: Description: CMC:

Add Referral Source – most of the time it will be Referral – Payroll

Hit + sign Under Relationships enter the Payroll Company

Account Detail

Add an Account

Contacts

Opportunities

Client Contracts

Policies

Proofs of Insurance

Transactions

Attachments

Claims

Activities

SMS History

Address: 200 Newport Center Dr, Newport Beach, CA 92660

Description: Site ID:

Primary Contact Information

Name: Bobby Samini First: Bobby Middle: Samini Last: Suffix:  Formal: info@spagregories.com Primary email: Primary phone: Business (949) 339-1317 SMS:

Preferences: Contact via: Phone Billing: Mail Servicing: Mail Marketing: Mail

Marketing Opt-Ins: ☐ Phone ☐ Fax ☒ Email ☐ 3rd Party

Business SMS Opt-Ins: ☒ Marketing ☐ Conversational

Primary SMS Opt-Ins: ☒ Marketing ☐ Conversational

Comments: Direct

Relationships:  Relationship Type: Role:



Under Agency Defined Categories Enter Department = ECOMP & Software Platform or Proprietary/E-COMP Express

Comments: Direct

Relationships:

Agency Defined Categories:

Search where: Find

Category: EC Option: E-Comp

Continue

Hit Continue then work across the tabs

Servicing Enter AM & Producer & Claims Manager if it meets guidelines

- AM = Jesse , Joy, Lisa
- Producer = Andrew , Marianne, Shawn (house)
- Claims - Mark

Account Detail

Account:

Account name: Salon Gregories Inc Type: Insured

Lookup code: SALOGRE-01 Balance: \$0.00

Account source: Referral - Carrier Do not purge

Type of business: ☐ Agriculture ☐ Benefits ☐ Bonds ☒ Commercial ☐ Financial Services ☐ Life & Health ☐ Personal ☐ Other

Account Servicing Billing Confidential Client Access History

Servicing Contacts:

Employee	Description
P&C Client Manager: Jesse Keast	
P&C Producer: Shawn Edgington	
Benefits Producer	
Benefits Client Mgr	
Claims Manager	

Billing

Enter the Payroll partner in the Broker box – need them in so they pull to the PR/BR



Type of business ☐ Agriculture ☐ Benefits ☐ Bonds ☒ Commercial ☐ Financial Services ☐ Life & Health ☐ Personal ☐ Other

Account Servicing **Billing** Confidential Client Access History

**Associated Accounts**

Broker **APEX000-01** Apex [Broker Details](#)

☐ Bill broker net

**Billing**

Invoice page break	Client	Statement page break	Account
Invoice layout	Default Invoice	Statement layout	Default Client Statement

☐ Apply late charges on overdue balances

## Contact – Enter each contact, Category and Description

- Types
  - Name of Business – Policy – Add in the FEIN #
  - Each Named Insured - Policy Only
  - Owner – Contact & Policy
  - Other contacts like an office manager or accountant – Contact Only
  - Payroll company rep – Contact Only
- Category
  - Policy
  - Contact,
  - Policy & Contact
- Description
  - Insured
  - Owner
  - Accountant
  - Payroll Rep
  - Etc

Home Locate Actions Real-Time On Demand Access Links myEpic IVANS SMS New Print

**Individual Contact**

Name Prefix Bobby First Middle Last Samini Suffix Primary contact

Category Both Contact & Policy Description Owner

Formal Informal

**Address** **Comments**

☒ Use account's address ☐ Mailing ☐ Billing

200 Newport Center Dr  
Newport Beach, CA 92660

Description Site ID

Contact Info Drivers Personnel/Classifications Employer Document Methods



## Enter FEIN on Main Business Contact

Category: Both Contact & Policy

Description:

Address

☒ Use account's address ☐ Mailing ☐ Billing

200 Newport Center Dr  
Newport Beach, CA 92660

Description:

Site ID:

Comments

Salon Gregories Inc

Opportunities

Client Contracts

Policies

Proofs of Insurance

Transactions

Attachments

Claims

Activities

SMS History

Contact Info Business Info Identification Numbers Classifications

Identification Numbers

Type Description Identification Number

Add Identification Number

Type: FEIN

Description: Federal Employer Identification

Identification number:

Add Finish Cancel

0.07s | BSCNADID

Set Primary Contact to the person you will call – they show up on the left menu in Epic



**APPLIED**  
Epic

Home Locate Actions

Account Detail

**Contacts**

Opportunities

Client Contracts

Policies

Proofs of Insurance

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Attachments

Claims

Activities

SMS History

Contacts - All

Search where

Name

Salon Gregories Inc

**Bobby Samini**

Address

200 Newport Center Dr  
Newport Beach, CA 92660

Business - Primary

(949) 339-1317

Business

Fax

Mobile

Other

**Primary** Additional

Bobby Samini  
200 Newport Center Dr  
Newport Beach, CA 92660  
United States of America  
(949) 339-1317  
[info@spagregories.com](mailto:info@spagregories.com)  
Contact via: Phone

Client Contract – you add if they have Claims Service

Policies – to set up line

+ Add and main scree should prefill for you – complete the rest

**APPLIED**  
Epic

Home Locate Actions Real-Time On Demand Access

Account Detail

Contacts

Opportunities

Client Contracts

**Policies**

Proofs of Insurance

Transactions

Attachments

Claims

Policies - Current/Renewed

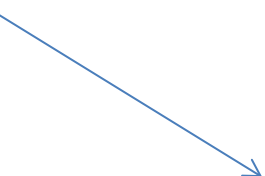
Search where

Line

Policy Description

Status Description

Bound Business





File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

**APPLIED** Home Locate Actions Real-Time On Demand Access Links myEpic IVANS SMS New Print Save Undo

Account Detail  
Contacts  
Opportunities  
Client Contracts  
**Policies**  
Add a Policy  
Proofs of Insurance  
Transactions  
Attachments  
Claims  
Activities  
SMS History

**Policy Detail**

☒ Prospective ☐ Contracted

Type: WCOM Workers' Compensation

Description: Workers' Compensation

Policy #

Effective: 10/23/2019 Expiration: 10/23/2020

Source: Referral - Payroll Company

☐ Turn off policy download

**Structure**

Agency: GRA Granite Professional Insurance Brokerage, Inc.

Branch: GRA Granite Professional Insurance Brokerage, Inc.

Department:

**Policy Estimated Premium/Commission**

Premium

Commission

☒ None ☐ Multi-Carrier Schedule ☐ Multi-Commissions

**Lines of Business**

Line: WCOM Workers' Compensation

Status: NEW New Business

Issuing location: CA California

☐ Agency bill ☒ Direct bill

Profit center

Issuing company

Premium payable: CA

Payable contract

Prefill

**Line Commission**

☐ Default commission agreement

Agreement

Type: %

Percent

Amount

**Line Estimated Premium/Commission**

Premium

Commission Calculate

Primary Bobby Samini

Additional

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

**APPLIED** Home Locate Actions Real-Time On Demand Access Links myEpic IVANS SMS New Print Save Undo

Account Detail  
Contacts  
Opportunities  
Client Contracts  
**Policies**  
Add a Policy  
Proofs of Insurance  
Transactions  
Attachments  
Claims  
Activities  
SMS History

**Policy Detail**

☐ Prospective ☒ Contracted

Type: WCOM Workers' Compensation

Description: Workers' Compensation

Policy #

Effective: 8/10/2019 Expiration: 8/10/2020

Source: Referral - Payroll Company

☐ Turn off policy download

**Structure**

Agency: GRA Granite Professional Insurance Brokerage, Inc.

Branch: GRA Granite Professional Insurance Brokerage, Inc.

Department: EC E-COMP, A Division of Granite Insurance Brokers

**Policy Estimated Premium/Commission**

Premium: \$5,978.00

Commission: \$657.58

☒ None ☐ Multi-Carrier Schedule ☐ Multi-Commissions

**Lines of Business**

Line: WCOM Workers' Compensation

Status: NEW New Business

Issuing location: CA California

☐ Agency bill ☒ Direct bill

Profit center: PFC All Lines of Business

Issuing company: HARTF8 Hartford Fire Insurance Company

Premium payable: CA HARTF5 The Hartford Insurance Company

Payable contract

Prefill: Work Comp CA

**Line Commission**

☒ Default commission agreement

Agreement: New & Renewal or BofR - ECOMP & Wholesale

Type: %

Percent: 11.0000%

Amount

**Line Estimated Premium/Commission**

Premium: \$5,978.00

Commission: \$657.58 Calculate

Primary Bobby Samini  
200 Newport Center Dr  
Newport Beach, CA 92660

Additional

Click Detail to open up the Acord

Work through tabs



Line	Billing	Servicing	Pr/Br Commissions	Categories/History
<b>Billing</b>				
Billing plan		<input type="text"/> <input type="checkbox"/> Financed		
Tax option		<input type="text" value=" &lt;Not Applicable&gt;"/>		
<b>Send Invoice To</b>				
Type	<input type="text" value="Client"/>			
Account	<input type="text" value="SALOGRE-01"/> <b>Salon Gregories Inc</b>			
Contact	<input type="text" value="Salon Gregories Inc"/>			
Address	<input type="text" value="200 Newport Center Dr"/> <input type="text" value="Newport Beach, CA 92660"/>			
Description	<input type="text"/>			
Site ID	<input type="text"/>			
Loan #	<input type="text"/>			
Delivery method	<input type="text" value="Mail"/>			
Email	<input type="text"/>			
Fax	<input type="text"/>			

PR/BR - is where we enter the Payroll Partner to get commission (Rev Share)

+ add



Client Contracts

Policies

- WCOM - 8/10/2020
- 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	Type
No items found				

Pr/Br Commission

Pr/Br: BPAY

Code: ABACPAY-02

Commission Agreement: Revenue Share

Contract:

Type: %

Percent: 3.0000%

Amount:

Production credit %: 100.0000%

Order #: 0

Add Finish Cancel

- For Hartford the BPAY Rev Share on the EPIC PR//BR Policy Tab. First look and see what % the BPAY is making:

Pr/Br Commission

Pr/Br: BPAY

Code: PAYLOC-01

Commission Agreement: Revenue Share

Contract:

Type: %

Percent: 3.0000%

Amount:

Production credit %: 3.0000%

Order #: 3

Add Finish Cancel

then change back to Hartford

Pr/Br Commission

Pr/Br: BPAY

Code: PAYLOC-01

Commission Agreement: Ind Revenue Share SEE GRID

Contract:

Type: %

Percent: 27.2700%

Amount:

Production credit %: 100

Order #: 0

Add Finish Cancel

And enter the rev share from the matrix using the @

#### HARTFORD COMMISSION MATRIX FOR PAI

Hartford Policy Commission (use @ symbol for Hartford)

BPAY comm		
1%	9.09	
2%	18.18	
3%	27.27	
4%	36.36	
5%	45.45	
6%	54.55	
8%	72.73	

enter the correct number in the policy screen with @



Categories – Enter the Dept. & Payroll software platform / proprietary / E-COMP Express

(This matches the Acc Detail Screen – yes you are entering 2X but it is used to pull reports in different ways.)

Line	Billing	Servicing	Pr/Br Commissions	Categories/History
<b>Agency Defined Categories</b>				
+	Category ▲	Option	Delete on Renew	
x	EC	E-Comp		

Comments - This will show up on the Policy Screen so it is a good reference

Policies - Current/Renewed ▼ Filter Defaults Collapse All

Search where    Find

Line	Policy Description	Status Description	Dept	Policy Number	Effective ▲	Expiration	Iss Loc	PPE	Bill	ICO
WCOM	Workers' Compensation	New Business	EC	76WEGAD9ERA	8/10/2019	8/10/2020	CA	HARTF5	D	HARTI

Hartford Fire Insurance Company L... Policy Inquiry Billing Inquiry Claim Inquiry

**Policy Detail** **Line Detail** In Progress/Suspended Workfl

Contracted	Bill Direct	Status NEW - New Business
Effective 8/10/2019 - 8/10/2020	Invoice to Client - Salon Gregories Inc	ICO HARTF8 - Hartford Fire Insurance Company
Type WCOM - Workers' Compensation	200 Newport Center Dr	PPE HARTF5 - The Hartford Insurance Company
Source Referral - Payroll Company	Newport Beach, CA 92660	Comments Direct
SIC		

**Comments** Apply to All Lines

Direct

First Written Date – This is the first date we wrote in the agency. If you change the eff date after you have enter the WC line make sure you update this field. It should match the EFF date of the policy



Then Enter Accords

Update Stage to

Activities