Applied

Grow the Benefits book in the same system as P&C

Applied Epic® Benefits gives Benefits teams one purpose-built workspace, where a plan entered once feeds quoting, enrollment, and commission statements.

"We chose Applied Epic for benefits technology for multiple reasons. One, we use Applied Epic as our one source of truth. We do not want to have multiple systems in our office for accounting, procedures and processes. The advances that are going on right now for Benefits is huge."

Maria Stevenson
General Manager, Sea Mountain Insurance

67% Faster plan data entry

5 hr Less spreadsheet work per renewal

6x Fewer clicks to reach plan details

2-3 hr Saved per small-group client

What runs the Benefits book

Plans that live on the account

You upload the carrier summary, and the plan writes itself, compliance dates included.

Quotes from wherever your team works

You can model plans in Applied Epic or import finalized ones from an outside platform.

Commission lines matched to every plan

Each statement line matches to its plan, so your finance team can see what every payment covers.

Why Applied Epic®

Work in a system that knows plans

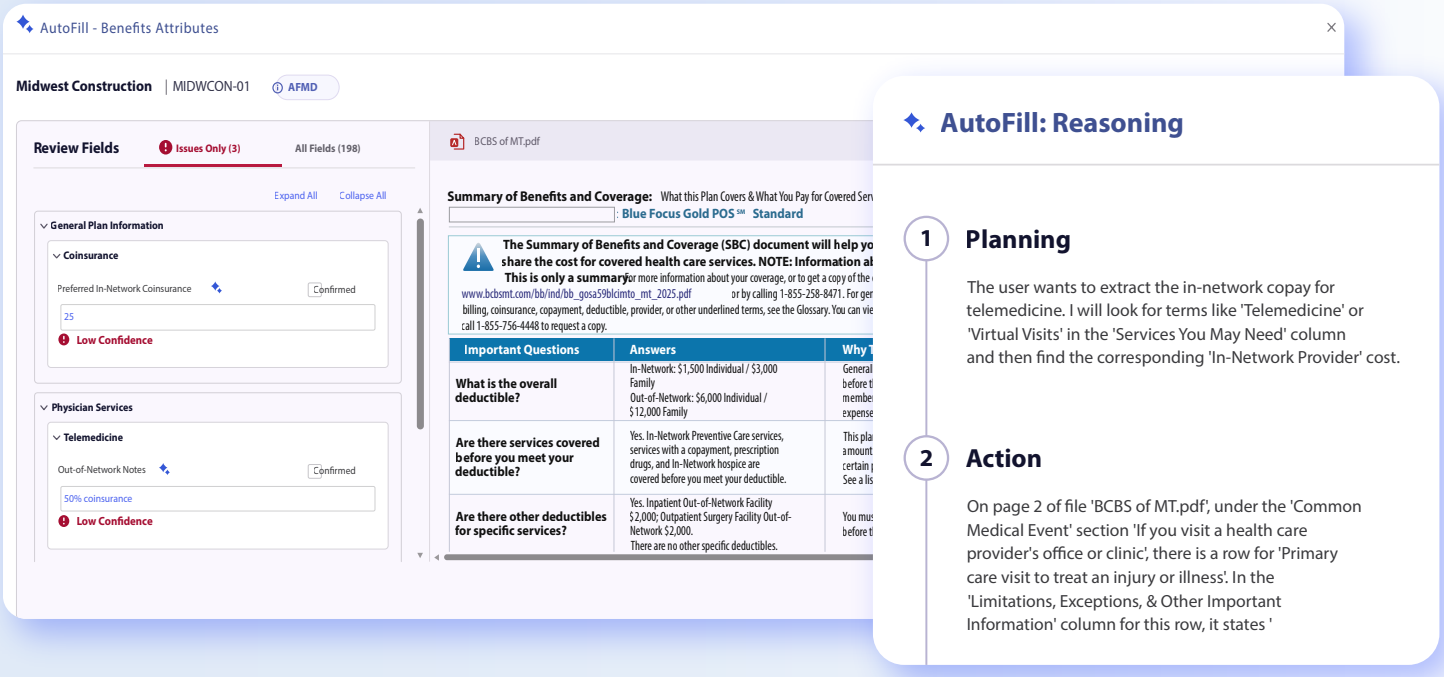
Applied Epic has dedicated fields for rates, eligibility and compliance dates, so plan details don't get forced into P&C screens.

See the entire client on one record

Many P&C clients also buy Benefits, so their plans sit on the same account as their policies.

Enter a plan once

Plan setup feeds quoting, enrollment, servicing and commission statements – no rekeying.



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