Applied

Finish applications without the paper chase

Collaboration Portal in Applied Epic® brings you and the client into a single application, then sends the final product to carriers and onto the account.

"The use of Collaboration Portal made a huge difference in how long it takes to process an application. Because it's sent digitally to the client and the client is forced to punt it back filled out, it doesn't take days or weeks for a submission to come in. It comes back sometimes even the same day."

Wanda Toro, SVP and Director of Business Technology, Towne Insurance Agency

35+ min saved on every renewal

75% less back-and-forth with clients

10,000+ ACORD and carrier applications available

How it works

Work the application together

Agents and clients answer questions in one form, with comments and tracked changes replacing emails and phone calls.

Let the form fill itself

AI fills the ACORD form from an uploaded dec page and flags what to confirm.

Collect signatures without printing anything

Clients sign forms, schedules and documents electronically, which eliminates the print-scan-fax cycle.

Why it belongs in Applied Epic®

Signed applications sync to the account

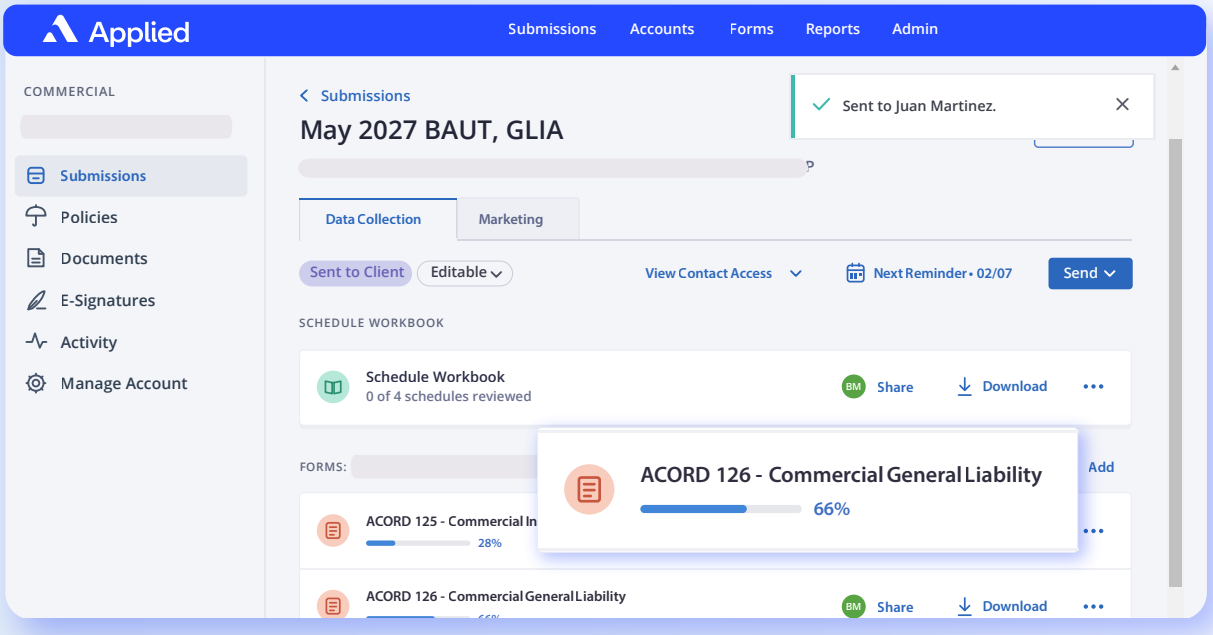
A signed application updates the policy, attaches documents and logs history inside Applied Epic.

What the client says gets logged

Every verification, edit and comment has a timestamp, so the file shows what was confirmed.

One answer maps to every form

Answers map to every relevant question across forms – nobody enters the same detail twice.



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