

Applied Epic® Browser Rollout Checklist



Technical Preparation

- Consider Integrated Identity Management
- Validate Your Unique Browser URL
- Review Important Applied Epic Product Information
- Review Recommended Network and Computer Settings
- Determine a Connection Suite Deployment Plan

Organizational Planning

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- Identify Key Stakeholders
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Browser Go Live

- Send Login Instructions to All Employees
- Remove Shortcut From Desktop Interface

Ongoing Support

- Define How Staff Can Get Help
- Review Login Activity
- Hold Regular Check-Ins with Staff

This is designed to be a quick reference guide and checklist for the steps to move your agency to the Applied Epic browser interface. If you have any questions, please email CustomerSuccess@appliedsystems.com.

Technical Preparation

- **Consider Integrated Identity Management**

Integrate your agency's identity provider (IdP) for additional security protection. Review [Understanding Identity Management with Applied](#) for additional information or [contact Applied Support](#) with questions.

If your agency has enabled Single Sign-On within Applied Epic, you'll need to change this method of logon. [Contact Applied Support](#) for assistance.

- **Validate Your Unique Browser URL**

Your unique browser URL is a combination of the address below and your Enterprise ID:

`https://CLIENT12.appliedepic.com`

Replace CLIENT12 above with your agency's Enterprise or Client ID. This is the same code you use when calling Applied Support and can also be seen on the bottom right of the Applied Epic Login screen (typically 5 letters 2 digits but may differ)

- Type the address with your Enterprise ID into your internet browser. The next screen will ask for your agency's Enterprise ID. This only happens once to validate the login.
- Click Login – then enter your Usercode and Password
- If applicable, choose the correct database – then you're in!

If you experience problems when logging in, [contact Applied Support](#).


- **Review Important Applied Epic Product Information**

Sign into [Applied Community](#) for documentation designed to help you prepare for the move to the browser.

Applied Epic Hardware Configuration Guidelines, Software

Configuration Guidelines and **Product Compatibility Grid** can be found in *Applied Epic > Release Information > Product Documentation 2025*.

Applied Epic Release Notes can be found in *Applied Epic > Release Notes > Latest Release Notes* and will provide the latest updates to Epic.

Anything that is specific to the browser interface only will show this icon  in front of the description.

- **Review Recommended Network and Computer Settings**

There are multiple settings on your network and individual computer that can affect the performance of the Applied Epic browser interface. Review the webinar and accompanying guide below for information and links to the Applied Community Knowledge Base articles we recommend for the best user experience in the browser interface.

- [Applied Epic Browser: Essential Settings for a Smooth Start](#)
- [Quick Config Guide](#)

- **Determine a Connection Suite Deployment Plan**

The Connection Suite is a set of components that enable certain parts of Applied Epic to work in a browser environment and in conjunction with the Windows operating system. Once the components of the Connection Suite are loaded, Microsoft programs integrate similarly to how they function in the desktop interface while also ensuring a secure connection. For more information on the Connection Suite, review [Epic Browser - Installing the Connection Suite](#).

Organizational Planning

- **Plan for Change Management**

The Applied Epic browser interface has most of the same capabilities as the desktop interface in a modernized design. This means things may work a little differently than you're used to, but the core purpose of each Applied Epic workflow remains the same. Here are some tips to make this change easier on everyone:

- For key specific differences in functionality between the desktop and browser, please refer to the [Epic Browser User Guide - Differences in Functionality](#) section.
- **Communicate with your staff:** It's important to communicate the “what, why and when” so your staff understands what's expected and can prepare appropriately. Applied recommends you communicate with your staff at different points in the process, including:
 - 30+ days before the move date to announce the change
 - 5-15 days before as a reminder
 - On the day of launch to provide login instructions and directions to get help should they run into any issues or need assistance
- **Support your staff:** Have a plan for how you will support your staff post-launch. See the Ongoing Support section below for some ideas.

• Identify Key Stakeholders

You will need some assistance to get your agency successfully rolling on the browser. Your team should include the following:

- **A Change Champion** who will lead the agency through this change. This may be you or someone else in your agency.
- **IT Lead** who will handle the technical requirements involved. This includes ensuring technical preparedness, installing the Connection Suite if required, and, depending on your setup, performing initial troubleshooting if technical issues arise.
- For larger agencies, you may want to include **Power Users** who will validate your agency's workflows. These power users are the people who are familiar with their department's workflows and use Applied Epic efficiently every day. We recommend representation from all departments, including Download Processing, Front Desk/Mailroom, and Accounting.

• Determine Rollout Approach and Completion Dates

Use these tips to help determine the right approach and timing for rolling the Applied Epic browser out to your users.

- A couple of questions to consider:
 - Would it be best for all employees to go live on the browser interface at once, or would it be better to transition by department?
 - If you have multiple locations, do you stagger by office?
 - Decide on a date to finish the rollout to everyone. Here are a few things to consider when setting those dates:
 - Avoid time frames that conflict with other large projects.
 - Take into consideration high renewal periods or high enrollment months. Introducing change during these peak times could negatively impact your rollout success.

Browser Go Live

- **Send Login Instructions to All Employees**

Send an announcement email to your staff with the following information:

- Applied Epic browser login instructions, including your unique browser URL, Enterprise ID, and Database name (if users have more than one option to choose from).
- Instructions for what users should do if they encounter problems or technical issues, such as an error message.

- **Remove Shortcut From Desktop Interface**

To encourage adoption, we recommend removing the desktop shortcut from computers. Some agencies do this on the day of go-live, while others wait a week or two.

Ongoing Support

- **Define How Staff Can Get Help**

Your agency should have a plan for how to help users if they run into issues. How you support your staff is your decision based on available resources. Encourage users to report any issues so you can partner with Applied to resolve them.

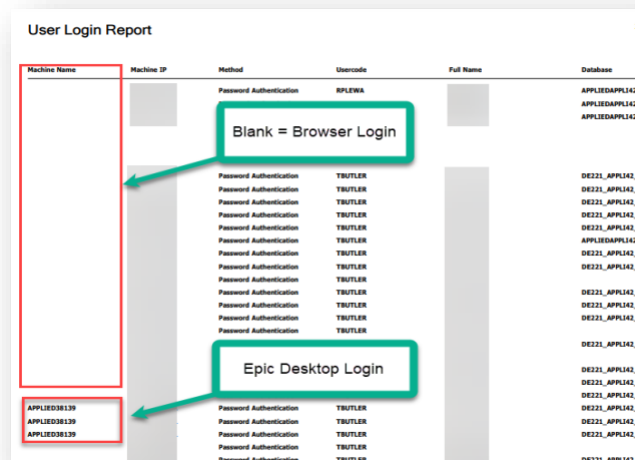
Larger agencies may have an internal helpdesk who can assist with troubleshooting any issues as a first step. If you choose to go this route, we recommend the following:

- Leave a Zoom meeting open for the first few days of browser usage. As users submit tickets that need to be researched further, invite them to join so they can be served in real time.
- Most issues will be related to the items listed in the Technical Preparation section above, so advise your IT staff to have those resources handy.
- For issues that need to be investigated by Applied, have your help desk contact Applied Support on the user's behalf.

Some agencies find it best for users to report issues to the key stakeholders, who will provide the first level of support. Then, after initial troubleshooting, if the problem cannot be resolved, contact Applied Support.

- **Review Login Activity**

**Reports/Marketing > Management Reports
User Login Report**



Machine Name	Machine IP	Method	Username	Full Name	Database
		Password Authentication	RPLEWA		APPLIEDAPPL142
		Password Authentication			APPLIEDAPPL142
		Password Authentication			APPLIEDAPPL142
		Password Authentication	TRUTLER		DE221_APPL142_11
		Password Authentication	TRUTLER		DE221_APPL142_11
		Password Authentication	TRUTLER		DE221_APPL142_11
		Password Authentication	TRUTLER		DE221_APPL142_11
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		Password Authentication	TRUTLER		DE221_APPL142_11
APPLIED38139		Password Authentication	TRUTLER		DE221_APPL142_11
APPLIED38139		Password Authentication	TRUTLER		DE221_APPL142_11
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APPLIED38139		Password Authentication	TRUTLER		DE221_APPL142_11

Applied Epic has a report available to verify your team’s browser usage. Under *Reports > Management*, run the User Login Report. The Machine Name column will be blank when a user logs in via the browser. This transparency into your team's login habits enables positive conversations where you can tackle any hesitation to using Applied Epic in the browser environment.

- **Hold Regular Check-Ins with Staff**

Finally, it’s important to meet regularly with your key stakeholders and staff. Keep the lines of communication open for staff to provide feedback. This will enable you to keep a pulse on how your team is adjusting to this change and notice any pattern in issues they’re encountering. This also provides for a better overall experience!