

APPLIED EPIC REAGAN CONSULTING BEST PRACTICES DATA COLLECTION FILE JOB AIDE

January 2019



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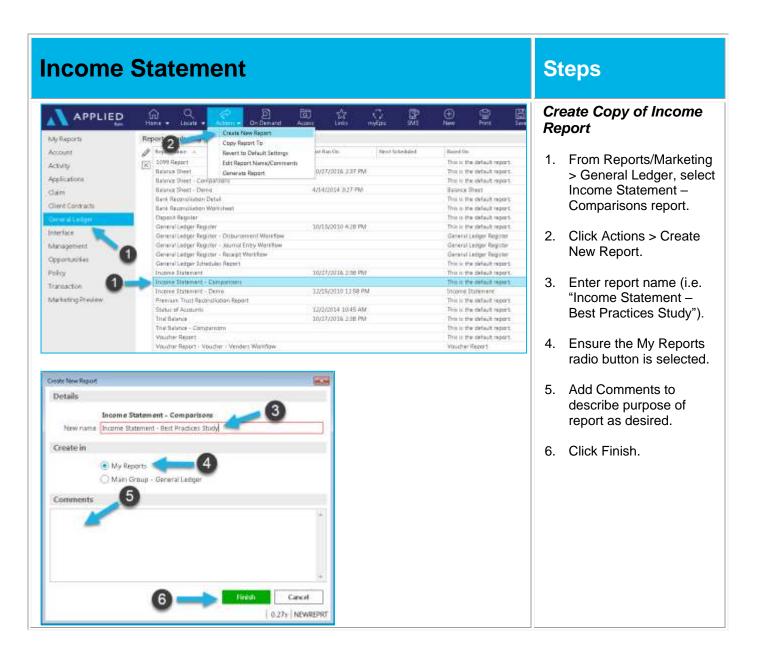
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The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Income Statement DATA ENTRY tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

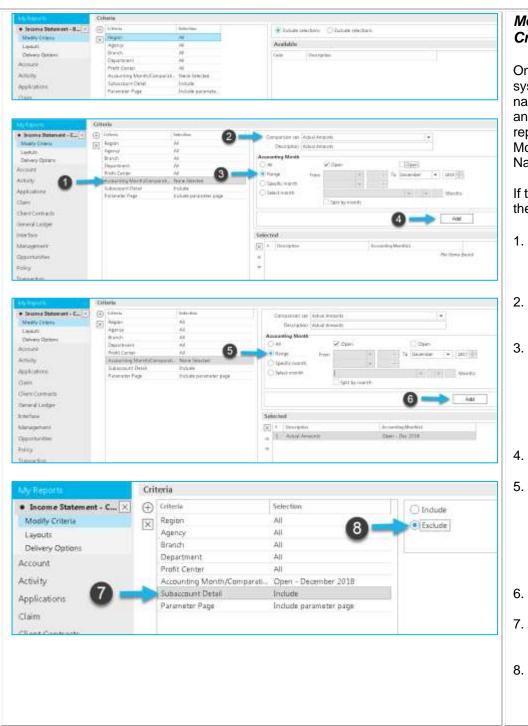
This Job Aid will use the Income Statement and Status of Accounts reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report







Modify the Report Criteria

Once you select Finish, the system will automatically navigate you to My Reports and open the newly created report. You will be in the Modify Criteria area on the Navigation Panel.

If this doesn't occur, perform these steps manually.

- 1. Select the Accounting Month/Comparatives criteria.
- 2. Set the Comparison Set to Actual Amounts.
- Set the Accounting Month to a Range through the last month of your current fiscal year (i.e. Open to December 2018.
- 4. Select Add.
- Adjust the Accounting Month Range through the last month of the prior fiscal year (i.e. Open to December 2017).
- 6. Select Add again.
- 7. Select the Subaccount Detail criteria.
- Select Exclude (the sub detail is not needed in the survey).



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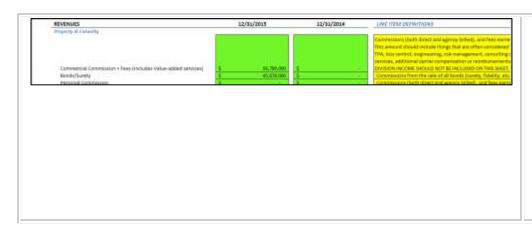
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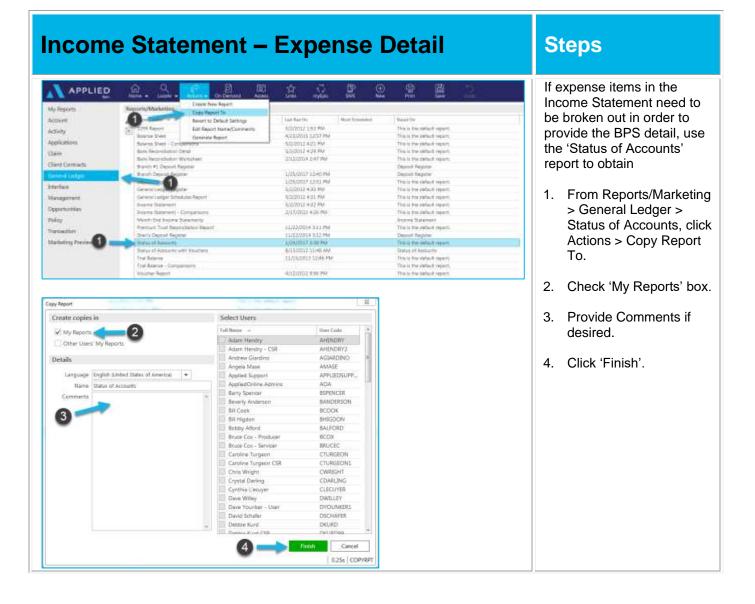
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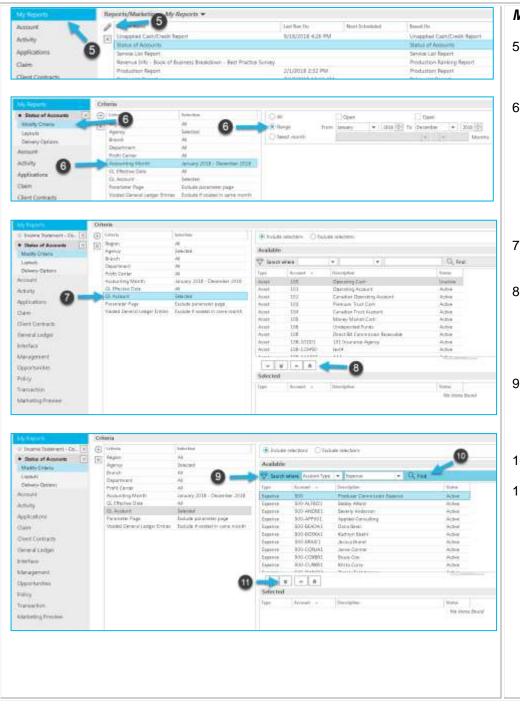


Transfer expense numbers to survey

Note: to complete the Income Statement DATA ENTRY tab, you may need to manually combine (or separate) amounts based on how your Chart of Accounts is structured to align with the categories as presented in the Collection File







Modify Criteria

- 5. Edit the Status of Accounts report in My Reports.
- Stay on Modify Criteria screen. Edit Accounting Month criterion and select Range radio button. The range should reflect year being reported on (i.e. Jan 2018 – Dec 2018).
- 7. Select the GL Account criteria.
- Remove all currently selected accounts from the Selected frame using the double up arrow button.
- Use the Search where bar set to Account Type and Expense to find all Expense GL accounts.
- 10. Click Find.
- 11. Use the double down arrow button to move all into the Selected area. If detail is needed on only a select number of Expense accounts, use the single down arrow to move just those accounts to the Selected area. Note: use the Ctrl and Shift keys to multi-select accounts.



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The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Income Statement DATA ENTRY tab (Income BY DEPARTMENT) in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

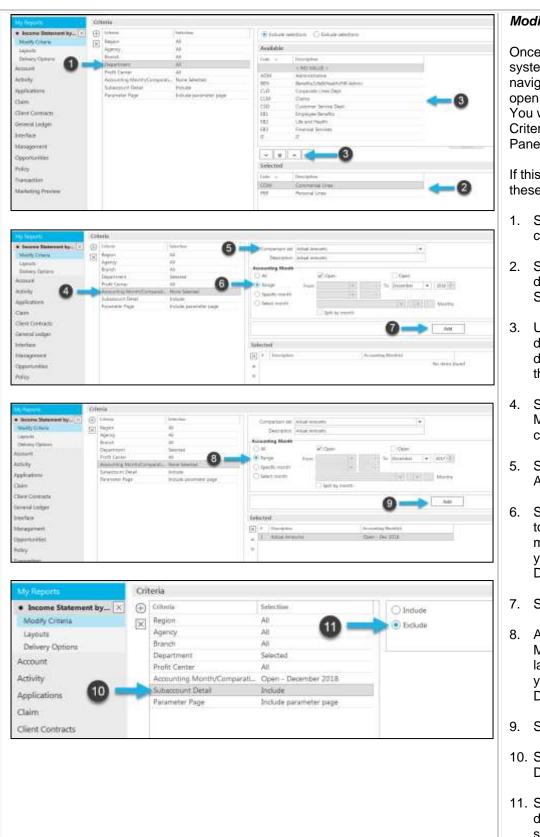
This Job Aid will use the Income Statement - Comparisons report. It is important that you begin with default version of this report. If you have modified the default version of the report, you will want to save your versions as a new report so that you can revert back to the default version of this report.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

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Modify the Report Criteria

Once you select Finish, the system will automatically navigate you to My Reports and open the newly created report. You will be in the Modify Criteria area on the Navigation Panel.

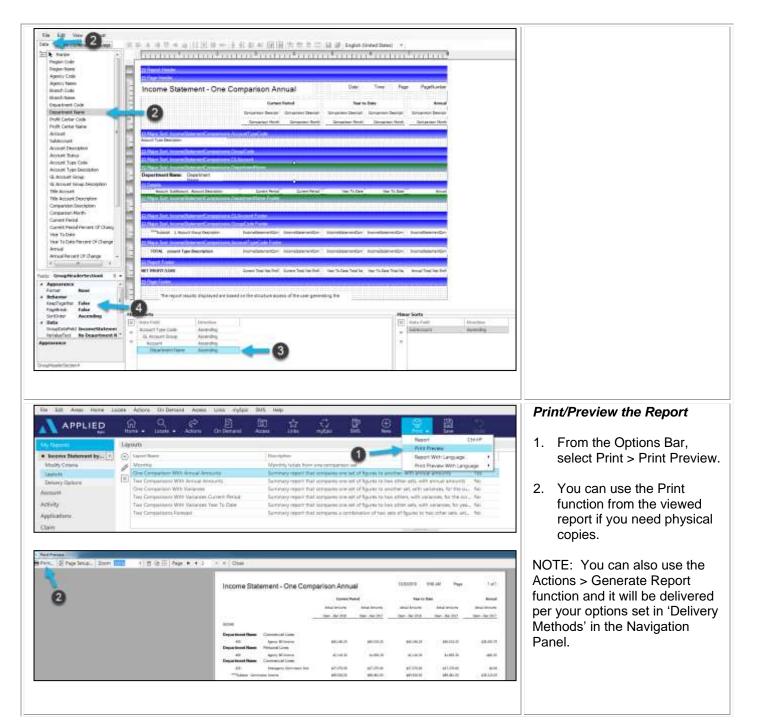
If this doesn't occur, perform these steps manually.

- 1. Select the Department criterion.
- Select each non-P&C department listed in the Selected area.
- Use the single up arrow to deselect all non-P&C departments and move them to the Available area.
- 4. Select the Accounting Month/Comparatives criterion.
- 5. Set the Comparison Set to Actual Amounts.
- Set the Accounting Month to a Range through the last month of your current fiscal year (i.e. Open to December 2018.
- 7. Select Add.
- Adjust the Accounting Month Range through the last month of the prior fiscal year (i.e. Open to December 2017).
- 9. Select Add again.
- 10. Select the Subaccount Detail criterion.
- 11. Select Exclude (the sub detail is not needed in the survey).



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PRO FORMA TAB

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Other Financial Data tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aid will use the Income Statement and Status of Accounts reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

Pro Forma Adjustments	Steps
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APPLIED EPIC REAGAN CONSULTING BEST PRACTICES COLLECTION FILE JOB AID INCOME STATEMENT DATA ENTRY TAB	These will likely be manually generated numbers using the Status of Accounts report to acquire detail by GL.
December 2018	If specific accounts were created by your organization and are line items on your
	Income Statement, refer to the Job Aid for the Income Statement Data Entry tab and pull your numbers from there.
	If not, see GL Detail instructions below.



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GL Account Detail

NOTE: If income items in the Income Statement need to be broken out in order to provide the BPS detail, use the 'Status of Account' report to obtain

- From Reports/Marketing > General Ledger > Status of Accounts, click Actions > Copy Report To.
- 2. Check 'My Reports' box.
- 3. Provide Comments if desired.
- 4. Click 'Finish'.
- 5. Edit the Status of Accounts report in My Reports.
- Stay on Modify Criteria screen. Edit Accounting Month criterion and select Range radio button. The range should reflect year being reported on (i.e. Jan 2018 – Dec 2018).
- 7. Edit GL Account criterion and ensure 'Include selection' radio button is selected.
- 8. Initially move all accounts up into the Selected list.
- 9. Select which accounts you need to break out items for the BPS and move them into the Selected list. Note: you can filter for specific account types (i.e. income or expense) and use the double down arrow to move all accounts or multiselect and use the single down arrow to move specific accounts.



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OTHER FINANCIAL DATA – ACQUISITIONS & DIVESTITURES

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Other Financial Data tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aid will use the Income Statement and Status of Accounts reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

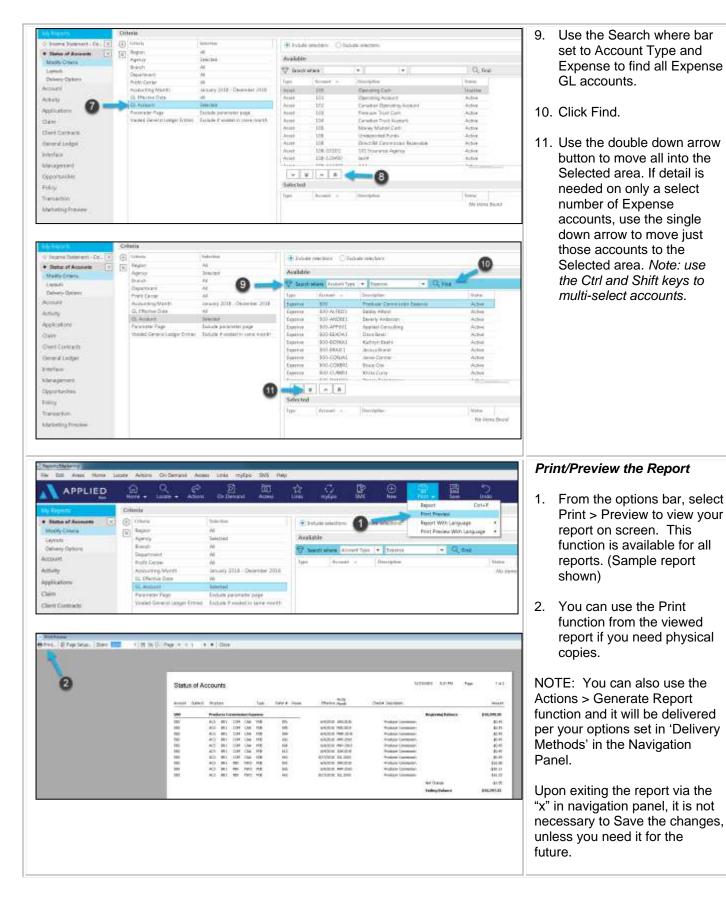
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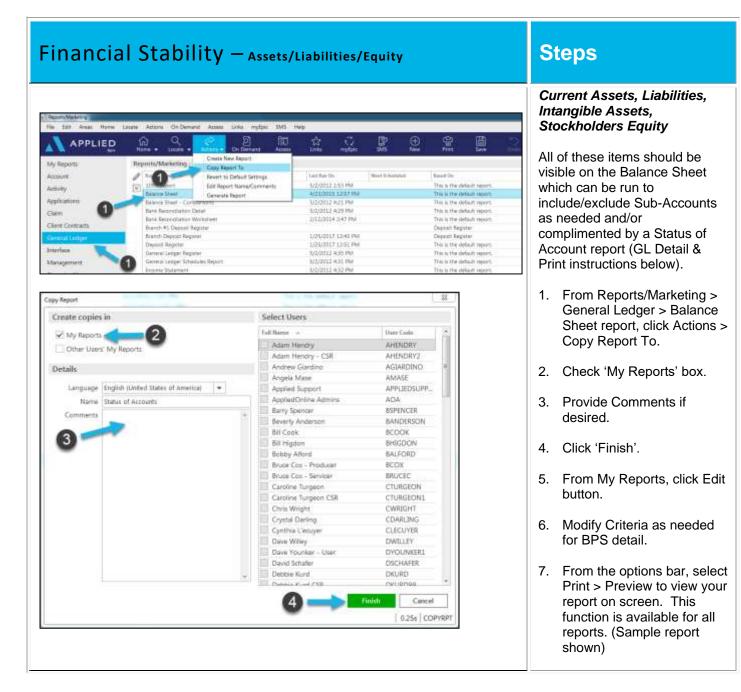
OTHER FINANCIAL DATA ENTRY – FINANCIAL STABILITY

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Other Financial tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aid will use the Balance Sheet, Income Statement, Balancing Current Receivables, and Status of Accounts reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

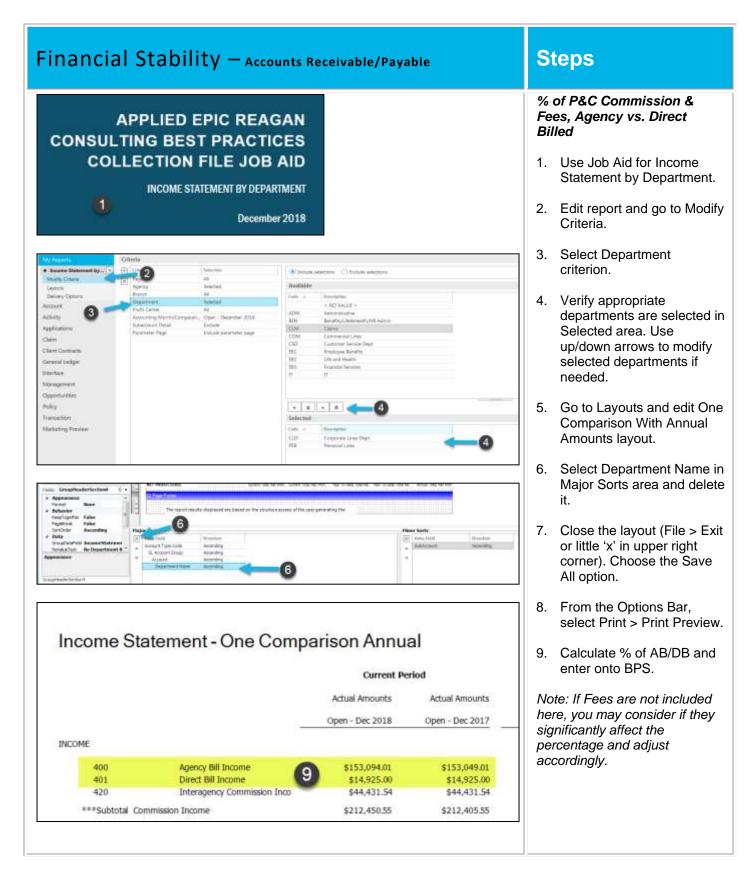




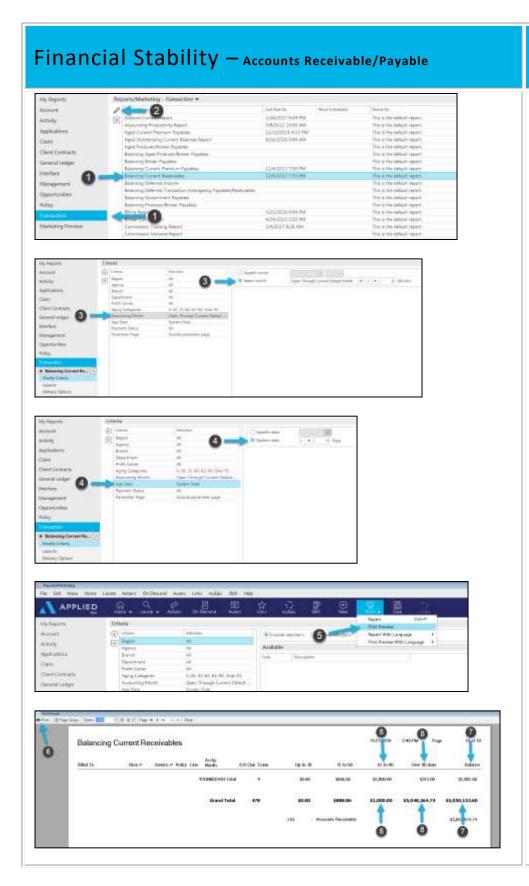
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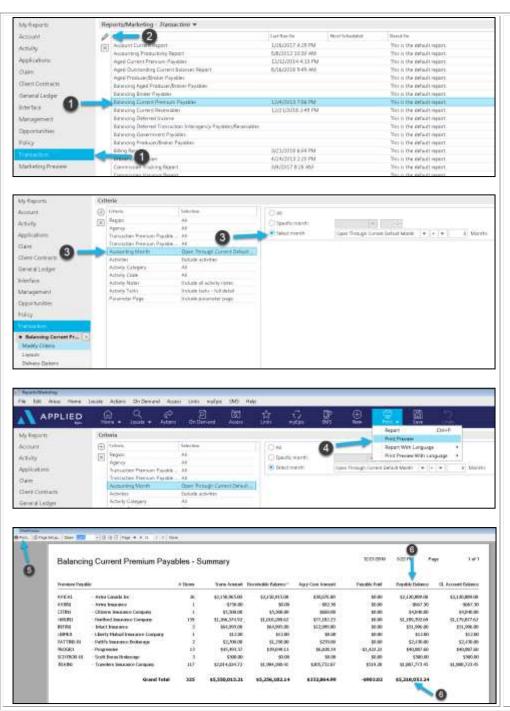
Total Aged Receivables (excluding Prebills & Futures):

- From Reports/Marketing > Transaction, select Balancing Current Receivables report.
- 2. Edit report and Modify Criteria.
- Select Accounting Month criterion. Select month as "Open Through Current Default Month" + 0 Months. (Adjust +/- as needed to complete BPS requirements.)
- Select Age Date criterion. Select System date + 0 days option. (Adjust +/- or select specific date as needed to complete BPS requirements.)
- From the options bar, select Print > Preview to view your report on screen. This function is available for all reports. (Sample report shown)
- 6. You can use the Print function from the viewed report if you need physical copies.
- The last page of the report includes the total without Prebills or Futures.

Total AR 61-90 and Over 90:

 This detail is included in the "Balancing Current Receivables" report above.





Insurance Company Payables (excluding Prebills/Futures):

- From Reports/Marketing > Transaction, select Balancing Current Premium Payables report.
- 2. Edit report and Modify Criteria.
- Select Accounting Month criterion. Select month as "Open Through Current Default Month" + 0 Months. (Adjust +/- as needed to complete BPS requirements.)
- From the options bar, select Print > Preview to view your report on screen. This function is available for all reports. (Sample report shown)
- 5. You can use the Print function from the viewed report if you need physical copies.
- 6. The last page of the report includes the total without Prebills or Futures.



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GL Account Detail

NOTE: If income items in the Income Statement need to be broken out in order to provide the BPS detail, use the 'Status of Account' report to obtain

- From Reports/Marketing > General Ledger > Status of Accounts, click Actions > Copy Report To.
- 2. Check 'My Reports' box.
- 3. Provide Comments if desired.
- 4. Click 'Finish'.
- 5. Edit the Status of Accounts report in My Reports.
- Stay on Modify Criteria screen. Edit Accounting Month criterion and select Range radio button. The range should reflect year being reported on (i.e. Jan 2018 – Dec 2018).
- Edit GL Account criterion and ensure 'Include selection' radio button is selected.
- 8. Initially move all accounts up into the Selected list.
- 9. Select which accounts you need to break out items for the BPS and move them into the Selected list. Note: you can filter for specific account types (i.e. income or expense) and use the double down arrow to move all accounts or multiselect and use the single down arrow to move specific accounts.



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REVENUE DETAIL TAB

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Revenue Detail tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aid will use the Production and Production Ranking reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

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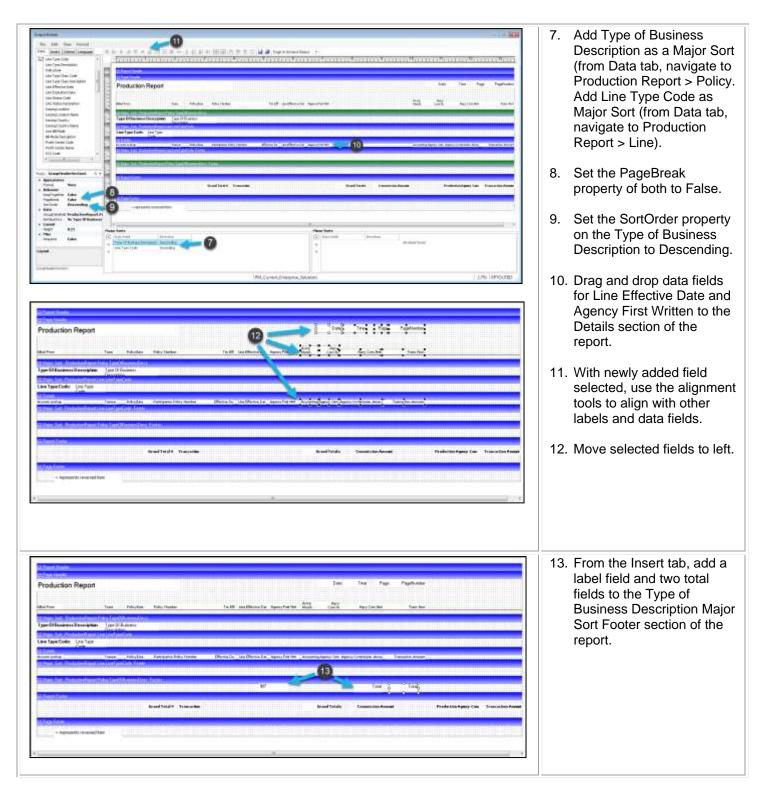


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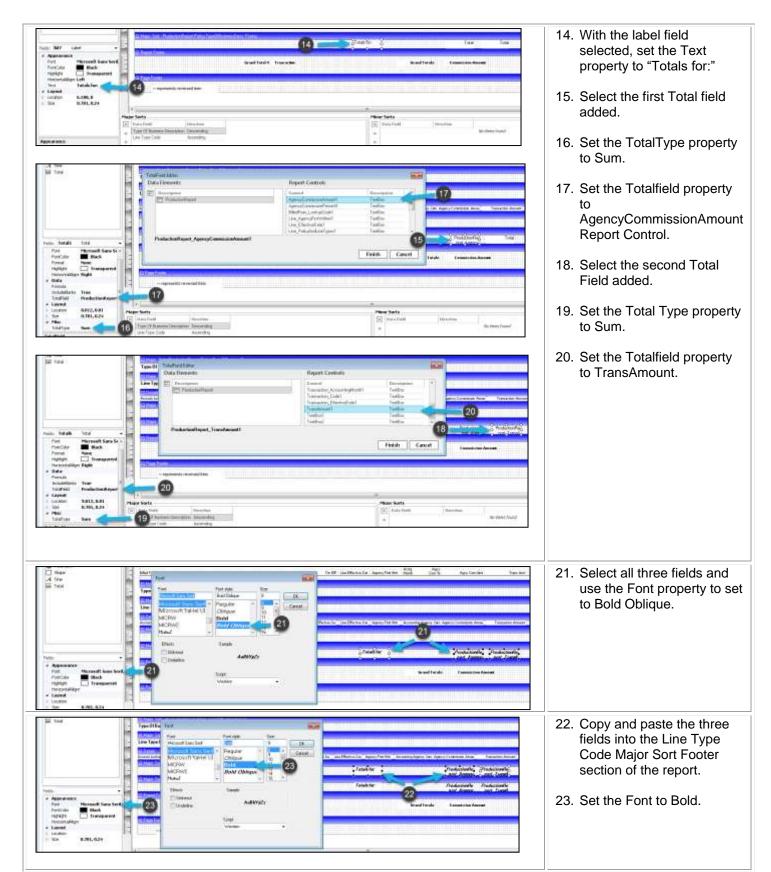


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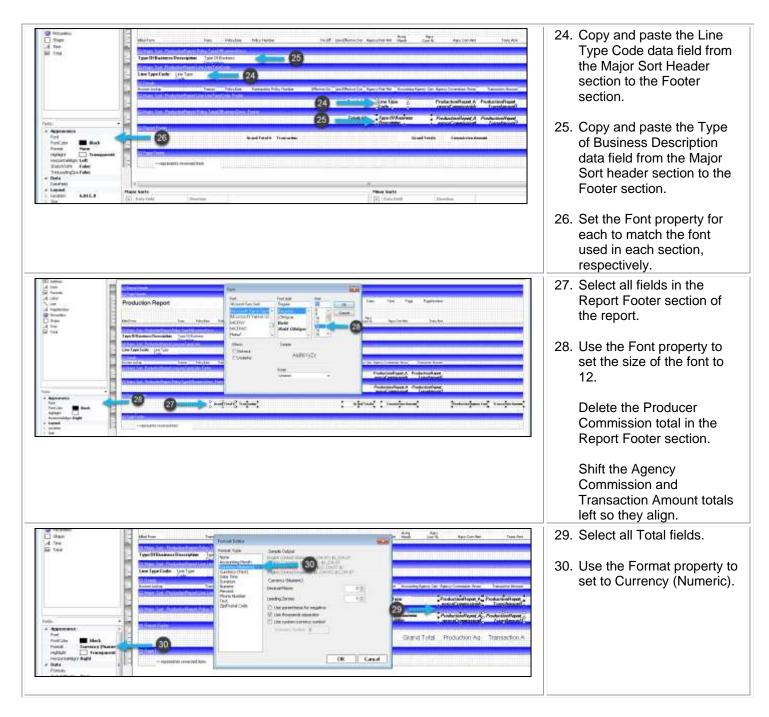




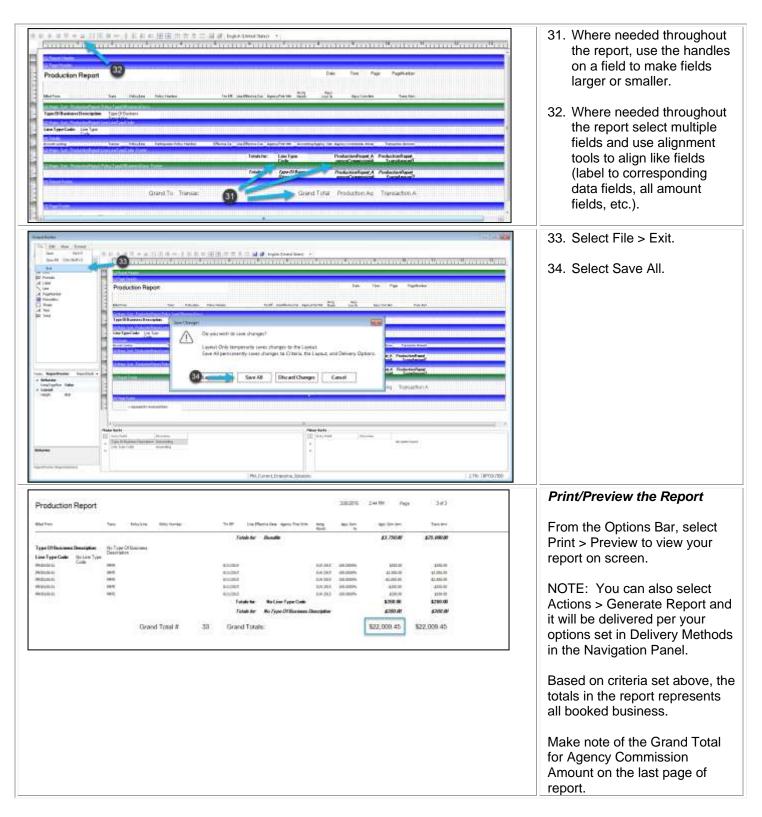














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Modify the Report Criteria

- 1. Select Modify Criteria from the Navigation Panel.
- 2. Select the Transaction Line Status criterion.
- 3. Remove all selections from the Selected area.
- 4. Select all statuses that represent New business and move to the Selected area.

Print/Preview the Report

From the Options Bar, select Print > Preview to view your report on screen.

NOTE: You can also select Actions > Generate Report and it will be delivered per your options set in Delivery Methods in the Navigation Panel.

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Use the 'Totals for Type of Business' line to determine the total agency commission earned for that type of business.

Enter requested data in the Best Practices Survey

Use the Grand Total noted from the original run of the report and the individual Type of Business totals to determine the New % entries for each major type of business.



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Modify the Report Criteria

- 1. Select Modify Criteria from the Navigation Panel.
- 2. Select the Transaction Line Status criterion.
- 3. Remove the New business codes selected for previous report from Selected area.
- 4. Select all statuses that represent renewal business and move to the Selected area.

Print/Preview the Report

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NOTE: You can also select Actions > Generate Report and it will be delivered per your options set in Delivery Methods in the Navigation Panel.

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Use the Totals for Type of Business line to determine the total agency commission earned on Renewal business for that type of business.

Enter requested data in the Best Practices Survey

Use the Grand Total noted from the original run of the report and the individual Type of Business totals to determine the Renewal % entries for each major type of business.



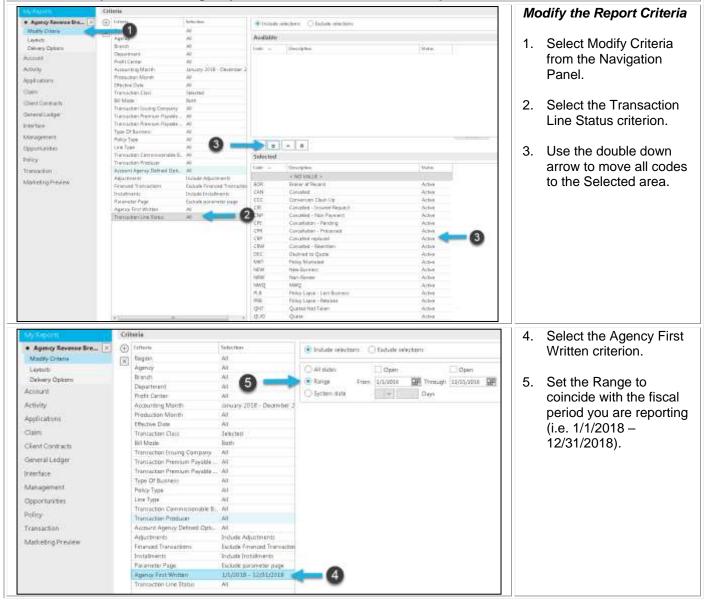
For this last run, we are looking to obtain the total agency commission percentage for Acquired business as defined in the collection file.

Depending upon your system configuration this can be obtained one of two ways:

- 1. You may have Line Status Codes defined and used to differentiate brand new business with new clients to your organization from new business with existing clients (i.e. "NEW" to denote new business from brand new clients and "NWB" to denote new policies or business with an existing client)
- 2. Using the Agency First Written date

If you have separate Line Status Codes to differentiate new business with brand new clients from new business with existing clients, follow the steps outlined above to select just the applicable line status codes and run the report to obtain the figures as previously shown.

To obtain Acquired % from Agency First Written date follow the steps below.





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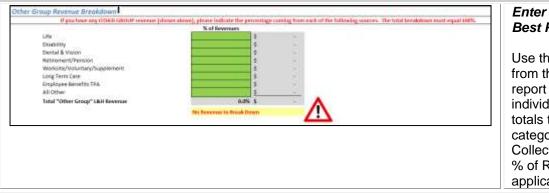
Revenue Breakdown

Other Group Revenue Breakdown

This section can be completed using the same report generated for the previous section with a modification to the report criteria to focus on either the Type of Business or Policy/Line Types that reflect the categories provided in the Collection File

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Enter requested data in the Best Practices Survey

Use the Grand Total noted from the original run of the report and the applicable individual Line Status Code totals that coincide with the categories requested in the Collection file, determine the % of Revenues for each applicable category.



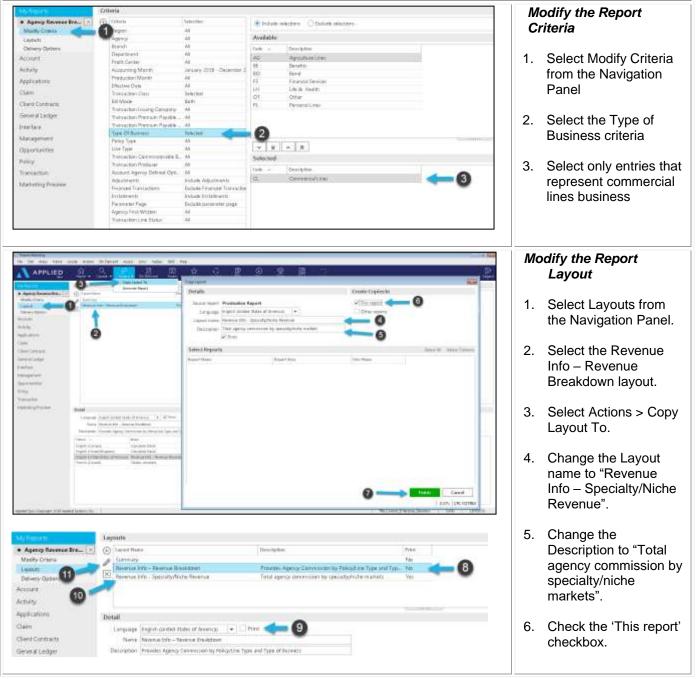
Steps

Revenue Breakdown

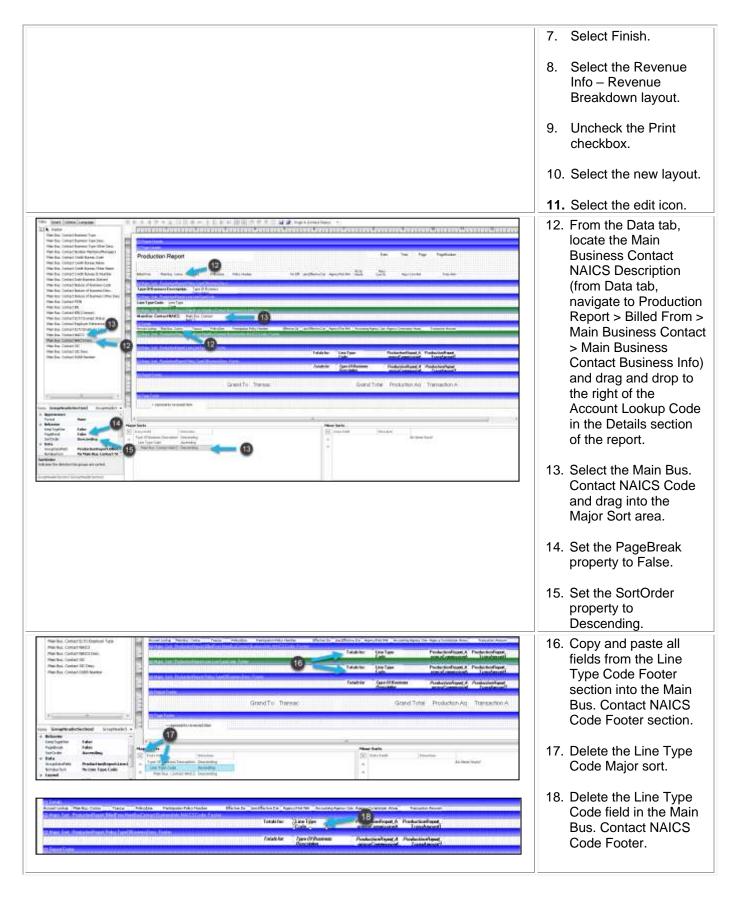
Specialty / Niche Revenue

There are multiple ways to track specialty or niche markets in Applied Epic. The below instructions are applicable when the SIC or NAICS codes on the Main Business Contact records on commercial accounts are used.

We will use the same report created for the other sections above, modifying the criteria and creating a new layout.



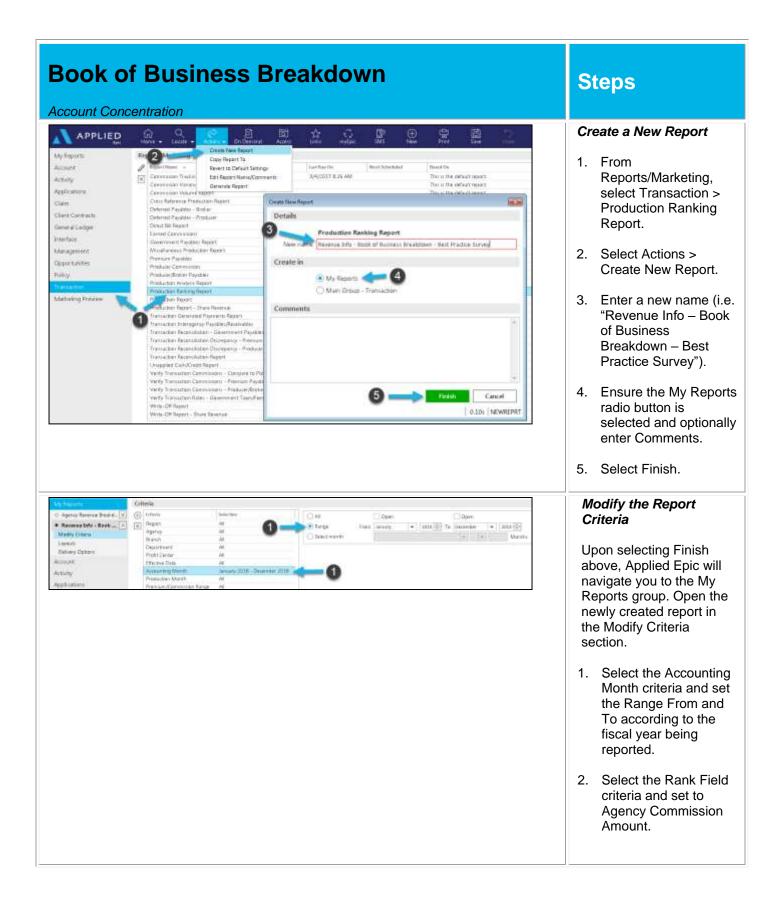




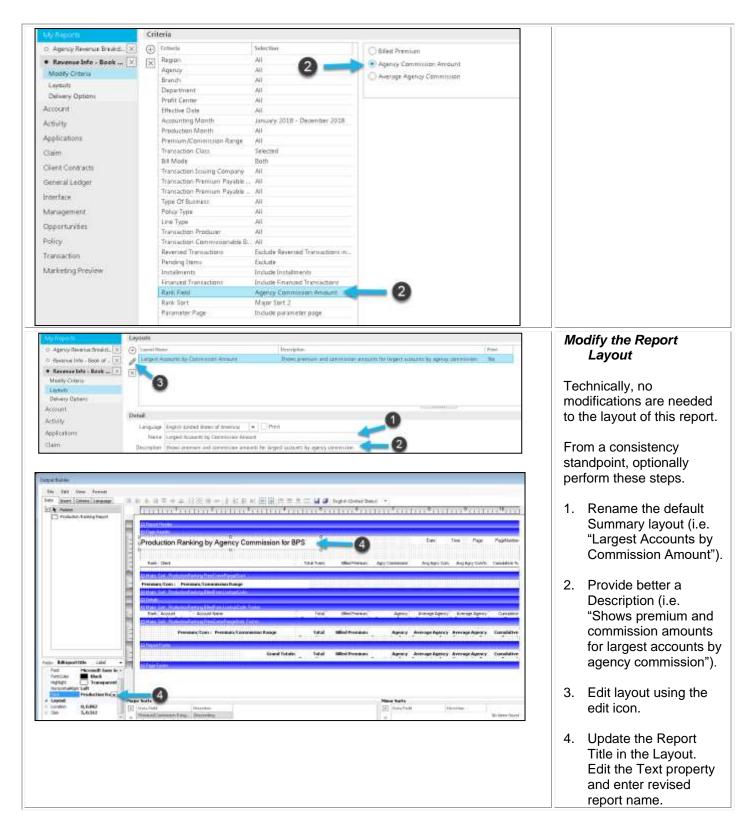


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2 DAVICHARZ	· Oarde Canapp	1	817,506.89	\$2,425,41	81,512,50	15.08%	405
3 04040039-63	- Crowe Construction	E.	\$7,777.08	81,559.40	81,555.40	20.00%	879
4 ECONK00-81	- Sconsmical Roofing and Supple	10	\$10,000,00	\$1,590.00	\$1,509.00	15.02%	679
\$ BOHSROD-81	- Boye Roofing & Construction, Inc.	3	\$14,000.00	\$1,400.00	8708.00	10.00%	379
6 ROMACON-01	- Roman Construction	1	an,taolos	\$1,225,08	4512.50	12,09%	840
7 GANTCHR-52	- Otriatiun Devictore	2	85,485.00	\$810.09	8405.00	15.09%	807
8 R0PR308-01	· Refrigeration Services of Westersin (2.0	12	\$4,530.03	\$175.01	\$575.00	15.01%	10
a dnarcowat	 Quality Constituation Company, Inc. 	E	\$2,080.08	\$205.01	\$208.05	15,09%	805
19 0000000001	- Michael & Lewis Beck	1	\$2,050.08	\$205.01	8002.85	10.00%	987
11 FOXIANNES	- Jatet Fox	10	\$2,080.08	\$216.00	8208.00	10.00%	997
12 BURNETEORI	- Jaff Burke	- E	81,380.00	\$125.00	8528.80	10.09%	100%
	Premium: All		\$98,258.00	\$14,359.45	\$755.76	14.61%	388%
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2 DAVIDHA-62	+ Ovasdiardiavidation	1	817,506.00	\$2,620,00	81,312.00	15.09%	447
3 090400642	+ Crows Coopyrughts		\$7,777.04	\$1,555,40	\$1,515,40	20.00%	17

-	by Agency Commission for							
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Premium: All								
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	(Clavidade)	1	817,506.85	\$2,425,43	81,312,37	25.08%	4956	
	oogtvettiee	E	\$7,777.08	\$1,555.40	\$1,355.40	20.09%	87%	
4 ECONROD-R1 Sconart	cal Roofing and Supply	1. L. L.	\$10,000,00	\$1,592.88	\$1,505.00	15.08%	67%	
S BOHSROD-BL - Boye Ro	offeg & Countraction, Inc.	2	\$14,000.00	\$1,400.00	8708.80	10109/16	37%	
6 ROMACON-01 + Roman	Construction	1	80,530.05	\$1,825.08	4512.50	(2.68%	84%	
7 GAVIEHR-62 - Oriette	1 D-ex-idition	2	10,084,23	\$810.09	8405.00	15.08%	80%	
8 REPRER 11 Aufrige	etion Services of Wisconsin (2.1)	12	\$4,580,08	\$675,01	\$475.88	15.09%	105	
a dharcowat - desian	Constituation Company, Inc.	E.	\$2,080.08	8306.08	\$308-85	15,09%	9976	
19 BECKITEROEL - Michael	6 Lewie Beck	1	\$2,650-08	1516.11	8102.85	10.00%	98%	
11 POXIMINES - Janet Fr	*	1	\$2,080.08	\$210.00	8208.80	10.00%	9976	
42 BURRETEORI - 147 Bur	18	L	81,380.00	#426.88	8426.00	10.09%	189%	
Prepiers	AB		999,258.00	\$14,359.45	\$755.76	14.61%	320%	
	Second Total	u 19	\$98,258.00	\$14,359.45	\$755,76	14.61%	388%	
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f Business Breakdown								Enter requested data
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as other the pression and con	entration information below for your agen president) sturing the last (by total unreast of	Committeeines (WCC)	Survey
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Print/Preview the Report

From the Options Bar, select Print > Preview to view your report on screen.

NOTE: You can also select Actions > Generate Report and it will be delivered per your options set in Delivery Methods in the Navigation Panel.

- 1. The first entry on the report Rank 1 will be the Largest single commission Account.
- 2. Manually calculate the first 10 rows to get the Ten largest commission accounts (totaled).

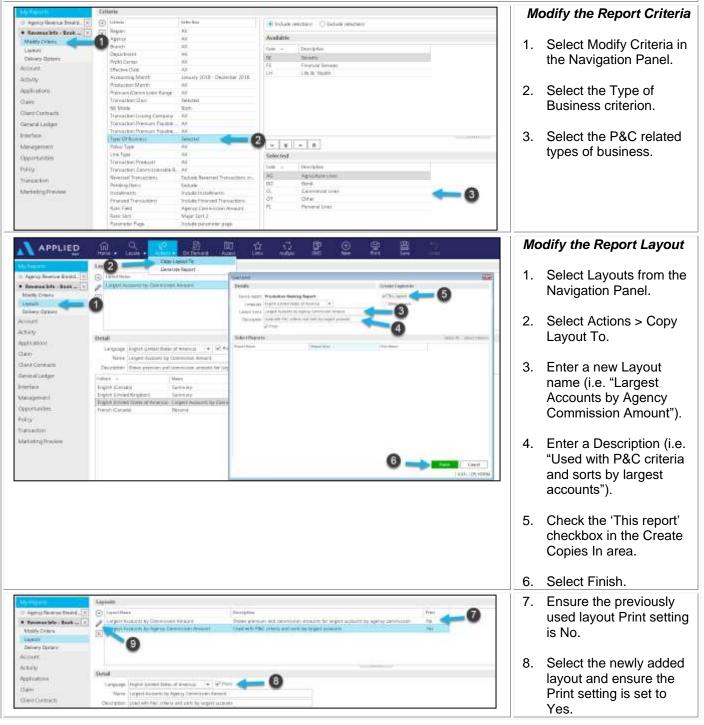


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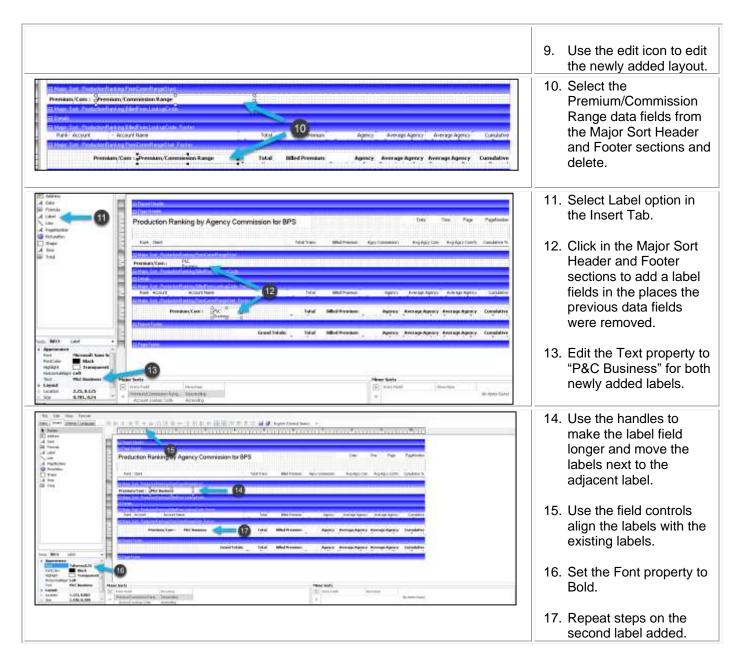
Book of Business Breakdown

Number of Accounts by Account Size

The same report and basic layout can be used to obtain the Agency Concentration information above will be used to populate the Number of Accounts by Account Size using criteria to separate P&C from Group Life and Health/Financial information.



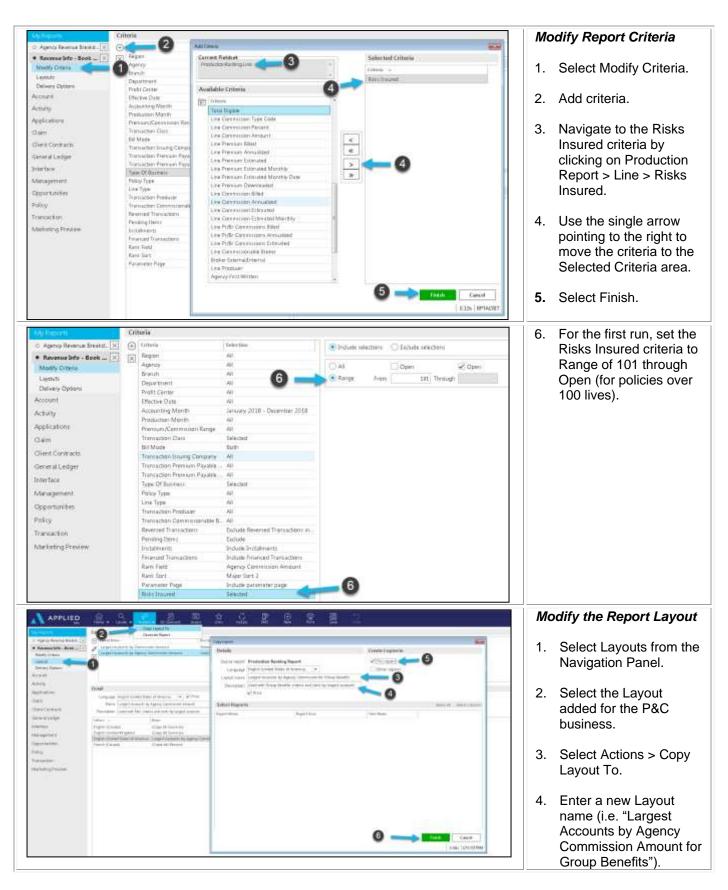




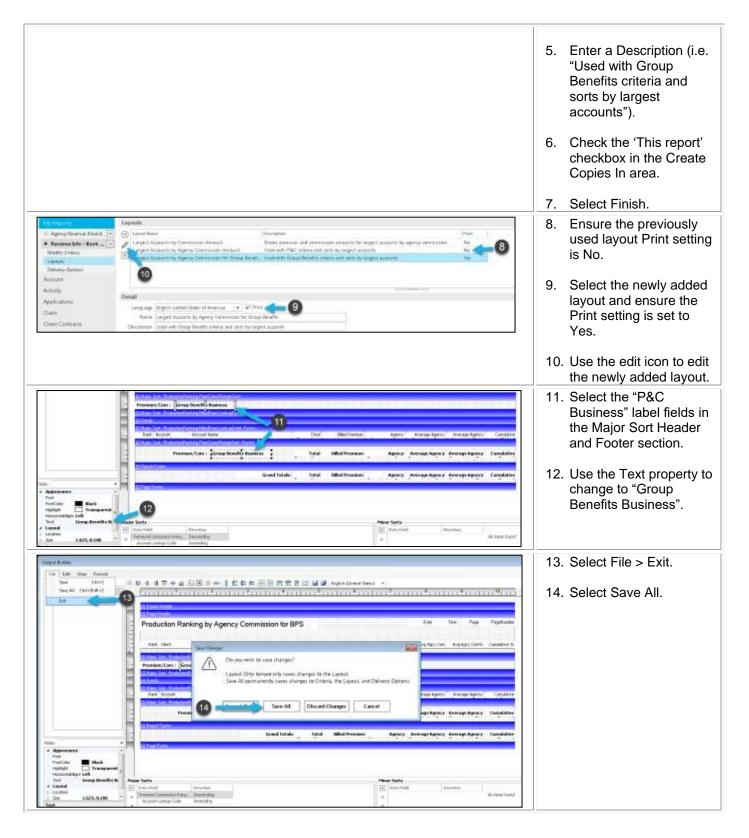


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3 DRXICHA-IZ # CROWCOM-IZ	- DasdarDavidson - Dove Contractice	2	47,777.00	\$2,625.00	\$1,312.50	25.00%	54%	NOTE: You can also sele
S ECONROD-11	- Doverney Roofing and Supply		\$30,000,000	\$1,500.70	\$1,500.00	15.00%	725	Actions > Generate Repor
8 0015R00-81	Bays Roofing & Construction, Inc.	2	824,010.00	\$1,400.00	8705.00	30.08%	79%	
7 NOMACON 01	Harriel Construction	2	(0.500.HT	\$1,825,01	8512.50	12.08%	6976	and it will be delivered per
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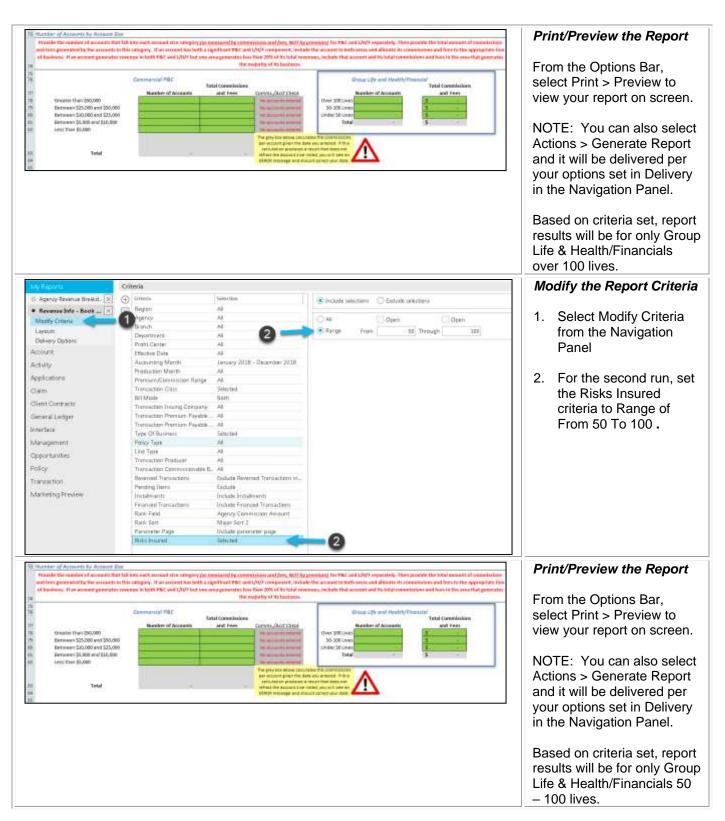




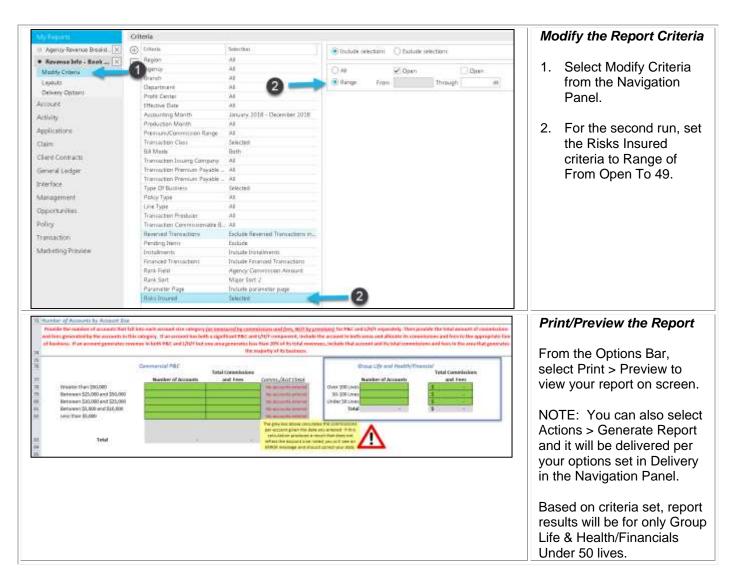












PRODUCER INFO TABS

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Producer Info DATA ENTRY tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

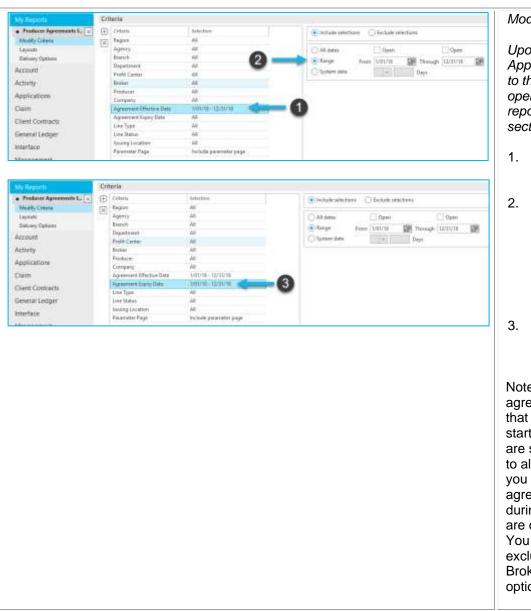
This Job Aid will use the Broker/Producer Commission Agreement, Commission Volume, and Employee List Reports. It is important that you begin with default version of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

Agency	Commission Structure	Steps
Tile Ell Anni Henry C APPLIED Common Activity Applications Client Contracts General Ledger Interface Management Opportunities Bolicy Transaction Marketog Preview	Active OxDevand Active Lake option 200 Mag Text Control Inter Control I	 Create a New Report Once in Reports/Marketing area, select Account > Producer/Broker Commission Agreements Report Select Actions > Create New Report Enter a name for the report (i.e. Producer Agreements for Best Practice Survey (BPS))
	Conserver ANEGO - APPLICE Conserver	 Select the 'My Reports' radio button Optionally enter a Comment that describes the use of this report, in this case Producer Agreements for Best Practice Survey Select 'Finish'





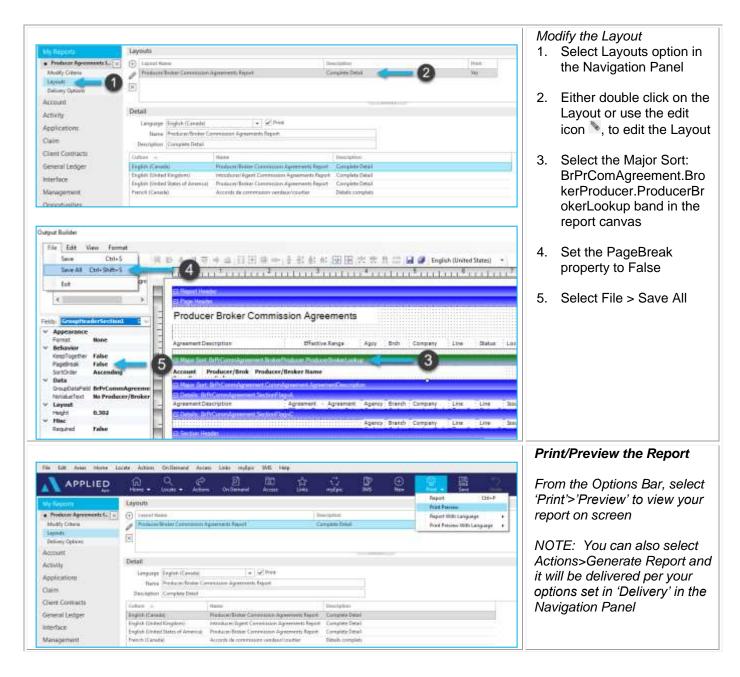
Modify the Report Criteria

Upon selecting Finish above, Applied Epic will navigate you to the My Reports group, open the newly created report in the Modify Criteria section

- 1. Select Agreement Effective Dates
- Modify criteria by selecting the Range radio button and entering the previous fiscal year in the From and To (unchecking the Open checkboxes if needed)
- 3. Repeat with criteria Agreement Expiration Dates

Note: If you have agreements for Producers that were effective prior to the start of this fiscal year and but are still in force, you will need to alter the Ranges to ensure you are capturing all agreements that were in force during the fiscal period you are completing the survey for; You may also need to exclude Brokers using the Broker/Exclude selections option



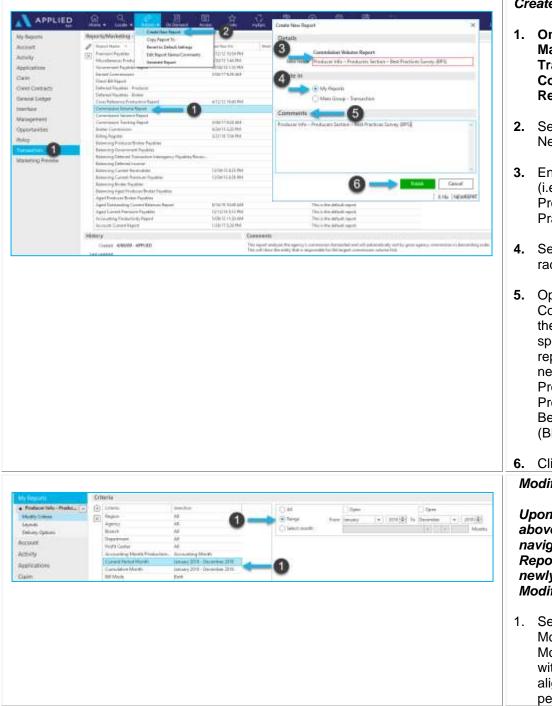




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Producers



Steps

Create a New Report

1. Once in Reports / Marketing area, select Transaction > Commission Volume Report

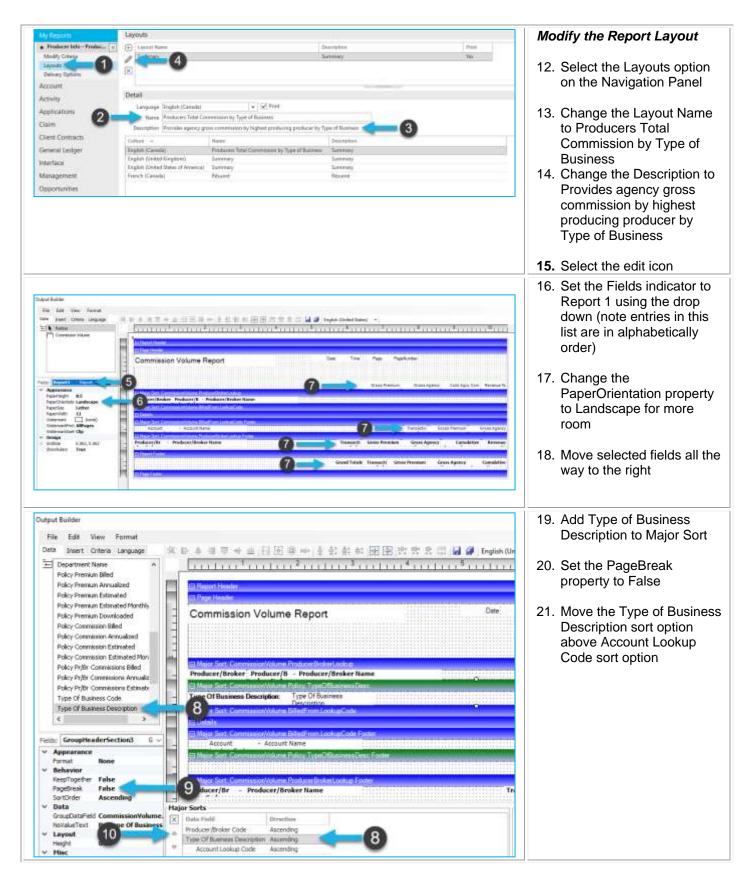
- 2. Select Actions>Create New Report
- Enter a name for the report (i.e.; Producer Info – Producers Section – Best Practices Survey (BPS))
- 4. Select the 'My Report' radio button
- 5. Optionally, enter a Comment that describes the use of this report, specifically (example: This report will produce data necessary to complete the Producers section of the Producer Info tab for the Best Practice Survey (BPS))
- 6. Click 'Finish'

Modify the Report Criteria

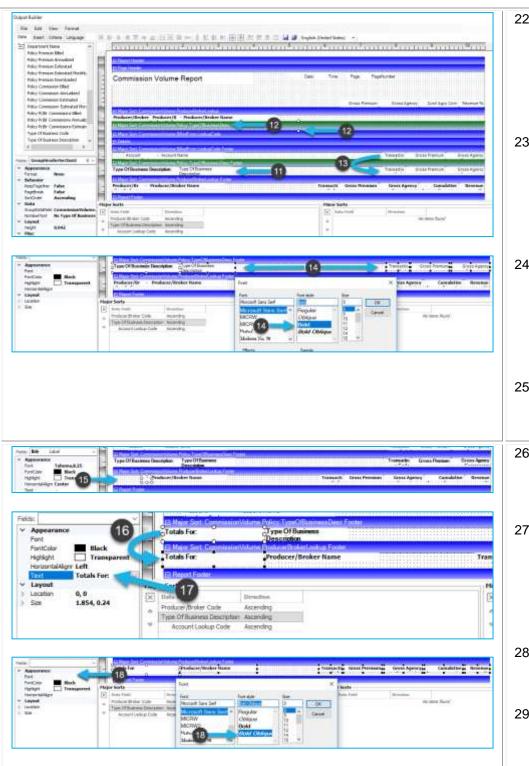
Upon selecting Finish above, Applied Epic will navigate you to the My Reports group, open the newly created report in the Modify Criteria section

 Set both the Current Period Month and Cumulative Month criterion to Range with the From and To aligning with the fiscal period being reported



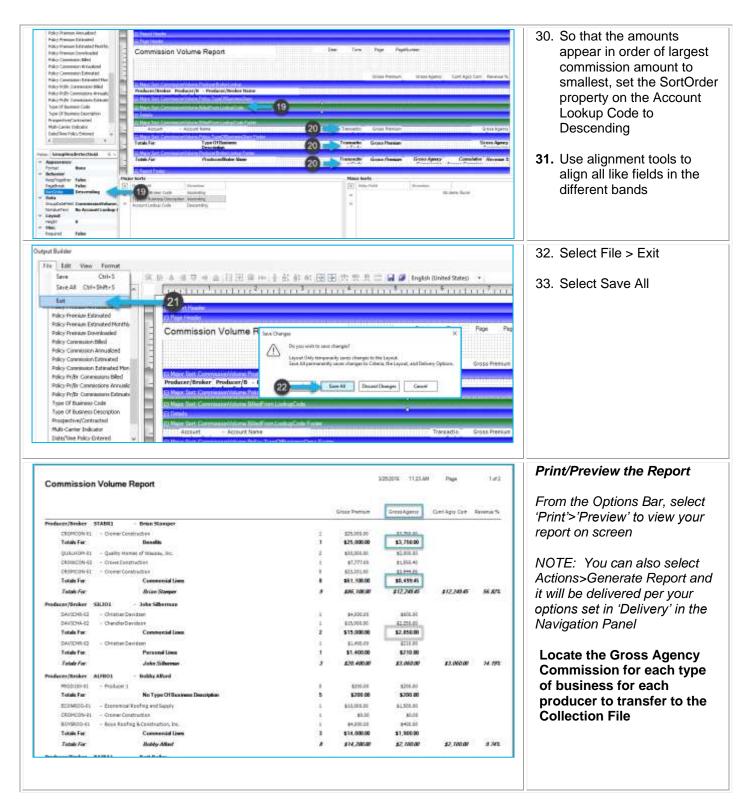




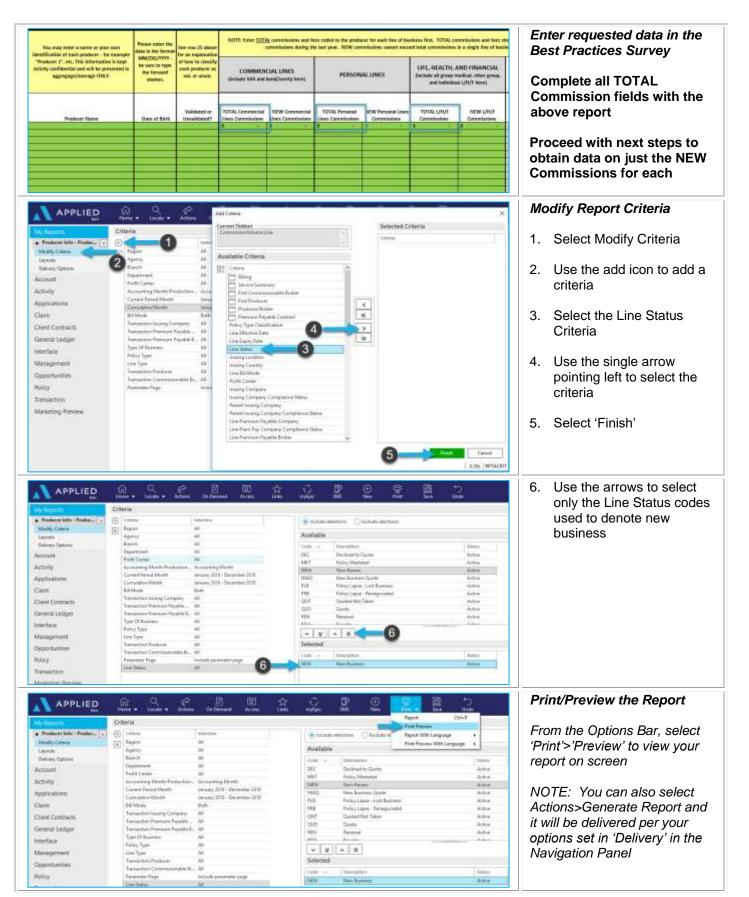


- 22. Move the Type of Business Description label and data field from the Major Sort CommissionVolume.Policy. TypeofBusinsessDesc band to the same Major Sort's footer band
- 23. Click on Major Sort CommissionVolume.Policy. TypeofBusinessDesc band and use handles to shrink the band by clicking on the bottom handle and dragging it up
- 24. Copy and paste 3 data fields for Transaction Code, Gross Premium, and Agency Commission from Lookup Footer to Type of Business Description Footer
- 25. Select all fields in the Type of Business Footer and use the Font property to make them all Bold
- 26. Delete the ProducerBroker Lookup data field and hyphen label field in the Lookup Footer
- 27. Copy and paste the Types of Business Description label from the Types of Business Description Footer into the ProducerBroker Lookup Footer
- 28. Change the Text property on both these label fields to Totals For
- 29. Change the font for all fields in that row to Bold Oblique for better definition between total lines









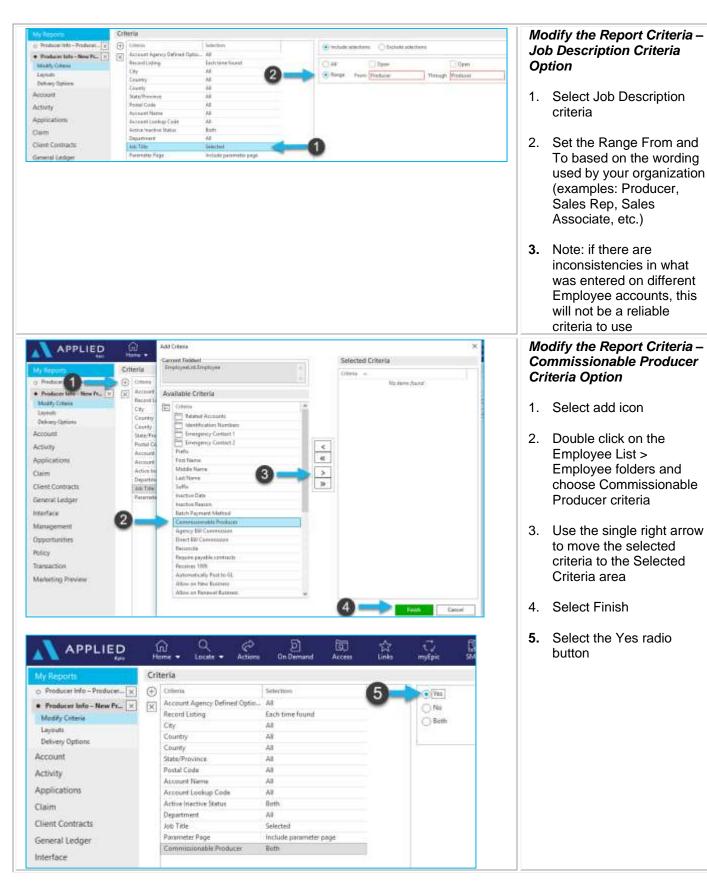


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CROMCON-41 - 0					3 814.440.0				equate to only commission
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Producer/Broker AU/D	001 - Sebby Alford								business
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Talats For:	Bobby Alter				2 \$14,000	at \$1,000 a	\$1.900.0	12.70%	producers appear in the
Producer/Broker BAIB	IAZ - Bart Salley								
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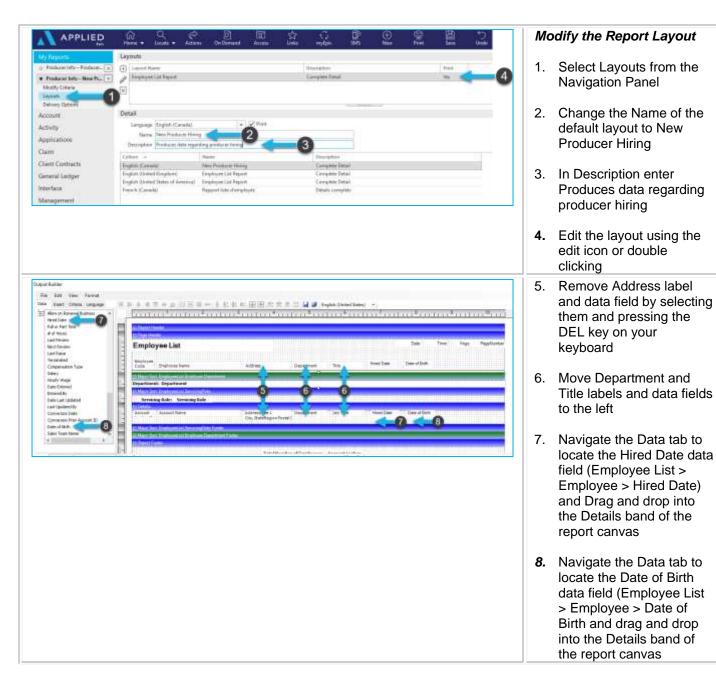


New Producer Hiring Steps Create a New Report APPLIED 1. Once in Reports / Marketing area, D et to fieleut 5 Create New Report select Accounts > 100 Seport Harry Co. imand a Report Details COUNTRACTOR STOCTO LATINA STOCTO LATINA STOCTO LATINA STOCTO LATINA STOCTO LATINA Applicat **Employee List** Care Imployue the 3 **Ciert** Contracts Report Central Ladger Create In interface. · 10, 10 2. Select Actions>Create Management 122123121044 O Main Brese Opports New Report Policy Comments Trania This report will produce an block process of the Product Maiketing Pr 3. Enter a name for the report (i.e.; Producer Info - New Producer Hiring Section for Best Practice Carlord Survey (BPS)) 0.171 NEWREERT Water Dealer ADM/09 APPLIED (had to obtain a 4. Select the 'My Report' Latranian . radio button 5. Optionally, enter a Comment that describes the use of this report specifically (example: This report will produce a report with data necessary to complete the New Producer Hiring section of the Producer Info tab for the Best Practice Survey (BPS)) 6. Click 'Finish' Modify the Report Criteria There are two options for obtaining the report needed for this section: using the Job Description criteria or using the Commissionable Producer criteria Use the option based on how your organization has used these fields in the Employee Account files

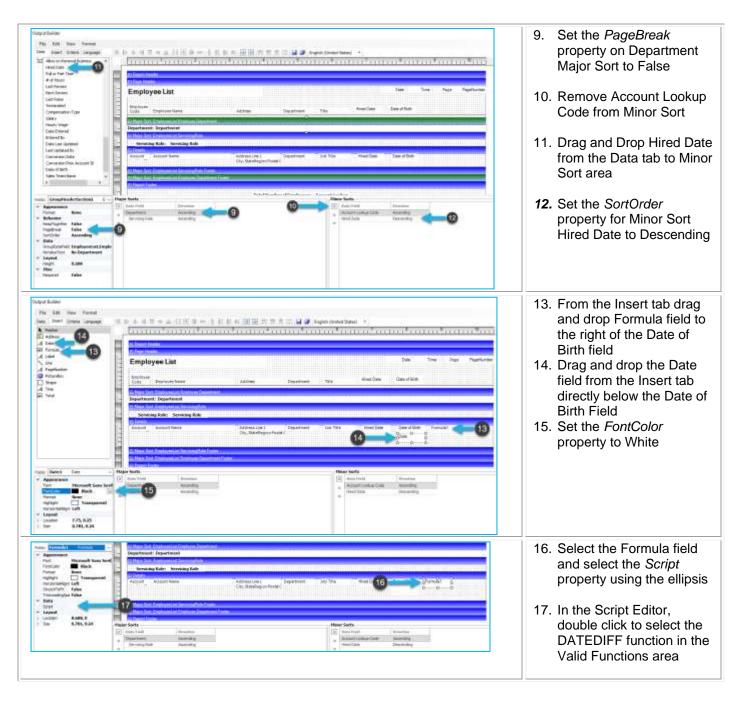




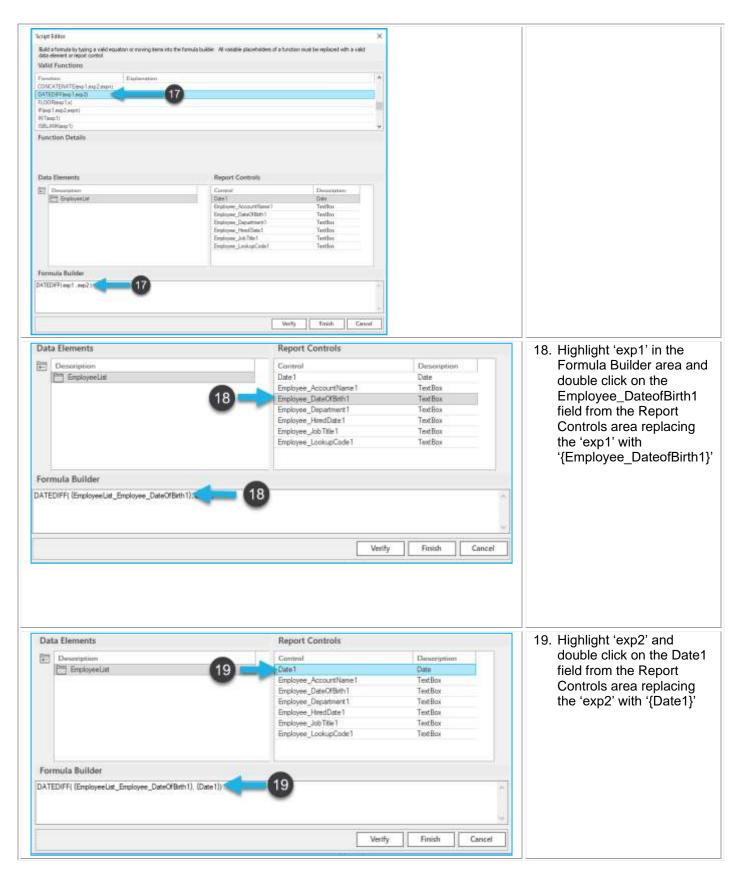














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er Produzer Hirling 1 many producers did you hite during your mu	at nextly completed fluc	Note: Each a	tf theme producers standed he lister by he included if they are still eco	played by the ages		no	Enter requested data in the Best Practices Survey
Scate the number of newly bloed producers th	tat fit the following criteria	the total number of prod	score described have must match	100			
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Steps

Recruiting and Development Techniques

Recruiting and Development Techniques	Enter requested data in
Please indicate whether your agency uses the recruiting and development tools/techniques indicated below in its hiring and development of new producers. Click on the arrow to the right of each cell to choose YES or NO from the drop-down menu in each green cell.	the Best Practices Survey Unless your organization used Agency Defined
Recruiting Targeted college recruiting efforts/programs Use of outside recruiters Use of social media as a recruiting tool Assessment Testing (sales, personality, intelligence capabilities, call reluctance, etc.) Development	Categories/Codes to track this information on Employee Accounts, the information for this section will need to be obtained manually or from
Internship Mentorship Technical training Internal Sales training	another source
Selling structure Required specialization Team selling Assigned accounts	

STAFF AND TECHNOLOGY TAB

The following is provided to assist in producing reports from the Applied TAM system necessary to complete the Staff & Technology DATA ENTRY tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aide will use an Employee File Search.

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Staff and Technology DATA ENTRY tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey. This document contains job aids that coincide with the following sections of this tab in the Collection File:

- Agency Staff Breakdown
- Service and Sales Staff Breakdown
- Employees Working Remotely

This Job Aid will use the Employee List and General Ledger Register reports. It is important that you begin with default versions of these reports. If you have modified the default version of these reports, you will want to save your versions as a new report so that you can revert back to the default version of these two reports.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

Ageno	cy Staff Breakdown	Steps
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	Element Element Tuner 495005 Mill Models in Planck in Vision Clin Vision Cli	 5. Optionally, enter a Comment that describes the use of this report, specifically a. In this case, "Employee List-Agency Staff Breakdown for Best Practice Survey (BPS) 6. Click 'Finish'

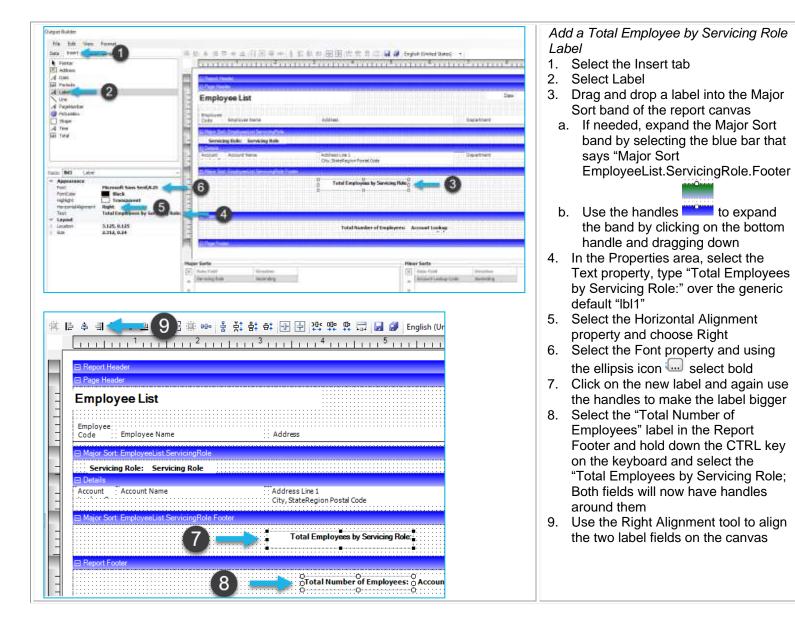


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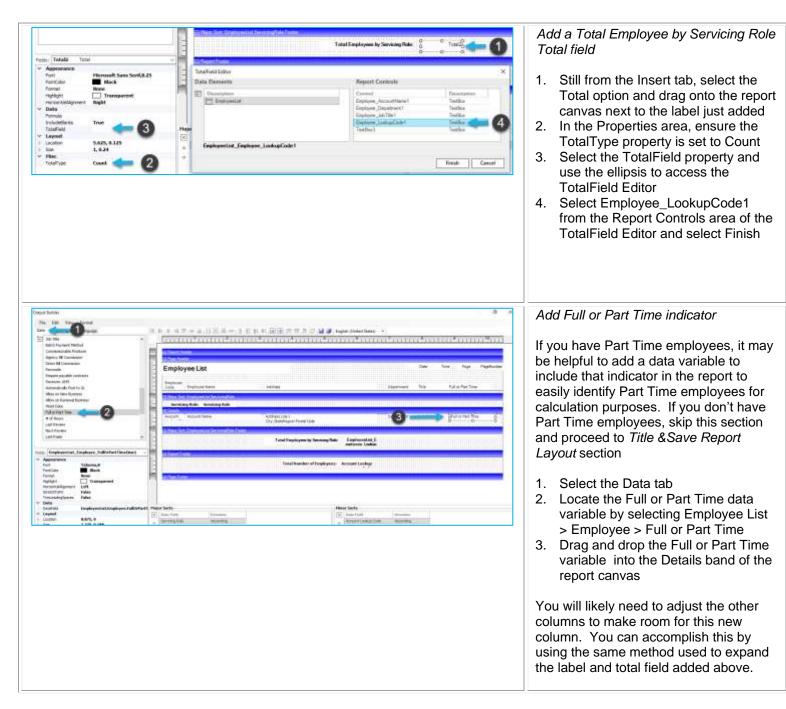


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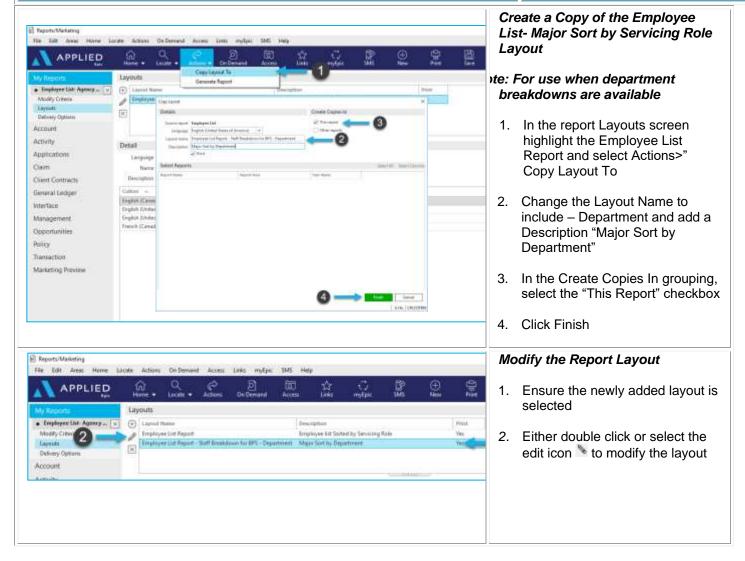
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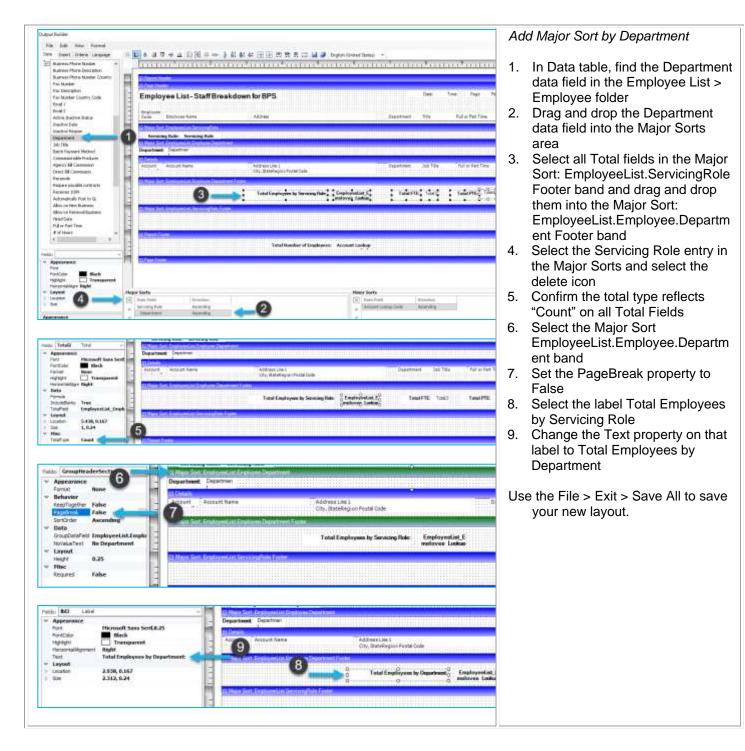
Service & Sales Support Staff Breakdown

Steps

Number of SSS Staff









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Services & Sales Support Staff Breakdown

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Steps

Sales Support Staff Payroll Breakdown Information

Note: If payroll entries are processed in Epic, using the "General Ledger Register Report" will allow you to capture Gross Payroll and Bonus information for the most recent fiscal year end and provides options to add a Major sort by Department, if Departments are available.

Manual Entry may be required in this area if payroll information is not available in Epic.

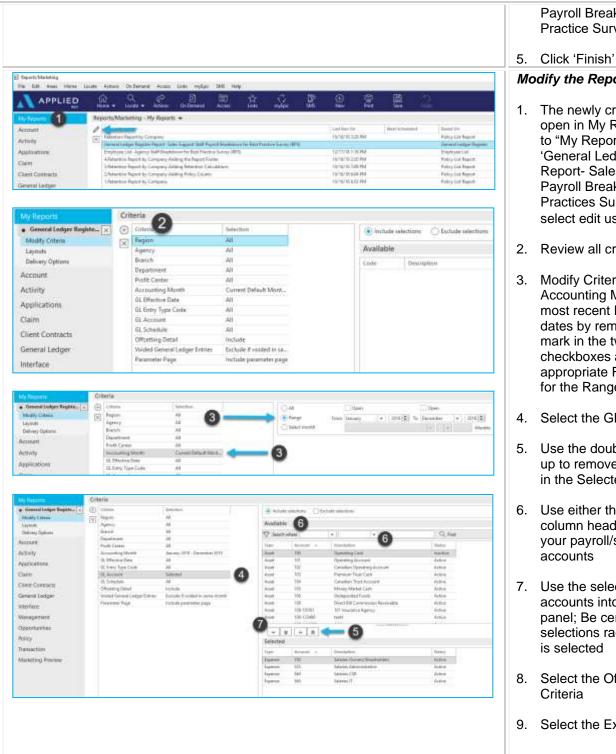
> Create a New Report from the General Ledger Register Report

From Home Base select Reports/Marketing

General Ledger Register Report

- 1. General Ledger> General Ledger Register Report-select Actions>Create New Report
- 2. Enter a name for the report (i.e.; General Ledger Register Report- Sales Support Staff Payroll Breakdown for Best Practice Survey (BPS).
- 3. Check the "My Reports" radio button
- Optionally, enter a Comment that describes the use of this report, specifically. In this case, "General Ledger Register Report- Sales Support Staff





Payroll Breakdown for Best Practice Survey (BPS)"

5. Click 'Finish'

Modify the Report Criteria

- 1. The newly created report should open in My Reports but if not, go to "My Reports", Highlight 'General Ledger Register **Report- Sales Support Staff** Payroll Breakdown for Best Practices Survey (BPS) and select edit using the edit icon >>
- 2. Review all criteria
- Modify Criteria for the Accounting Month to reflect your most recent Fiscal Year End dates by removing the check mark in the two Open checkboxes and selecting the appropriate From and To entries for the Range radio button
- 4. Select the GL Account Criteria
- 5. Use the double arrow pointing up to remove all current entries in the Selected area
- 6. Use either the Search where or column header sort to locate your payroll/salary expense
- 7. Use the selectors to move these accounts into the Selected panel: Be certain the Include selections radio button at the top
- 8. Select the Offsetting Detail
- 9. Select the Exclude radio button



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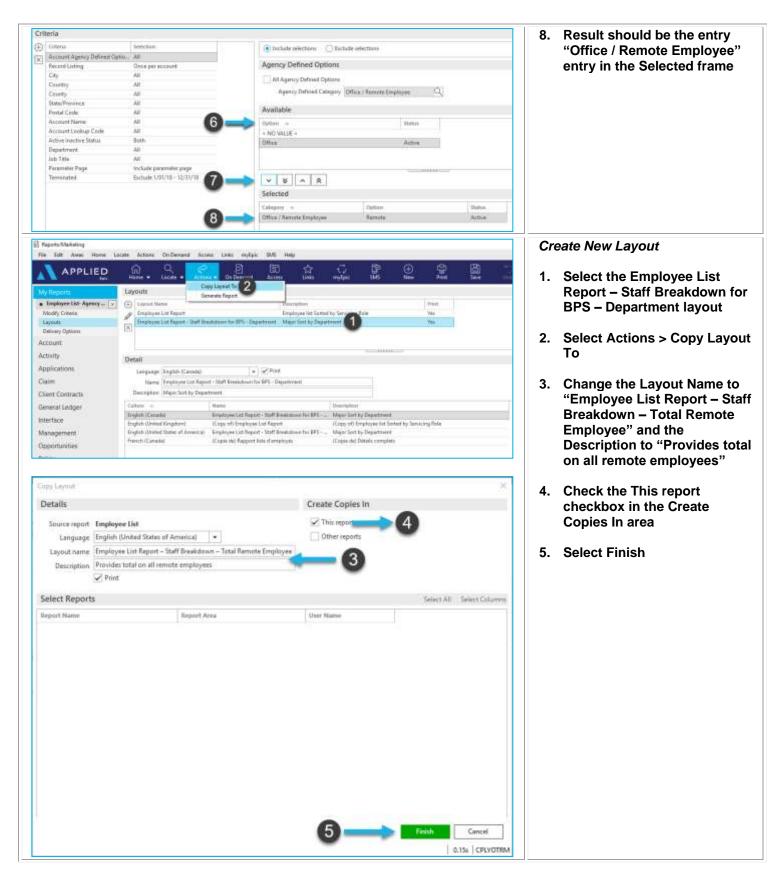


Steps

Employees Working Remotely

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CARRIER INFO TAB

The following is provided to assist in producing reports from the Applied Epic system necessary to complete the Carrier Info DATA ENTRY tab in the 2019 Collection File for the Reagan Consulting Best Practices Survey.

This Job Aid will use the Earned Commissions report. It is important that you begin with default version of the report. If you have modified the default version of the report, you will want to save your version as a new report so that you can revert back to the default version of this report.

To revert a report back to the default version:

- Select the report and
- Select Actions > Revert to Default Report

Agency Carrier Breakdown	Steps
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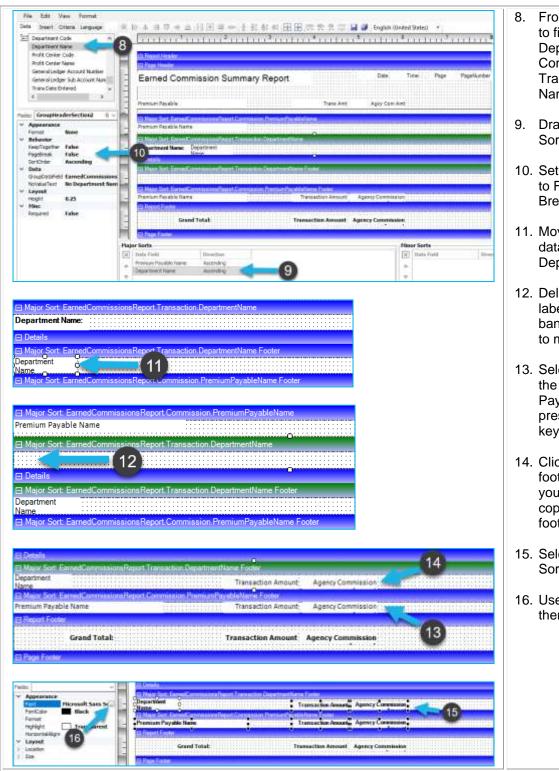


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- Select the Pr/Br Amt data field in the Major Sort band and press the DEL key on your keyboard to remove
- Select the Pr/Br Amt Total field in the Report Footer and press the DEL key on your keyboard to remove
- Select the Agcy Com Amt label, data and total fields and move to the left on the report canvas
- Increase the space in the area Major Sort: EarnedCommissionReport. Commission.PremiumPayable Name by selecting the bar and then using the handles

to adjust the size of the band

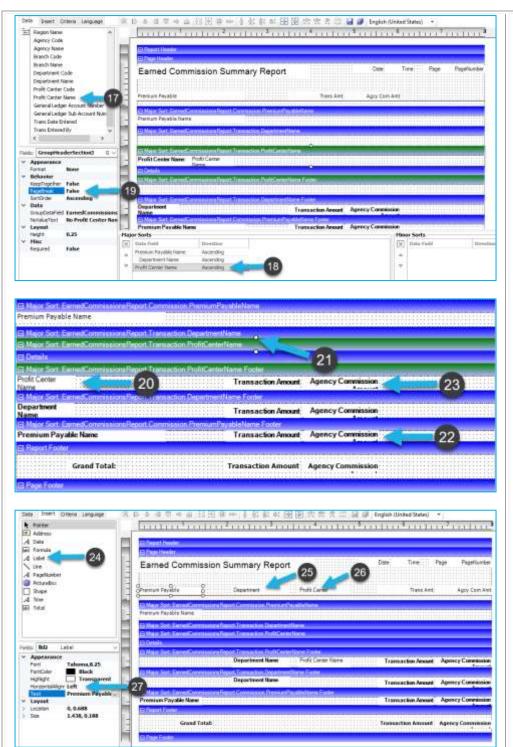
- Select the Premium Payable Name data field in the Major Sort: Earned CommissionsReport Comission.Premium PayableName Footer and press CTRL + C on your keyboard to copy it
- Select the Major Sort: Earned Commissions Report Commissions Premium Payable Name sort band again and press CTRL +V to paste the field in that area; Use arrow keys on the keyboard to move it over to the left as shown here





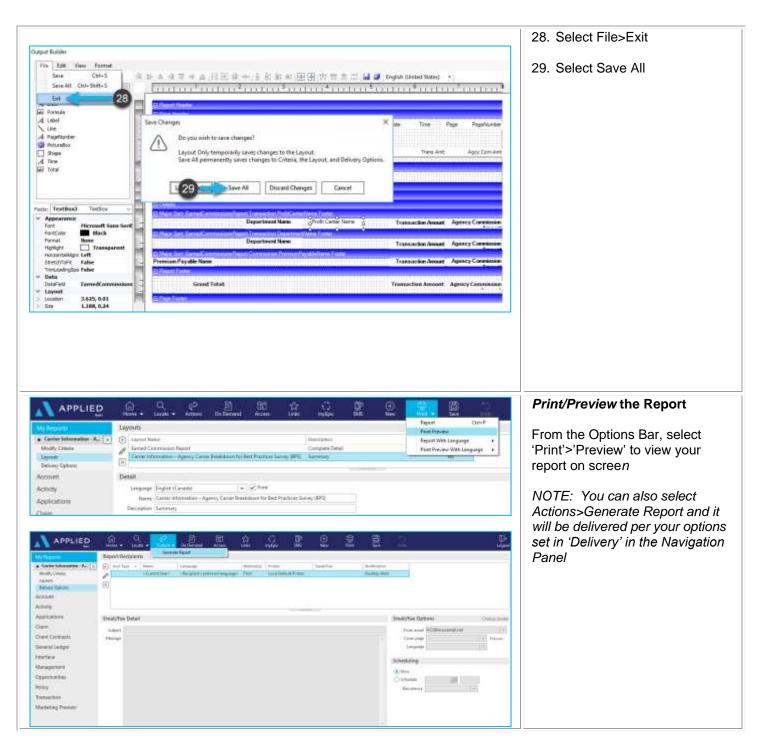
- From the Data tab, navigate to find Transaction Department Name (Earned Commissions Report > Transaction > Department Name)
- 9. Drag and drop into the Major Sorts area
- 10. Set the PageBreak property to False to remove the Page Break
- Move the Department Name data field down to the Department footer
- 12. Delete the Department Name label leaving the Major Sort band blank; Use the handles to minimize the white space
- Select the Total fields from the from the Premium Payable Name footer and press CRTL + C on your keyboard to copy the fields
- Click in the Department Name footer and press CTRL + V on your keyboard to paste a copy of these fields into that footer
- 15. Select all fields in both Major Sort bars
- 16. Use the Font property to set them to Bold



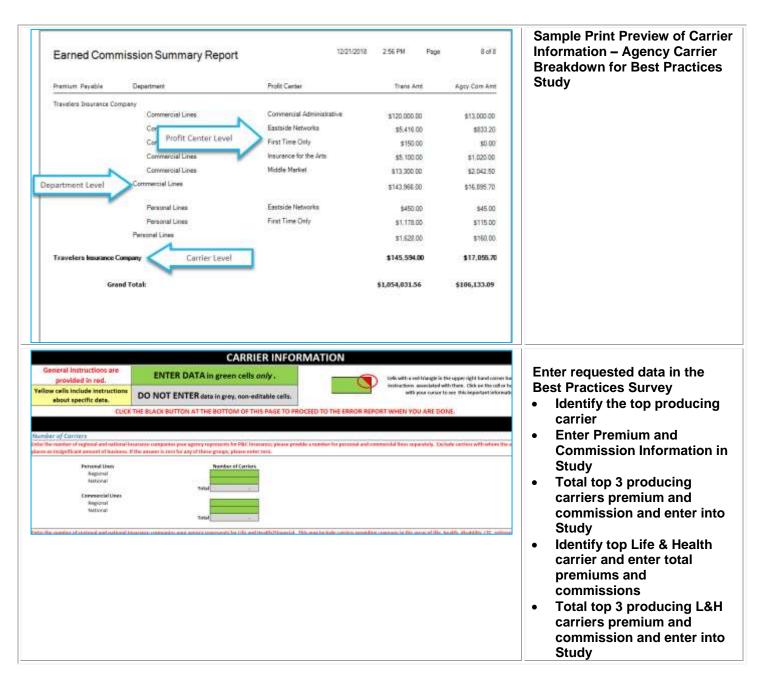


- 17. Select the Transaction Profit Center data field (Earned Commissions Report> Transaction> Profit Center Name)
- 18. Drag and drop to the Major Sort area
- 19. Set the PageBreak property to False
- 20. Move the Profit Center Name data field down to the Profit Center footer
- 21. Delete the Profit Center Name label leaving the Major Sort band blank; Use the handles to minimize the white space
- 22. Select the Total fields from the from the Premium Payable Name footer and press CRTL + C on your keyboard to copy the fields
- 23. Click in the Profit Center
 Name footer and press CTRL
 + V on your keyboard to paste
 a copy of these fields into that
 footer
- 24. Select the Insert Tab to use the Label option
- 25. & 26. Create two column headers
- 27. Use the Text property to label the new column headings "Department" and "Profit Center" respectively











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