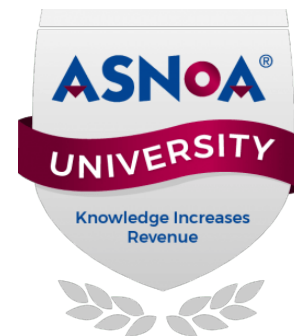# EPIC Reports & Descriptions

Activity Report: This report will show you Open Activities for your clients.

Book of Business: This report will show you all active policies for the agency +365 days.

Cancellation Report - 7 days: This report will show you policies that were cancelled either via a download or by the agency.

Communication Log: Claims Received: This report will show you daily claims that were downloaded into the EPIC account under Claims. The download will include the Open Claim, Any adjustor changes, payments, and Closed Claim.

Client List: This report can be edited to run the client list for prospects, active or by specific criteria.

EDoc Activity Report: This report will show you Activity Notes that were downloaded into EPIC from the carrier. These notes will include, pending cancellations, downloads of the policy or dec pages to the Attachments folder for your client, in EPIC and EFT Issues (Guaranteed Funds Memo- EFT was NSF).

Communication Log: Exception Report: This report will show you renewal policies that downloaded with an increase of 10% for Pl and 5% for CL. We use this report to remarket the RWL renewals.

Expiration Report: This report will show you policies that are due to renew in +90 or +120 days.

New Business Report - 30 days: This report will show you the active policies that were entered in EPIC for the past month.

Past Expiration Report: This report will show you policies that didn't renew in EPIC. These policies need to be renewed. Check Suspense for the download, request another download, manually renew the policy or cancel.

Policies in Process - Submitted Suspended Report: This report will show you policies that were not Issued in EPIC. These policies need to be issued. Check Suspense for the download, request another download, manually issue the policy, cancel or not issue.

Communication Log - Policies Received Report: This report will show you policies that were downloaded from the carrier directly into the client's policies in EPIC. If there is NO lookup code next to the name, then you'll need to assign the policy out of Suspense.

Unassigned Suspense Items by Branch Code: This report will show policies that were downloaded into Suspense with your agency branch but weren't downloaded into the EPIC policy. These policies need to be assigned out of Suspense.

Dashboard Reports

Hit Ratio Report: This report will show you what Opportunities that you won or lost over a period of time.

Pipeline Report: This report will show you open Opportunities for your Sales Teams and members. It will also show you the duration of the open opportunity.

Prospects Missing Opportunities: This report will show you any prospects entered in EPIC and an Opportunity wasn't created.

Sales Report: This report will show you a premium amount by Sales Team for the month.

Accounting Reports

E&O Report: This report will show you an annual carrier total. (Use the Book of Business report for total policies.)

Production Report: This report will show you total premium and policy numbers based off the Pr/Br Commission Production %.

Producer Report: This report will show you total premium and commission for producers.