

EDUCATION SERVICES

Applied University Training Schedule



**APPLIED**

# **Applied University Training Schedule**

## **Applied TAM<sup>®</sup>**

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### Introduction

This document is intended to provide a comprehensive view of all Applied University courses available for Applied TAM, as well as the dates and times that each course is offered with a live Product Instructor. Our recommendation is that you take live instructor led courses where available so that you can ask questions during the session. All times listed are in Central Time.

All courses are available as recorded sessions, which can be taken at any time to accommodate your schedule. When taking a recorded session, please take notes and bring any questions to Office Hours where a Product Instructor will be available to answer your questions.

Education Rewind sessions are held every Friday from 2:00PM-3:00PM CT. PLEASE NOTE: Education Rewind will not be held on March 30th.

Office Hours are held Thursday and Friday from 12:00PM – 1:00PM CT. PLEASE NOTE: Office Hours will not be held on March 30th.

If a live course has no registrants 24 hours prior to the start of the session, registration will be closed. This does not include Office Hours, which can be registered for and joined at any time leading up to or during the session.

## Servicing

This track provides servicing staff members with the core knowledge required to use Applied TAM as part of everyday activities. You should begin the Servicing training with the TS001 – Guide to Servicing Training, which reviews the Servicing series and guides you through your training. All staff will benefit from the TS100 and TS200 sessions, as they give the basis of knowledge with accessing and navigating through Applied TAM. Producers will use the information found in the TS300 and TS400 sessions useful in their daily contact and sales activities. CSRs will find that this entire series of classes will give them the knowledge to perform their daily client work, as the series follows a new business workflow, from initial contact to managing the clients account, claims, and billing. Accounting staff should also take the TS900 Transactions, as that will help give an overall view of how money flows through the Applied TAM system.

Class Code	Class Objectives	Class Length	Dates/Times Offered
<b>TS001: Guide to Servicing Training</b>	Upon completion, participants will: <ul style="list-style-type: none"> <li>• Be familiar with the structure of the Applied University Servicing training track</li> <li>• Understand what is covered in each Servicing session</li> <li>• Know what sessions are recommended</li> </ul>	30 minutes	Thursday, February 15, 11:00 AM Thursday, March 1, 11:00 AM Thursday, March 8, 11:00 AM Thursday, March 15, 11:00 AM Thursday, March 22, 11:00 AM Thursday, March 29, 11:00 AM
<b>TS100: Introduction to Applied TAM</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Access the Client Portal</li> <li>• Sign in to Applied TAM</li> </ul>	30 minutes	Available as Recorded Session Only
<b>TS200: Home Base and Clients</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Identify the areas on Home Base</li> <li>• Access Clients and Files in order to work with client information</li> </ul>	60 minutes	Available as Recorded Session Only
<b>TS250: myTAM Overview</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand myTAM and its functionality</li> <li>• Access myTAM</li> </ul>	12 minutes	Available as Recorded Session Only
<b>TS300: Prospects</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Add a prospect and complete the prospect detail</li> <li>• Add prospect policies and complete corresponding applications</li> </ul>	58 minutes	Available as Recorded Session Only
<b>TS400: Contacts and Attachments</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Add contacts</li> <li>• Use Commercial Info Screens to record business details</li> <li>• Add attachments, such as documents, scanned items and emails</li> <li>• Move a prospect to the customer area</li> </ul>	45 minutes	Available as Recorded Session Only
<b>TS500: Managing New Policies</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Complete the customer detail</li> <li>• Complete the policy detail</li> <li>• Issue a binder</li> <li>• Issue auto ID cards</li> </ul>	39 minutes	Available as Recorded Session Only
<b>TS600: Policy Workflows Part I</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Create an Evidence of Property</li> <li>• Issue certificates</li> <li>• Use Policy Quick View</li> </ul>	35 minutes	Available as Recorded Session Only

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<b>TS700: Policy Workflows Part II</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Process change requests</li> <li>• Generate a Summary of Insurance</li> <li>• Process policy cancellation workflows</li> </ul>	39 minutes	Available as Recorded Session Only
<b>TS800: Managing Renewal Policies</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Process a renewal</li> <li>• Renew a policy when re-marketing</li> <li>• Access and work with policies in history</li> <li>• Add a new line of business at renewal</li> <li>• Break up a package policy for renewal</li> </ul>	29 minutes	Available as Recorded Session Only
<b>TS900: Transactions</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand the difference between Agency Bill and Direct Bill</li> <li>• Enter Agency Bill transactions</li> <li>• Update transactions</li> <li>• Delete transactions</li> </ul>	53 minutes	Available as Recorded Session Only

## Accounting

This track provides accounting staff members with the core knowledge required to use Applied TAM to perform back-office accounting daily tasks and procedures. You should begin the Accounting training with the TA001 – Guide to Accounting Training, which reviews the Accounting series and guides you through your training. The [Servicing Course](#) TS900 Transactions should also be taken by accounting staff, as that will help give an overall view of how money flows through the Applied TAM system.

Class Code	Class Objectives	Class Length	Dates/Times Offered
<b>TA001: Guide to Accounting Training</b>	Upon completion, participants will: <ul style="list-style-type: none"> <li>• Be familiar with the structure of the Applied University Accounting training track</li> <li>• Understand what is covered in each Accounting session</li> <li>• Know what sessions are recommended</li> </ul>	30 minutes	Thursday, February 15, 2:00 PM Thursday, March 1, 2:00 PM Thursday, March 8, 2:00 PM Thursday, March 15, 2:00 PM Thursday, March 22, 2:00 PM Thursday, March 29, 2:00 PM
<b>TA100: Receipts and Transfer of Funds</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Enter, revise and void a receipt (deposit)</li> <li>• Print a receipt for cash</li> <li>• Transfer funds between bank accounts</li> </ul>	41 minutes	Available as Recorded Session Only
<b>TA200: Disbursements</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Enter, revise, and void disbursements (checks)</li> <li>• Print checks</li> <li>• Process Electronic Funds Transfer (sweeps)</li> </ul>	49 minutes	Available as Recorded Session Only
<b>TA300: Journal Entries and Vouchers</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Review receivable and payable details from the client account using account views</li> <li>• Enter, revise, and void a journal entry</li> <li>• Utilize recurring journal entries</li> <li>• Utilize and process vouchers</li> </ul>	32 minutes	Available as Recorded Session Only
<b>TA400: Reconciliations</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Reconcile an Agency Bill statement</li> <li>• Record Direct Bill commissions</li> <li>• Reconcile a bank (checkbook) statement</li> </ul>	46 minutes	Available as Recorded Session Only
<b>TA500: Month End</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Customize the month-end checklist</li> <li>• Prepare the system for month-end</li> <li>• Process month-end reports</li> <li>• Generate, verify and accept month-end journal entries</li> <li>• Post (finalize) month-end</li> </ul>	26 minutes	Available as Recorded Session Only

## Reports & Marketing

This track provides staff members who are responsible for reporting tasks with the core knowledge required to use Applied TAM to build and generate necessary reports. You should begin the Reporting training with the TR001 – Guide to Reporting Training, which reviews the Reporting series and guides you through your training. TR100 Basic Reports & Searches applies to anyone who utilizes reports and may be sending these to other employees for viewing. TR200 Marketing will provide those responsible for running marketing reports, such as cross selling, insight into setting up and running a marketing plan. TR300, TR400, and TR500 are more granular, advanced sessions and delve further into customizing the final output of your report (using Searches).

Class Code	Class Objectives	Class Length	Dates/Times Offered
<b>TR001: Guide to Reporting Training</b>	Upon completion, participants will: <ul style="list-style-type: none"> <li>• Be familiar with the structure of the Applied University Reporting training track</li> <li>• Understand what is covered in each Reporting session</li> <li>• Know what sessions are recommended</li> </ul>	30 minutes	Thursday, February 15, 10:00 AM Thursday, March 1, 10:00 AM Thursday, March 8, 10:00 AM Thursday, March 15, 10:00 AM Thursday, March 22, 10:00 AM Thursday, March 29, 10:00 AM
<b>TR100: Basic Reports and Searches</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Access reports and understand the screen geography</li> <li>• Run reports</li> <li>• Set up a search in Applied TAM reports</li> <li>• Set the search parameters</li> <li>• Run a search</li> </ul>	41 minutes	Available as Recorded Session Only
<b>TR200: Marketing</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand the marketing options in Applied TAM</li> <li>• Import and export prospects</li> <li>• Create a marketing plan</li> <li>• Use the Marketing Wizard to issue marketing letters</li> </ul>	49 minutes	Available as Recorded Session Only
<b>TR300: Advanced Reports and Searches</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Plan a search</li> <li>• Use the available searches in Applied TAM to delve deeper into reporting capabilities</li> <li>• Select data fields and sorts for your final report</li> </ul>	32 minutes	Available as Recorded Session Only
<b>TR400: Edit Report Format</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Customize your report format using the Report Designer</li> <li>• Use the menu bar options</li> <li>• Understand how to utilize report expressions</li> <li>• Use data groupings</li> </ul>	46 minutes	Available as Recorded Session Only
<b>TR500: Variables and Totals</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Create and use report variables</li> <li>• Utilize the report title band and report summary band to sort data on your final report</li> </ul>	26 minutes	Available as Recorded Session Only

## Operations

This track is key and provides staff members with the processes and procedures to effectively setup and maintain the organization’s Applied TAM system. You should begin the Operations training with the TO001– Guide to Operations Training, which reviews the Operations series and guides you through your training. TO100 and TO200 will show you how to set up your system. TO300 will give you the knowledge of how to grant rights to staff members to access various areas and functions of Applied TAM. TO400, TO500 and TO600 will discuss how to set up your system for downloading with carriers, assigning downloaded items from suspense, and options to invoice through downloaded transactions. TO700 discusses the three procedures that every organization must run daily to maintain their system and keep it running at 100% and error free. And finally, TO800 delves into how to setup and revise your organization’s myTAM workflows.

Class Code	Class Objectives	Class Length	Dates/Times Offered
<b>TO001: Guide to Operations Training</b>	Upon completion, participants will: <ul style="list-style-type: none"> <li>• Be familiar with the structure of the Applied University Operations training track</li> <li>• Understand what is covered in each Operations session</li> <li>• Know what sessions are recommended</li> </ul>	30 minutes	Thursday, February 15, 3:00 PM Thursday, March 1, 3:00 PM Thursday, March 8, 3:00 PM Thursday, March 15, 3:00 PM Thursday, March 22, 3:00 PM Thursday, March 29, 3:00 PM
<b>TO100: Agency Structure and Setup</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Designate the initial accounting month</li> <li>• Set up the agency structure</li> <li>• Select system accounting options</li> <li>• Enter the chart of accounts</li> <li>• Set up required accounts</li> </ul>	48 minutes	Available as Recorded Session Only
<b>TO200: System Defaults</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Manage field defaults</li> <li>• Establish activity defaults to aid in the tracking of workflows</li> <li>• Create form letters</li> <li>• Install needed policy types</li> </ul>	46 minutes	Available as Recorded Session Only
<b>TO300: Security Manager</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand the geography of the security manager screens</li> <li>• Manage security groups</li> <li>• Manage user codes</li> </ul>	27 minutes	Available as Recorded Session Only
<b>TO400: Interface Setup</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Access/Enter Agency File Interface Setup</li> <li>• Access/Enter Company File Interface Setup</li> <li>• Understand NAIC Codes</li> <li>• Utilize the Copy Company File Interface Setup tool</li> <li>• Set up preferences for the communication log</li> </ul>	49 minutes	Available as Recorded Session Only



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<b>TO500: Policy Download and Suspense</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand what happens during download</li> <li>• Read and work with the Communication Log</li> <li>• Grasp policy status and its importance in download</li> <li>• Recognize the Matching criteria</li> <li>• Work with and assign suspense data</li> <li>• Use client-level verification to verify that a download was received</li> </ul>	51 minutes	Available as Recorded Session Only
<b>TO600: Direct Bill Commission and Automated Download Invoicing</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Utilize Direct Bill Commission Download (DBCD)</li> <li>• Process Automated Download Invoicing (ADI)</li> </ul>	46 minutes	Available as Recorded Session Only
<b>TO700: Daily Procedures</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Run TAMStart</li> <li>• Set up and run close-day</li> <li>• Set up and run night utilities</li> </ul>	34 minutes	Available as Recorded Session Only
<b>TO800: myTAM Administration</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand why myTAM can be an effective tool in processing daily workflows</li> <li>• Enable the myTAM feature for all users</li> <li>• Build a workflow</li> <li>• Use Group assignments to easily assign myTAM workflows to organization staff</li> </ul>	49 minutes	Available as Recorded Session Only

## Online Environment

When your organization moves to Applied TAMOnline from your local network, there will be various changes in your procedures. This track provides you with information on installing Applied TAMOnline (TOL100), an overview of the environment (TOL200), and information on working with the AppliedOnline Manager Client (TOL300). TOL400 will cover changes in the scanning workflow when moving to the new environment. In TOL500, you will learn about the Upload Center and how to use it to move documentation from a local drive into the Applied TAMOnline environment. Finally, TOL600 will show the added workstep needed to process non-IVANS downloads in Applied TAMOnline.

Class Code	Class Objectives	Class Length	Dates/Times Offered
<b>TOL100: Installing Applied TAMOnline</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Install the TOL icon on your desktop</li> <li>• Change local settings on your computer</li> <li>• Connect to the TOL desktop</li> </ul>	18 minutes	Available as Recorded Session Only
<b>TOL200: Applied TAMOnline Overview</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Be familiar with the Applied TAMOnline desktop</li> <li>• Understand the Applied TAMOnline icons, drives, and Internet Explorer</li> <li>• Utilize your Applied TAMOnline password</li> </ul>	13 minutes	Available as Recorded Session Only
<b>TOL300: AppliedOnline Manager (AOM) Client</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Access AppliedOnline Manager (AOM) Client</li> <li>• Use the AOM Menu Bar</li> <li>• Understand the uses of the AOM functions</li> </ul>	14 minutes	Available as Recorded Session Only
<b>TOL400: Scanning in Applied TAMOnline</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand changes in the scanning workflow for Applied TAMOnline</li> <li>• Understand various scanning workflows</li> </ul>	13 minutes	Available as Recorded Session Only
<b>TOL500: Upload Center</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand how to move documents on your desktop to the Applied TAMOnline environment</li> <li>• Demonstrate the various uses of Upload Center</li> </ul>	13 minutes	Available as Recorded Session Only
<b>TOL600: Non-IVANS (3<sup>rd</sup> Party) Downloads</b>	Upon completion, participants will be able to: <ul style="list-style-type: none"> <li>• Understand the added workflow step needed to process non-IVANS downloads in Applied TAMOnline</li> </ul>	10 minutes	Available as Recorded Session Only