

Applied Epic® Browser Rollout Checklist

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

Technical & Agency 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.

- **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 viewed on the bottom right of the Epic Login screen). Enter the URL with your Enterprise ID into your internet browser and the next screen will ask for your agency's Enterprise ID. This only happens once per user to validate the login.

- Click Login, then enter your User Code 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 with the move to the browser:

- [Applied Epic Hardware Configuration Guidelines](#)
- [Applied Epic Software Configuration Guidelines](#)
- [Product Compatibility Grid](#)
- [Applied Epic Release Notes](#) will provide the latest updates to Epic. Also available are previous release notes, found in the left navigation bar.

- **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 guide below for information and links to 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](#)

- **Connection Suite Deployment to All Computers**

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. The components are loaded once per computer, then updates are sent automatically. For more information on the Connection Suite, review [Epic Browser - Installing the Connection Suite](#).

- **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 look and function slightly differently than you're used to, but the core purpose of each Applied Epic workflow remains the same. For key specific differences in functionality between the desktop and browser, please refer to the [Epic Browser User Guide - Differences in Functionality](#) section.

Browser Go Live

- **Send Login Instructions to All Employees**

Send an announcement email to your staff with login instructions, including your unique browser URL, Enterprise ID, and Database name (if

users have more than one option to choose from).

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.

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

