

MCP SERVER

NO CODE

CLOUD HOSTED

Applied Epic MCP for AI Agents

Track client policies and compliance activities

Applied Epic connects your AI client directly to your insurance management platform data. It lets you search for clients and policies in real-time, track compliance activities, and manage policy lifecycles using natural conversation. Get instant visibility into everything from account demographics to upcoming renewals.

A+ Quality Score 100/100

agency-management

policy-tracking

client-records

compliance-monitoring

insurance-workflows

renewal-management



The connectivity layer between AI and the world's software.



Vinkius sits between AI and every application. All communication passes through Vinkius Cloud via the Model Context Protocol (MCP) — with governance, observability, and security at every layer.

Your AI Connections Run Through Vinkius Cloud

The world's largest
managed MCP catalog

Vinkius is the connectivity layer where AI connects to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.

— Architecture principle

Four Pillars of the Vinkius Runtime

01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

AES-256

Encryption at rest

Ed25519

PKI vault signatures

24h TTL

Ephemeral session keys

V8 Isolate

Sandboxed execution

One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

`https://edge.vinkius.com/{token}/mcp`

Claude



Cursor



VS Code



Windsurf



Grok



Gemini

Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

01 — Ed25519 PKI Vault

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

02 — V8 Isolate Sandboxing

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

06 — Honeypot Trap System

Phantom credentials are injected into isolated environments. If a honeypot is used outside Vinkius infrastructure, the server is quarantined instantly.

Emergency Kill Switch

EU AI Act Art. 14(1)
Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

Control Plane

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Incident Log

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

Get started at cloud.vinkius.com — connect your AI agent in under 60 seconds.

Applied Epic MCP

9 tools available

Cloud-hosted on Vinkius

This MCP gives your agent a full natural language view of Applied Epic. Instead of clicking through menus to find client details or check policy statuses, you just ask for it. You can get real-time visibility across all your agency's data—from listing current clients and searching specific policies to finding attached documents like proof of insurance.

Need to keep track of follow-ups? Use the MCP to generate activity records directly from your chat, ensuring no renewal task gets missed. It also lets you drill down into specific lines of business for any policy or list all related files. Because this integration is hosted on Vinkius, connecting it is straightforward, and your agent can access this data instantly.

It's built to handle the complexity of insurance workflows: monitor compliance tasks, track everything from effective dates to expiration statuses, and manage full client demographics—all without ever leaving your chat window. You just talk to your AI client.

Core Capabilities

01 — Search and view all client records

List all insurance clients in the platform or fetch specific details for a single account.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/applied-epic — connect your AI agent in three steps.

- 01** Connect your Applied Epic account credentials to the MCP using standard OAuth 2.0 security.
- 02** Your AI client accesses the structured data through the Vinkius platform, translating natural language requests into specific API calls (e.g., 'list all clients').
- 03** The agent receives formatted data—like a list of expiring policies or open tasks—and presents it back to you in plain text.

The bottom line is that your AI client acts as an intermediary, letting you talk to the complex backend system without ever needing to navigate its menus.

Built For

This MCP is for insurance agencies and account management teams. Specifically, it helps agents tired of jumping between CRM systems, policy portals, and spreadsheets just to check one client's compliance status. It lets them keep all that data centralized in a conversation.

Insurance Agent

Quickly pulling up full demographic details or checking if an existing policy has the correct lines of business without logging into multiple systems.

Account Manager

Monitoring all upcoming renewals and ensuring compliance tasks are logged on time for large client accounts across multiple policies.

Agency Operations Staff

Managing the overall workflow by listing attachments or creating follow-up activities for a whole book of business at once.

What Changes When You Connect

- 01** Stop bouncing between tabs. You can get full policy details or list all clients just by asking your agent a question.

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- 02 Keep track of compliance tasks instantly. If you need to log a follow-up call, use `create_activity` right from the chat interface.

 - 03 Never lose proof of insurance again. Use `list_attachments` to find and manage documents linked to any client or policy ID.

 - 04 Get lifecycle visibility fast. Easily check if policies are expiring soon by using `get_policy` for status checks.

 - 05 Deep dive into coverage. Instead of guessing, use the MCP to list all specific lines of business for a given policy, like General Liability.
-

Real-World Applications

Client onboarding and record verification

A new account manager needs to verify client history. They prompt their agent: 'List all clients and find the attached documents for Global Logistics Inc.' The MCP uses `list_clients` and `list_attachments` to give them a single, verifiable snapshot of the client's file.

Handling compliance gaps

An agent realizes they missed a task. They prompt: 'What follow-ups are due for John Doe?' The MCP uses `list_activities` to immediately surface all open tasks and missing logs, allowing them to use `create_activity` to set the next reminder.

Preparing for quarterly reviews

An account manager needs an overview. They ask: 'Show me all policies expiring next quarter.' The MCP uses `list_policies` and filters by date to provide a targeted list, ensuring nothing slips through the cracks before renewal.

Investigating coverage gaps

A user questions a policy's coverage. They ask: 'What lines of business does Policy #ABC-123 cover?' The MCP uses `list_lines` to drill down, confirming if it includes Workers Comp or General Liability.

Patterns to Avoid

Using email attachments for records

X AVOID

Pasting screenshots of policy details into an email thread because the system is too hard to use.

✓ INSTEAD

Use the MCP. Just ask your agent: 'Get details for client XYZ.' The platform pulls the official data, ensuring accuracy and keeping a permanent record using ``get_client``.

Manual policy tracking via spreadsheets

X AVOID

Manually updating massive Excel sheets every time a renewal date changes or a document is added.

✓ INSTEAD

Use the MCP to list policies. Request 'list all policies' and filter by expiration date. This keeps your data live and accurate using ``list_policies``.

Forgetting compliance tasks

X AVOID

Leaving a client file because no one remembers to follow up on the required documents or renewal steps.

✓ INSTEAD

Use the MCP. Ask your agent: 'What activities need attention for this account?' This pulls all outstanding items using ``list_activities`` and lets you track them with ``create_activity``.

The Right Fit

Use Applied Epic MCP if your agency's core pain point is information retrieval from disparate systems. If your team spends time jumping between the CRM, the document repository, and policy portals just to get a client picture, this is for you. You need deep visibility into policies, activities, and attachments.

Don't use it if you only need basic contact info; other simple directory tools might suffice. More importantly, don't rely on this MCP if your primary workflow involves complex financial modeling or tax preparation—those systems require specialized integration types outside of core insurance management. This tool excels at operational data retrieval and compliance tracking.

Applied Epic: Streamlining client records with the Applied Epic MCP

Right now, checking a single client's file is a mess of clicks. You jump from the main dashboard to check demographics, then open a separate tab to find policy details, and finally click into another section just to see if proof of insurance is attached. It takes minutes, and you always risk missing a key piece of information.

With this MCP, the process disappears. You simply ask your agent for 'all client records for Acme Corp.' The platform instantly synthesizes demographics, policy statuses, and all linked files into one cohesive answer. You get instant answers without ever clicking away from your chat.

Applied Epic: Managing compliance tasks with the Applied Epic MCP

Manually tracking renewals means juggling calendars, spreadsheets, and emails. If a client's policy is due in 60 days, you have to remember to log that reminder somewhere, often resulting in missed follow-ups or inaccurate task lists.

Now, your agent handles it. You can ask for 'upcoming compliance tasks.' The MCP checks the system and gives you an accurate list of open items using `list_activities`. If you need to set a new one, you just tell the agent to create it—it logs it immediately.

Applied Epic: 9 Tools for Client & Policy Management

These tools allow your AI agent to perform specific operations in Applied Epic, letting you list clients, create activities, and retrieve policy details through structured commands.

#	TOOL	DESCRIPTION
01	<code>create_activity</code>	Logs a new task, call, or reminder against an account in the system.
02	<code>get_account_check</code>	Verifies that your connection to Applied Epic is working correctly and authorized.
03	<code>get_client</code>	Retrieves all demographic and compliance details for a single client ID.
04	<code>get_policy</code>	Fetches the full status, effective dates, and current details of one specific policy.
05	<code>list_activities</code>	Retrieves a comprehensive list of all past or pending tasks and logs associated with an account.
06	<code>list_attachments</code>	Finds and lists all documents, photos, or proof-of-insurance files linked to clients or policies.
07	<code>list_clients</code>	Gives a list of every insurance client recorded in the Applied Epic system.
08	<code>list_lines</code>	Lists all specific lines of business (e.g., GL, Workers Comp) associated with one policy ID.
09	<code>list_policies</code>	Retrieves a list of every insurance policy currently on file in the agency's records.

See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

U What policies do I have for client ID 9876? Are there any expiring soon?



Client: Global Logistics Inc. (ID 9876)

Here is the policy overview:

- **Policy #A123:** General Liability, \$1M coverage. Expires: **Oct 15, 2024.**
- **Policy #B456:** Workers Comp, \$500k coverage. Expires: Oct 15, 2025 (Active).

There are two policies expiring within the next 90 days. You should follow up with them immediately.

U List all documents attached to Downtown Realty and tell me if I have current proof of insurance.



Client: Downtown Realty

Found 3 attachments:

- `D0_R_PoLicy_2024.pdf` (Date: 2024-01-05)
- `Photos_Site_Walkthrough.zip` (Date: 2024-02-20)
- **Proof of Insurance Certificate.** (Status: Current, Valid until Oct 31, 2024)

You've got the proof of insurance attached and it looks good for now.

U What lines of business does Policy #C789 cover? And what are my open tasks for that account?



Policy #C789 Coverage:

This policy covers:

- General Liability (GL)
- Umbrella
- Commercial Auto

Open Tasks/Activities:

We have 2 follow-ups logged:

1. Review Annual Compliance Report (Due: End of Month)
2. Send Renewal Notice Reminder (Due: Next week)

Frequently Asked Questions

01 How does the Applied Epic MCP help me manage client policies?

The Applied Epic MCP gives you a single way to access all your policy information. You can ask it for current status, expiration dates, and specific details on coverage lines without clicking through multiple screens.

02 Can I use the Applied Epic MCP to log tasks or calls?

Yes. When you need to remember a follow-up call or set a compliance task for an account, your agent can create that activity record instantly using this MCP. It keeps your work history accurate and organized.

03 What kind of documents can I find with the Applied Epic MCP?

You can list all file attachments tied to clients or policies. This includes proof of insurance, photos, contracts, and any other critical document stored in your agency's record keeping system.

04 Is the Applied Epic MCP secure for sensitive client data?

Yes, it uses industry-standard OAuth 2.0 authentication, ensuring that only authorized connections can access and manage your confidential client and policy information.

05 How do I check if a client exists in Applied Epic using the MCP?

You simply ask to list clients or fetch specific details by name or ID. The MCP uses its tools to search the entire database, confirming existence and pulling full demographic data for you.

06 Does the Applied Epic MCP only work with one type of insurance?







No. It manages a wide variety of lines of business, such as Workers Comp or General Liability. You can drill down into any policy to see exactly what coverage is included.

Go Live in 60 Seconds

Get your connection token from cloud.vinkius.com, then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
 Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"applied-epic": { "url": "..."</code>
 Windsurf	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
 Gemini	Extensions → Add MCP Server → Paste endpoint URL

ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

-  **Ask ChatGPT** 
-  **Ask Claude** 
-  **Ask Perplexity** 
-  **Ask Gemini** 
-  **Ask Grok** 

READY TO CONNECT

Applied Epic is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and
start building. No SDK. No deployment. Just results.

[Start at cloud.vinkius.com](https://cloud.vinkius.com) →

vinkius.com · support@vinkius.com

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