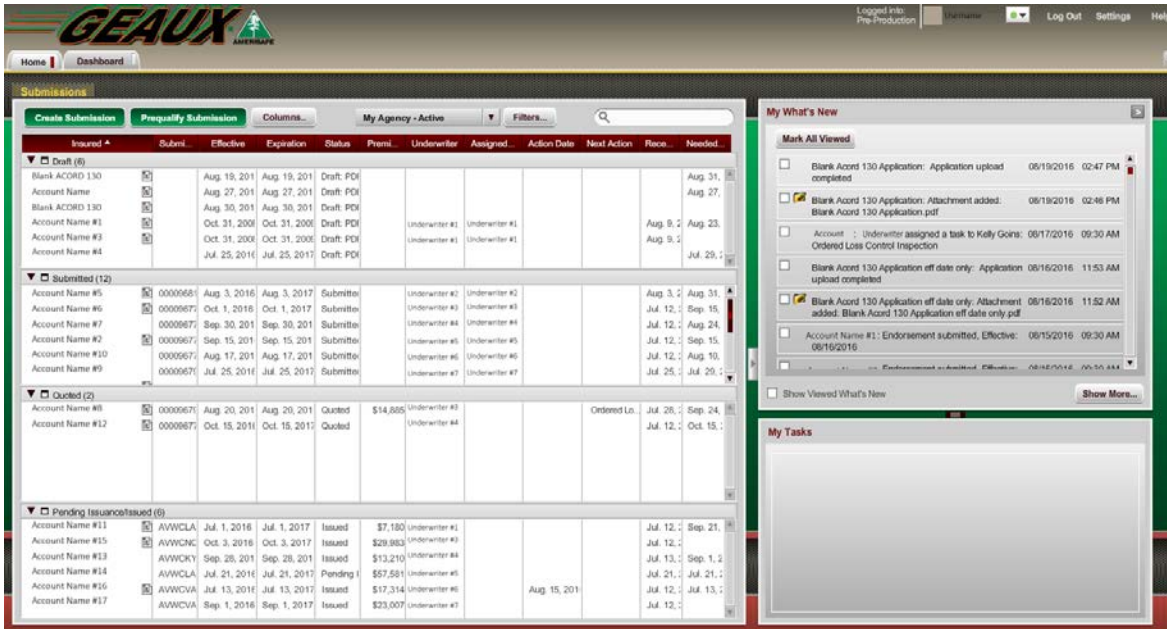


[geaux.amerisafe.com/agent](http://geaux.amerisafe.com/agent)



The Submissions Home tab lists the submissions for which you are either the Producer or Agency/Brokerage Contact. From the Submissions Home tab, you can create new submissions, sort and search for existing submissions, and monitor status changes and tasks for all of your submissions. You can open multiple submissions at once. When you do, each submission appears in its own tab. You can do the following from the Submissions Home tab:

## HOME PAGE

- Create New Submissions
- Prequalify Submissions
- Search for Submissions
- Filter Submissions
- View the List of Submissions
- View My What's New and My Tasks

## ACCOUNT STATUS

- Draft: Submissions created or downloaded not yet submitted to AMERISAFE.
- Clear: Submissions in Underwriting review
- Quoted: Submissions having been quoted
- Bind Requested/Bound: Submissions requested by user to be bound.
- Pending Issuance/Issued: Submission currently written with AMERISAFE or are pending policy issuance.
- Declined/Lost: Submissions having been declined and quoted and not bound.
- Renewed/Expired/Non-Renewed: Submissions having been renewed, expired or non-renewed.

## FILTERS

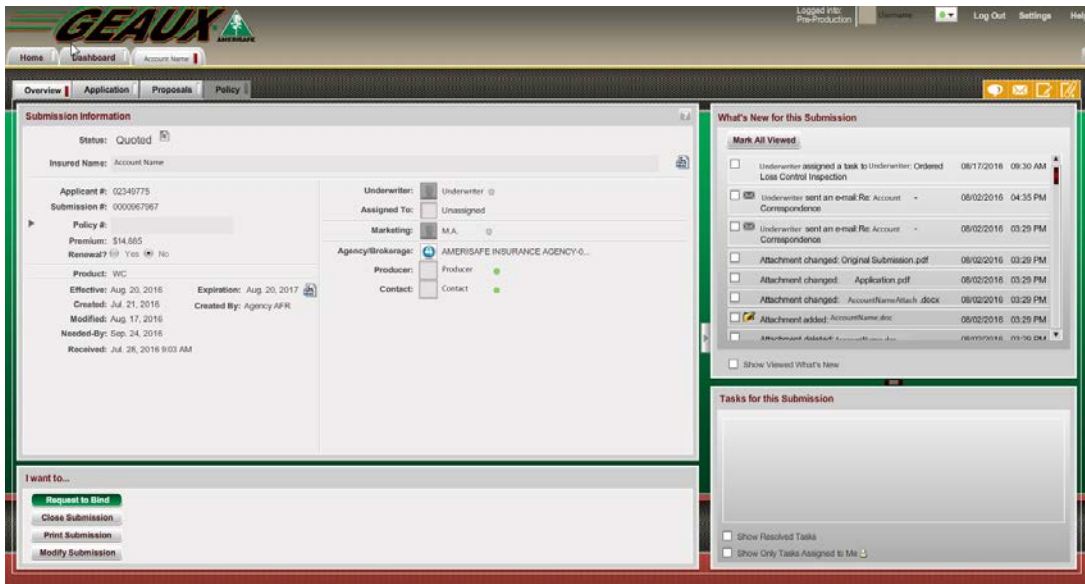
- My Submissions - Active: Active submissions assigned to the user. Does not include the Declined Lost, Renewed/Expired/Non-Renewed, or Cancelled.
- My Submission - All: All submissions assigned to the user.
- My Agency - Active: (Default Filter) Active submissions existing for your agency/brokerage. Does not include the Declined Lost, Renewed/Expired/Non-Renewed, or Cancelled.
- My Agency - All: All Submissions assigned to agency/brokerage users with the agency/brokerage.

## MY WHAT'S NEW & TASKS

- The My What's New pane provides a list of activity for all of your submissions, including the creation of new submissions, status changes, and the addition, modification, or deletion of notes or attachments.
- The My Tasks section of the Home tab lists all of your assigned tasks that require completion.

## CREATING SUBMISSIONS

- You can create new submissions by uploading from an agency management system, entering the account data manually or uploading via PDF by using the Create Submission button. When creating a new submission, all required fields must be completed prior to clicking the Submit button. Required fields are indicated by a red asterisk (\*). Loss runs, supplemental applications and mod worksheets can be attached in the Collaboration Tools. After an account has been submitted it can be changed using the Modify Submission button.



## OVERVIEW TAB

- **Submission Information:** Provides General information on the submission to include insured Name, Account #, Premium, Effective/Expiration Dates, Underwriter, Service Contacts, etc...
- **I Want To Section:** This section includes buttons that vary based on the current status of the submission. For example, before the application is submitted, the View Draft, Submit Draft, and Delete draft buttons appear. After you submit the application, the View Submission button appears. When a quote is available for your review, the View Proposal button appears, and so on.
- **What's New:** The What's New for this Submission panel lists the most recent actions that have occurred for the submission, including notes and attachments that were added or changed and status or ownership changes for the submission. This section is similar to the What's New area on the Home screen, but it is specific to this submission.
- **Tasks:** The Tasks for this Submission panel lists all unresolved tasks for the submission, including those assigned to other users if those tasks were shared with you. You can hide tasks that are assigned to other users by selecting Show Only Tasks Assigned to Me at the bottom of the Tasks panel.

The Application Tab contains multiple Tab Headers for the account. Red asterisks (\*) on a tab header indicate that required fields remain on that tab. Click that asterisk icon to move to the next incomplete required field on that tab. Each required field has a red asterisk (\*) next to the display label. When a required field is complete, a green check mark (✓) replaces the red asterisk.

## APPLICATION TAB

- General Information: Insured's information- Address, Nature of business, Employer's Liability, etc...
- Rating Elements: State, Class Codes, Premium, etc.
- Acord Questions: General Acord questions and additional information
- Prior Career Information/Loss History: former policy information and loss history.
- Supplemental Information: If prompted

## PROPOSALS TAB

On the Proposals tab, you can view the quotes that an Underwriter has prepared for your submission. When a new quote is available, a pop-up window will inform you that it is available for viewing. If you click Yes, View it now, the quote will open in the Proposals tab for that submission. If you want to view the quote later, click No, view it later. If you choose not the view the quote immediately, you can view it at any time by opening the submission and clicking the Proposals tab.

## POLICY TAB

The Policy Tab includes all endorsements for the related submission. The top item in the list is the Issued policy. The Policy tab includes the following information about each endorsement:

- The policy number that is associated with the endorsement, date the endorsement was issued and the endorsement #
- Endorsement's effective date; this value is a date between the submission's effective date and expiration date and the description of the endorsement.
- Status: Status of the endorsement: Draft, Submitted, Pending Issuance, Issued, or Closed.
- Policy Premium

**For additional information, please contact the AMERISAFE Marketing Department at 800.897.9719, or refer to the help button within GEaux.**