



Geaux Agent Workspace Home Page

Insured	Account	Effective	Expiration	Status	Premium	Coverage
Draft (10)						
Blueman Bus Company		Mar. 23, 2009	Mar. 23, 2010	Draft		WC
Cafe Complete		Oct. 29, 2009	Oct. 29, 2010	Draft		WC
Dora's Donuts		Mar. 26, 2009	Mar. 26, 2010	Draft		WC
Fein's Landscaping		Jan. 29, 2010	Jan. 29, 2011	Uploaded		WC
Submitted (1)						
Laredo Mexicana	FB-00029	Dec. 30, 2009	Dec. 30, 2010	Submitted		WC
Clear (6)						
Appetizing Quotes	FB-00002	May 23, 2009	May 23, 2010	Clear		WC
FBP Company	FB-00203	May 31, 2009	May 31, 2010	Clear		WC
Green Acres Cafe	FB-00012	Jul. 31, 2009	Jul. 31, 2010	Clear		WC
Practice Professionals Inc.	FB-00001	May 16, 2009	May 16, 2010	Clear		WC
The Golden Dragon	FB-00030	Dec. 26, 2009	Dec. 26, 2010	Clear		WC
Quoted (4)						
ECA Enterprises, Inc.	FB-00204	Jun. 13, 2009	Jun. 13, 2010	Quoted	\$3,995	WC
Goldie's Grill	FB-00031	Dec. 13, 2009	Dec. 13, 2010	Quoted	\$100,514	WC
Quo and Ted's Sushi	FB-00032	Dec. 31, 2009	Dec. 31, 2010	Quoted	\$55,220	WC
The Golden Dragon	FB-00030	Dec. 26, 2009	Dec. 26, 2010	Quoted	\$75,300	WC
Bind Requested/Bound (5)						
Blue Fin Oyster House	FB-00016	Nov. 26, 2009	Nov. 26, 2010	Bind Requ	\$64,005	WC
EBP Company	FBS-X-001	May 30, 2009	May 30, 2010	Bound	\$650	WC
EWC Company	FBS-X-001	May 29, 2009	May 29, 2010	Bound	\$79,105	WC
Rob's Restaurant	FBS-X-001	May 21, 2009	May 21, 2010	Bound	\$33,283	WC
Rob's Restaurant	FBS-X-001	May 21, 2009	May 21, 2010	Bound	\$72,750	WC
Pending Issuance/Issued (4)						
Automation Station Grill	FBS-X-001	Mar. 23, 2009	Mar. 23, 2010	Issued	\$25,602	WC
Blue Barrel Buffet	FBS-X-001	Sep. 22, 2009	Sep. 22, 2010	Issued	\$78,855	WC
Ed's Autolichious Bistro	FBS-X-001	Mar. 23, 2009	Mar. 23, 2010	Issued	\$30,377	WC
Red's Diner	FBS-X-001	Sep. 28, 2009	Sep. 28, 2010	Issued	\$60,240	WC
Declined/Lost (4)						
Glass Replacement Inc.	FB-00006	Mar. 21, 2009	Mar. 21, 2010	Declined		CA
Lost and Found	FB-00009	Mar. 23, 2009	Mar. 23, 2010	Lost		CA
The Declination Deli	FB-00008	Mar. 23, 2009	Mar. 23, 2010	Declined		WC
The Lost Cafe	FB-00007	Mar. 23, 2009	Mar. 23, 2010	Lost		WC

The Home page lists all of your accounts new and renewal alphabetically by status. From here, you can view and open existing accounts, search for accounts and create new accounts.

Account Status

- Draft – Submissions created or downloaded that have not been submitted to Amerisafe.
- Submitted – Submissions that have been submitted for underwriter review.
- Clear – Submissions having been preliminarily reviewed by underwriting and are pending additional information or loss control inspection.
- Quoted – Submissions having been quoted.
- Bind Requested/Bound – Accounts you have requested to be bound.
- Pending Issuance/Issued – Current written accounts and accounts pending policy issuance.
- Declined/Lost – Accounts that have been declined or quoted and not bound.

What's New

The What's New section shows the most recent action for your accounts, including new submissions, the addition of notes and attachments, and status and assigned underwriter changes.

To Do - Reminders

This section includes reminders about actions you need to take for your accounts. Reminders can be set by an Underwriter for you or you can set them for yourself.

Filter

In the Filter field, My Accounts represents all accounts assigned to you and My Branch represents all accounts assigned to your agency or branch location. You can search for specific account by insured name using the Search field or click the Filters button to filter by other criteria.

Opening Accounts

You can open any existing account by double-clicking the Insured name. You can open multiple accounts at once, each account will display in its own tab.



Geaux Agent Workspace Account-Specific Tabs

Overview

- Submission Information: Provides account specific information.
- I want to: Includes operational options that vary based on submission status.
- What's New: Lists the latest account activity.
- Reminders: Create and view reminders for this account.

Application

- General Information: Includes general information about the account.
- Rating Elements: Includes information necessary for underwriting rating.
- ACORD Questions: ACORD from questions and additional detail info.
- Prior Carrier Information and Loss History: Includes former policy information and loss history.
- Supplemental information: Includes supplemental applications and questions.

Proposals

Provides proposals sent by the underwriter. In addition a description, proposal status and premium are included. Accounts can be bound from the Proposal Tab.

Collaboration Tools

- Live Chat: Enables you to send and view chat messages with underwriting real-time.
- Notes: Enables you to add and view notes for the submission.
- Attachments: Enables you to add, view, upload and download attachments.

Creating New Submissions

You can create new submissions by uploading from an agency management system or by entering the account data manually 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 (*). Uploaded submissions will be in the Draft Status until all required fields are completed and the Submit Button is clicked. Loss runs, supplemental applications and mod worksheets can be attached in the submission tab. After an account has been submitted it can be changed using the Modify Submission button.

For additional information related to Geaux please refer to the Help button within Geaux or contact the Amerisafe Marketing Department @ 800-256-9052