About GEAUX

GEAUX is AMERISAFE's online services system that changes the submission and quoting processes to an interactive, transparent experience between our underwriters and agents. This web-based program allows users to submit new and renewal businesses, monitor current accounts, and collaborate productively with AMERISAFE Underwriting.

Administrator Access
https://geaux.amerisafe.com/umagent

Any user having administrative rights will have the ability to add, remove, and edit agency personnel via the Users tab within the agent portal.   The Users tab will only be visible to those with administrative rights.

Adding New Users

- Under the Users tab, select *Agency/Brokerage Users*
- Select *New User* icon
- Complete required fields indicated by an orange icon
- Select *Activate* icon

**Administrators can now grant administrative rights to individual users by selecting the *Enable This User to Administer Other Agency Users* option found beneath the required Role field.

Inactivating Users

- Under the Users tab, select *Agency/Brokerage Users*
- Select User
- Select *Actions* icon
- Select *Deactivate*

Reset Passwords

- Under the Users tab, select *Agency/Brokerage Users*
- Select User
- Select *Actions* icon
- Select *Reset Password*

Editing Users

- Under the Users tab, select *Agency/Brokerage Users*
- Select User
- Select *Edit* icon
- Make desired changes
- Select *Save*

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American Interstate Insurance Company - Amerisafe Risk Services, Inc. - American Interstate Insurance Company of Texas - Silver Oak Casualty, Inc.

User Access
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The Agent Workspace is a quick and convenient way agency personnel can submit and monitor the progress of applications. Users can use the Agent Workspace to:

● Improve the quality and productivity of new submissions
● Instill best practice and consistency
● Collaborate with AMERISAFE Underwriting
● Streamline interactions with AMERISAFE Underwriting to save time
● See real-time visibility with the status of accounts within your agency

Home Page

The agent Homepage contains the following:

● Header Taskbar
  o New Submission icon
  o Help icon
  o Chat Icon
  o Notifications Icon
  o Your Profile and Credentials

● Widget Workspaces
  o Submission Widget
  o Recent Activity Widget
  o AMERISAFE Widget

Submission Widget

The submission widget will contain all submission activity belonging to you and your agency. Each submission is shown with data in sortable columns. User may view and/or search submission information by using default or custom filters.

Recent Activity Widget

The recent activity widget is a list of the most recent activities performed on a submission, organized by submission, with the submissions with the most-recent activity listed first. . User may view and/or search activity information by using the search filters option.

AMERISAFE Widget

The AMERISAFE widget allows users instant access to AMERISAFE materials and content.

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Submissions Widget
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Pre Set Filters	• My Agency Active (Default): 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 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
Search & Custom Filters	• Select Search icon (magnifying glass icon located to the right of Preset Filters) • Select Additional Criteria and refine search by multiple options provided. Once data is entered, user can save the search as a custom filter by: 　o Selecting *Save Filter As* in the Submission header 　o Enter New Filter Name 　o Save
Navigating an Existing Submission	To open a submission, select the account. All information for the submission can be found in the left navigation sidebar. • Submission: Provides General information on the submission • Application 　o General information 　o Rating Elements 　o ACORD Questions 　o Prior Carrier Information and Loss History 　o Supplemental Information • Proposals • Policy Each section with the exception of the policy has variable options to print, save, Email, and download.

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| Modifications, Endorsements & Binding / Declining Coverage | Modifications:

- Select the submission
- Select *Actions* Icon
- Modify Submission
- Make appropriate modifications within the submission/application
- Select *Submit Modifications* icon

Endorsements:

- Select the submission
- Select the policy in the left navigation sidebar
- Select the *Actions* icon
- Select *Endorse*
- Make necessary endorsements
- Select *Create* icon

Binding Coverage:

- Select the submission
- Select the *Request to Bind* icon

Declining Coverage:

- Select the submission
- Select the *Actions* icon
- Select *Close* Submission
- Complete Reason fields
- Select Confirm |
| Collaboration Tools | Collaboration tools are found within each submission. The Collaboration icon is located in upper right corner of the screen. Collaboration consists of:
- All – Shows users all items found within Collaboration
- Chat - Allows users to communicate in real time with other users about the current submission.
- Emails - Allows users to view email messages sent
- Files - Allows users to view and upload supporting documents for the submission.
- Tasks – Allows users to create, view, and assign tasks for the submission.
- Notes – Allows users to comment on or ask questions about different parts of the submission. |

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FASTER WITH AMERISAFE®
GEAUX

Creating a New Submission
https://geaux.amerisafe.com/umagent

User can create new submissions by uploading from an agency management system, uploading via PDF or creating the submission manually by using the *New Submission* icon. When creating a new submission, all required fields must be completed prior to selection the *Submit Application* icon.

- Select New Submission
- Select option to upload via Acord or create manually by entering Insured Name
- Enter Quote Need by
- Create application
- Complete any required fields noted by orange icons
- Select Collaboration icon
- Add any required documentation (loss runs, mod worksheets, narratives, etc.) by selecting F*iles* and *New.*
- Add any *Notes* and *Tasks* if needed
- Select the *Submit Application* icon

GEAUX Assistance
https://www.amerisafe.com/contact/#online-services-team

For personal assistance, please contact our Online Resource Services Team:

800.256.9052 / AskSales@Amerisafe.com

To view short tutorial videos, please visit http://go.amerisafe.com/geaux-videos