

What's New with GEAUX 5.0

AMERISAFE is pleased to announce GEAUX has been updated from a Flash based program to a new HTML platform – Meaning availability on mobile devices, no additional plugins and much more. In addition, GEAUX has been given a cleaner look and upgraded functionalities. To learn more of these changes, please visit http://go.amerisafe.com/geaux-videos?hs_preview=yUZvhOyJ-7720329570 to view a series of short tutorial videos.

User Home Page Changes

<https://geaux.amerisafe.com/umagent>

In GEAUX 5.0, the Agent Home page layout has been upgraded with three Widget Workspaces; Submission, Recent Activity and AMERISAFE. GEAUX 5.0 features more prominent and enhanced headers containing Chat and Global Notifications keeping you updated on events affecting your submissions.

**To access a quick tutorial on the Agent Home page please visit http://go.amerisafe.com/geaux-videos?hs_preview=yUZvhOyJ-7720329570

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.

The most notable change to the Submission Widget is the removal of the submission status “buckets”. This has now been replaced with a complete submissions listing page within the Submission Widget. Users can easily create their own custom filters to mimic status buckets. Visit http://go.amerisafe.com/geaux-videos?hs_preview=yUZvhOyJ-7720329570 to access a quick tutorial on custom filters or refer to the *Search and Custom Filters* on the following page.

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.

The Recent Activity Widget has taken the place of the “*What’s New*” section found in the previous version of GEAUX. All submission activity can be found in the Recent Activity Widget.

AMERISAFE Widget The AMERISAFE widget allows users instant access to AMERISAFE materials and content. Once selected, each page will open in a separate browser window.

Submissions Widget

<https://geaux.amerisafe.com/umagent>

In GEAUX 5.0, the Submission Widget was designed to save the user time all with ease of use in mind. Users now have single click capability, a navigational sidebar within the application, more prominent icons and much more.

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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:
 - Selecting *Save Filter As* in the Submission header
 - Enter New Filter Name
 - Save

**Please visit http://go.amerisafe.com/geaux-videos?hs_preview=yUZvhOyJ-7720329570 to access a quick tutorial on custom filters

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
 - General information
 - Rating Elements
 - ACORD Questions
 - Prior Carrier Information and Loss History
 - Supplemental Information
- Proposals
- Policy

Each section with the exception of the policy has variable options to print, save, Email, and download. The policy can be viewed/printed/downloaded from the file tab located within the collaboration tools.

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.

Administrator Access Changes

<https://geaux.amerisafe.com/umagent>

One of the more significant changes in GEAUX 5.0 is Administrator access. Administrative duties can now be done within the agent portal; eliminating the need for separate usernames/passwords and multiple websites.

- User having admin rights only will continue to login with current admin username/password
- User having admin and agent rights will login with the agent login
- System allows for multiple administrators

**To access a quick tutorial on the Administrative process, please visit http://go.amerisafe.com/geaux-videos?hs_preview=yUZvhOyJ-7720329570

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.

Deactivating 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*



GEAUX 5.0 Changes Guide

GEAUX Assistance

<https://www.amerisafe.com/contact/#online-services-team>

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

800.897.9719 / aiic-mktg@amerisafe.com

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