



America's small business insurance specialist®

EACCESS® INQUIRY AND SERVICE PORTAL REFERENCE GUIDE

Your User Name:

Your Password:

NAVIGATION TIPS

Home	Will take you back to the EACCESS home page
Inquiry	Will take you to Policy and Billing inquiry options for your clients
Media View	An option to view all paper policyholder correspondence sent by EMPLOYERS®
Loss Analysis	Will take you to the section where you can view Book of Business, Agency Loss Information and Loss Runs

POLICY INQUIRY

Search for Policies, Endorsements, Renewals

Policy Inquiry	Allows you to pull up all policies
Policyholder's Name	Allows you to search by policyholder name
Policy Number	Allows you to search by policy number, for example: EIG 1234567 02
<ul style="list-style-type: none"> ▪ WC Policy Inquiry Screen ▪ Associated Documents 	Will contain a link to all imaged documents for the policyholder Documents include: Policy, Invoices, Endorsements/Audits, Reminder Notices, Cancellations, etc.

BILLING INQUIRY

Research Billing Issues

Search	Provides a list of all policies
Policyholder's Name	Provides specific information about an insured's policy
Billing Detail	Provides billing information on a particular policy
Policy Number Link (hyperlink)	Provides policy inquiry information (link to WC Policy Inquiry screen)
Billing Detail Screen:	Provides information on Pay Plan, Total Collectible Amt, Total Paid Amt, Invoice Date, Current Amt Due, Date Due, Next Inst. Amt, Next Invoice Date, last PMT Posted

*MEDIA VIEW™

View Policy Documents

Media View™ Inbox:	View a snap shot of all correspondence(s) with policyholder(s) within the past month. Documents include: Invoices, endorsements, reminder notifications, cancellation(s), reinstatement(s), etc. in PDF Format
From Date/To Date	Click on Calendar to change dates
Update	Will update page based on changes made
Previous/Next	Allows you to navigate from previous page to the next page
Document Search	Allows you to pull up/view policy documents
Note: Suppress Print is available, ask your Field Underwriter/ Sales Executive for more information.	

LOSS ANALYSIS

View Book of Business/View Loss Runs

Select Agency	Produces a list of all policies that have been written under selected Agency Code
Producer Summary	Agency Summary Report: Provides name of policies, EAP, Earned Premium, Claims, Loss Ratio
<ul style="list-style-type: none"> ▪ Policy Inception Year 	Allows you to select current Active Policies or certain Policy Years
Loss Reports	Provides a link to Book of Business or Producer Summary Report to access Loss Runs
<ul style="list-style-type: none"> ▪ Search by Name/Policy Number ▪ Active Only 	Allows you to search by named insured, policy number Will return only in force policies
Insured Name	Allows you to generate a Policy Summary based on the highlighted policy
<ul style="list-style-type: none"> ▪ View Claims ▪ Reports 	Provides detailed claims info Link in left column allows you to download detailed Loss Run Reports and Summary Reports

Navigation Tips: 1. Use Tab key to move within a screen 2. Use Red Arrows to move forward/back and save information 3. Utilize Index Links (bottom of page) 4. Any field preceded by an asterisk (*) is required 5. Select Glossary to view list of Terms and Acronyms

SUPPORT

Password Reset	Please contact your Agency Administrator: _____
Questions/Feedback on EACCESS	Contact your Field Underwriter/ Sales Executive: _____

EACCESS® New Business Submission Reference Guide

CLASS ELIGIBILITY

This area allows you to determine if the risk meets EMPLOYERS® Underwriting Appetite. If the account is acceptable, the user can proceed with the quoting process. If prohibited, no further action is required. It also provides a manual premium indication without any pricing or underwriting considerations.

Class Code or Description Allows you to enter the class code or the first few letters of the class description to select the class code.

APPLICANT INFORMATION

Location/Master Company/ Policy Company Determines which EMPLOYERS company will be quoted. One location will be selected as the Agency Default.
Primary State Allows you to select the primary state of risk being inputted.
Site Address The physical address of the risk submitted. If the mailing address is different, check the box to indicate.
Phone Number No dashes required.
FEIN No dashes required.
Application Name This is the legal name of the risk. No punctuation should be used.
Doing Business As If additional room is needed, it can be added to the additional interest page later in the instructions.
City, State, Postal Code Use drop down to select state for the physical location. A minimum of 5 digits is required.

OPERATIONS OF APPLICANT Answering 'yes' to any of these questions will cause an automatic decline.

POLICY INFORMATION

Payment Plan Allows you to select from a list of payment plans
Effective Date Produces a calendar or enter date (mm/dd/yyyy)
Term Allows you to indicate the term of the policy. Default is 12 months
Expiration Date Defaults to Next Day
WC Line of business Defaults to Voluntary
Audit Type and Audit Frequency Defaults to Physical and Annual respectively
Employers Liability Allows you to select EMPLOYERS liability plan from list approved by the state
Years in Business To indicate number of years entity has been in business
Years of Industry Experience To indicate the number of years of management experience in the insured's field
Legal Entity Use drop down to select
Standard Commission/ Commission Override Defaults
Description of Operations Detailed description of operations, add additional comments in question 18 of Insured Statement
Number of Locations Indicates how many locations the risk has
NAICS Code/ Code Search/ Description Allows you to enter the NAICS Code or part of the code description. (e.g. Rest = restaurants or offi = office)

STATE INFORMATION

Available States Shows states available if the risk being submitted is in multiple states
Selected States Defaults to the main state of the risk being submitted
of Employees Per State Indicates how many employees are working in the state indicated on this page
Experience Mod Shows the current experience modifier if applicable
Anniversary Exp Mod Shows the experience modifier for the next policy term (split mod)
NCCI or Bureau ID Required only if a risk has a credit/debit experience mod
Optional Modifications Use drop down arrow, highlight applicable mod, click "Add" to select and click "Refresh"
Schedule Credit/ Debit Information This is not an option through EACCESS, please contact your Underwriter for pricing considerations

CLASS CODES

Select Current State Defaults to your state
Class Code Shows class code input or the result of selecting the description input after selecting class search
Description Shows the description of the class code inputted or selected

CLASS OPERATIONS Underwriting questions determined by certain class codes inputted

LOSS HISTORY Prior carrier information is required to proceed with application

INSURED'S STATEMENT If 'yes' is answered to any question, please include remarks

BINDING COVERAGE Allows you to choose the account from Quote index and click "Bind"

LOCATION- Only Required at Binding

Select Location Defaults to location #1; to add a location select "Add Additional Site"
FEIN Allows you to input the FEIN for that location
Number of Employees Allows you to input the number of employees for that location
Name Named insured for that location
Physical Address Physical location
City, State, Postal Code Defaults to caps; Use drop down box for state, minimum of 5 digits for postal code
Repeat for each location by using drop down for Select Site

OWNER/ OFFICER INFORMATION - Only Required at Binding

Click on Included/Excluded tab on Location Information page
Select Number Will default to location #1
Name Include a complete name
Title Use drop down to select title
Ownership % Enter ownership percentage
Salary Input salary
Included/Excluded Use drop down to select

ADDITIONAL INTEREST / LOCATION INFORMATION - Only required at Binding

(From the Location Information page - Right arrow or select the hyperlink "Interests")

Submit (From the Additional Interests page- right arrow or select hyperlink "Submit". Or from quote index, click the radio button, then "Bind")