EMPLOYERS®

EACCESS® Agent Training Guide

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Contents

Initial Login

To login the first time, you will click on "EACCESS Sign In" from the www.employers.com homepage or log-in directly by visiting eaccess.employers.com.

Note: EMPLOYERS sites and tools perform best when using the Google Chrome browser.

Login Page

Once on the login page, enter your existing EACCESS username and click Next.

The system will display a message regarding security measures and will prompt you to enter your password.

Then you will enter your current password and click "Sign In."

Next you will be required to select a two-factor authentication method with a choice between SMS Authentication (Text) or Voice Call Authentication.


After you receive and enter the code, you will be required to update your password by entering your old password, followed by your new password and confirming the new password. After selecting verify, you will be directed to the new EACCESS Dashboard.

Need help signing in?

We are now offering the ability to self-serve if you have forgotten your password or locked your account. You must choose an authentication method and enter the relevant information. After you receive and enter the code, you will update your password and your account will be unlocked.


Selecting the "Need help signing in?" option will expand the self-serve options.
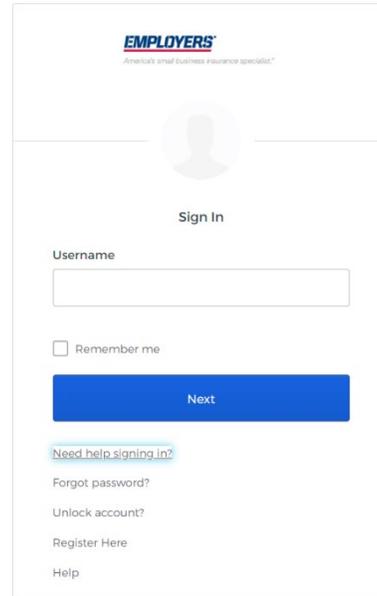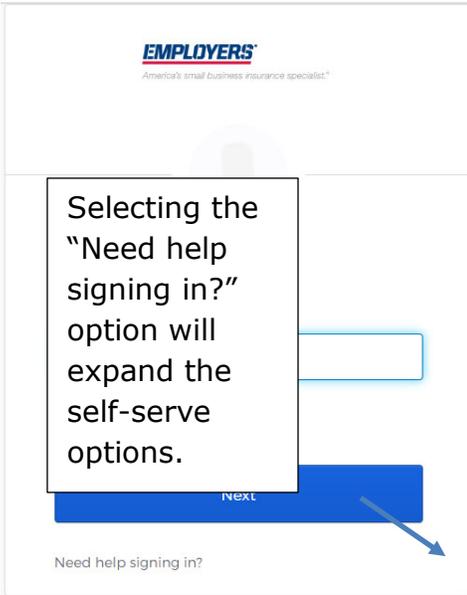
Forgot Password

When you select "Forgot Password," you will have the option of resetting the password by entering your username and selecting an authentication option to reset.
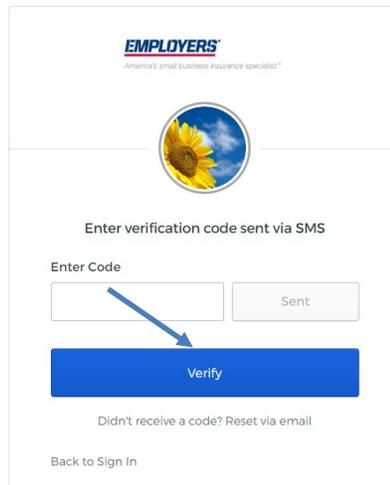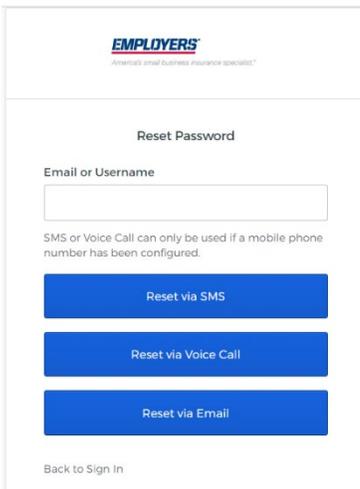
Once you have selected the method, the system will prompt you to enter the code.

Once you have entered the code and selected "Verify," you must enter a new password that meets the system requirements.
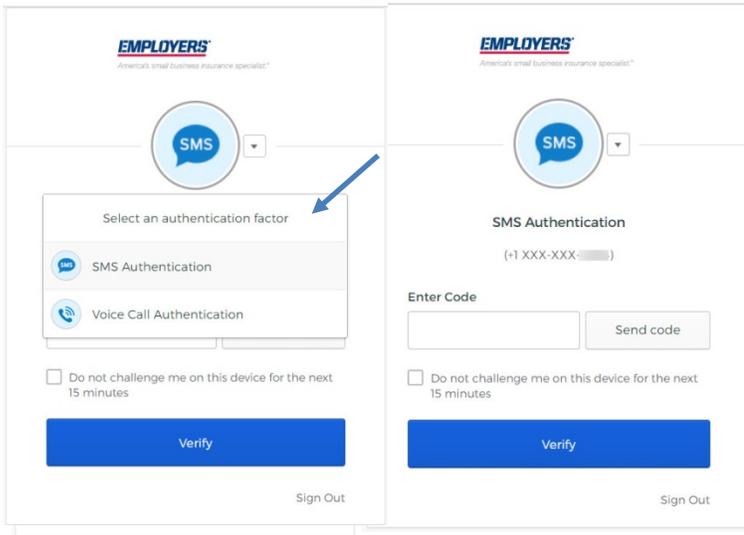

When you have entered the new password and selected "Reset Password," you will be prompted for another code for verification.

You can use the drop-down arrow to choose the method of authentication. You will then enter in the verification code and select "Verify." You will then be directed to the EACCESS dashboard.

Unlock Account

When you receive a warning that your account is locked, you can select the "Unlock account" option.

Enter the email or username and select an option to unlock the account.

Once the system has verified the code, the account will be unlocked and then you will be able to sign back in with your valid credentials.
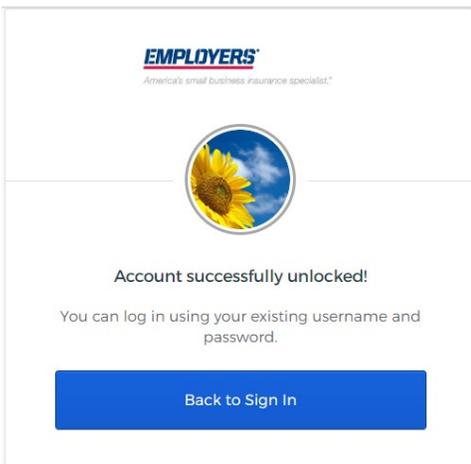
EACCESS Dashboard

The EACCESS dashboard has been updated with a more modern look and feel. It has been redesigned with easier navigation to the self-service tools EMPLOYERS offers. The dashboard has three main sections; the left-hand navigation, center display and right–hand reference materials.
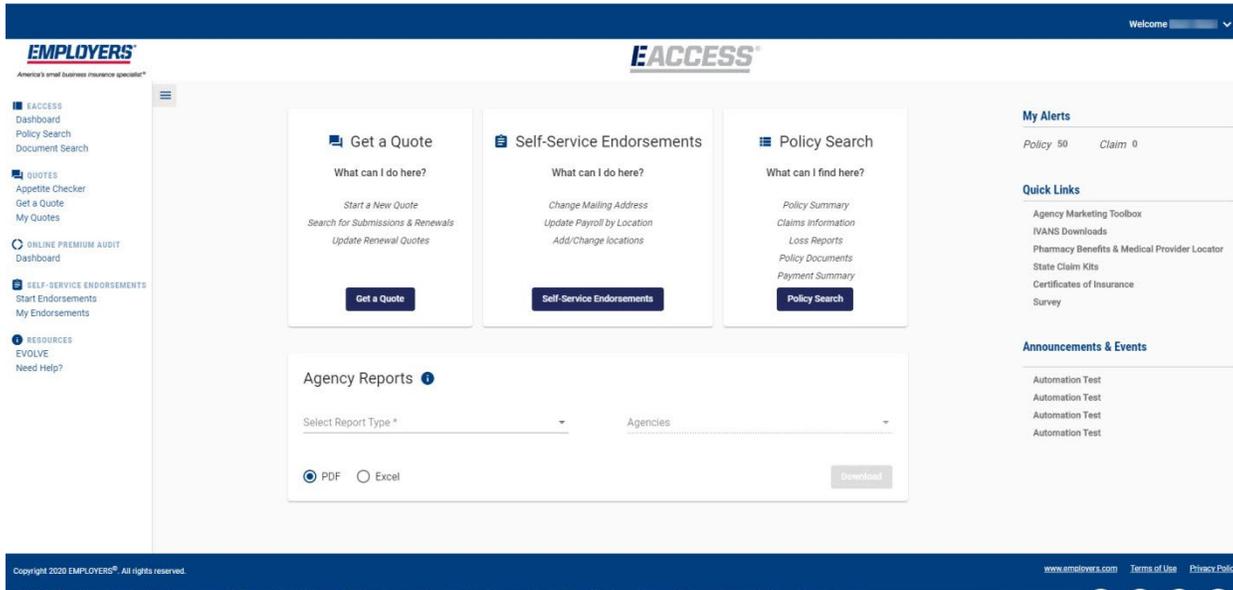
Left-Hand Navigation

The left-hand navigation menu is new to EACCESS and is common across several EMPLOYERS self-service tools. This will allow you to search policies within your book of business, search for associated documents and navigate back and forth between the other tools as you access information to service your clients and conduct business.

Center Dashboard

The center display provides easy access to primary self-service tools. Click on the button within each card to navigate to that tool or search functionality.

![EMPLOYERS logo]

Agency Reports

The lower section of the center dashboard is where you can find Agency-level reports.

Agency level reporting is centralized and made available on the dashboard for ease of access. Agency Summary, Annual Agency Summary and Book of Business reports can be accessed here. If you have the appropriate access, the Commission Statement can also be downloaded.
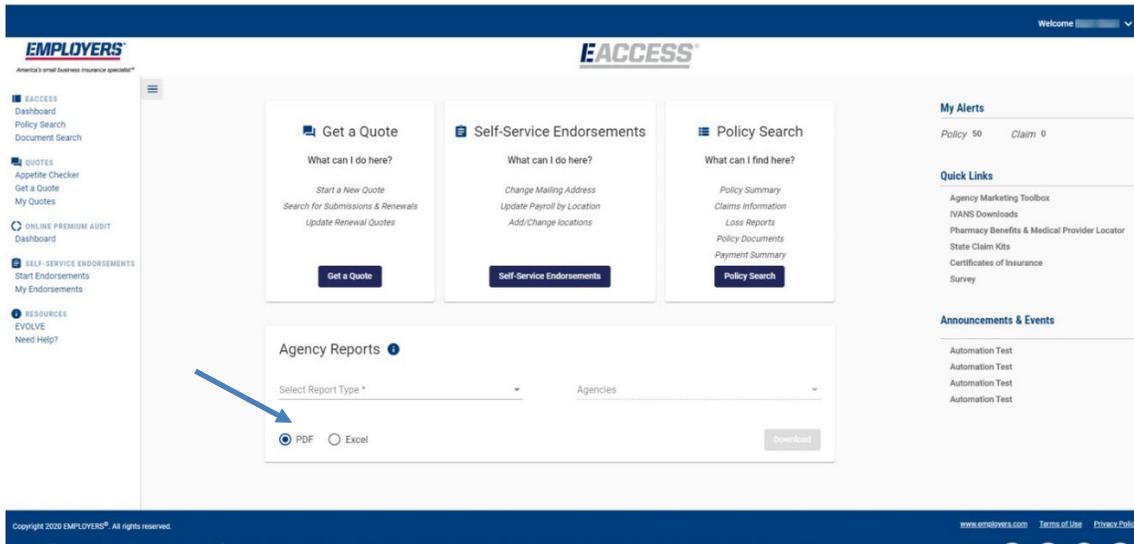
To download a report, you will select the report type. Agency Summary will prompt you to select the inception year and the Agency code. Annual Agency Summary and Book of Business will prompt you to select which agency/agencies to run the report for. For those with access to the Commission Statement, you will select the month, year and which agency/agencies to be downloaded. Next, click "Download." A dialog box will appear and select "Save." Next, a PDF or Excel download box will appear in the lower left-hand corner. Click on it, and the selected report will open.

Note - For the Commission Statement report, we only provide access going back 2 years from the current month.
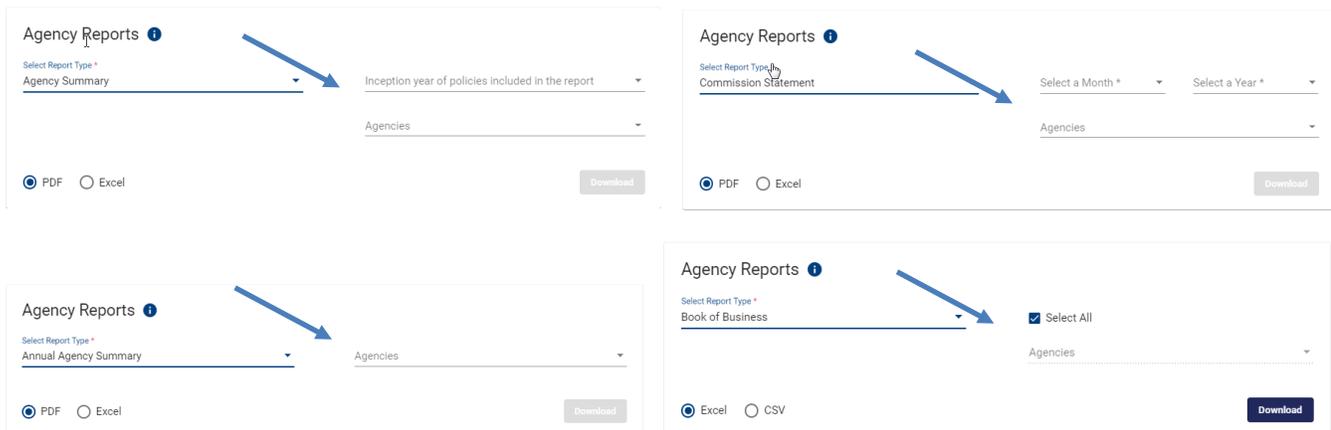
My Alerts

The "My Alerts" section provides a snapshot of the Alerts for your Book of Business. They are categorized by Policy and Claim. When you click on the number next to the category, the screen will refresh with relevant alerts listed.

If you would like to view a particular alert type or one associated with a specific Policy, you can sort the Alerts by clicking on any of the column headers. The Details column provides a brief description of the alert which is intended to assist you with determining the appropriate action to take. You can click on the Policy Number which will direct you to the Policy Summary screen to see more policy detail and information about the cause of the Alert.

Quick Links

The Quick Links section provides you with quick access to tools and information.

Announcements & Events

This section provides current EMPLOYERS news and notifications of upcoming events.

Policy Search

We have moved to a search format that is less field-specific, favoring a free form approach. You can search using the data from any of the columns. As you enter the search criteria, the results will pair-down with each additional character after the 3rd character entered. A maximum of 30 characters can be entered for a search.

You can sort the data by clicking on the column headers.
Selecting a Policy will navigate you to the Policy Summary tab.

Policy Summary

Once a Policy is selected from the Policy Search you will be directed to the Policy Summary tab.

The information provided is for the most recent Policy period. If applicable, you can choose a different term from the dropdown on the upper left corner of the Policy Summary screen.

We also provide a "View all policy terms" selection for those who want to see all available periods on the screen.

The header provides information about the First Named Insured and the Agency.

In the center we have high level policy information.

The next section is the location or locations, if applicable, which provides the address, class codes and associated payroll.

Claims

The Claims tab provides the same Policy period access to Claim information beginning with the compensation benefits.

To see the Claim detail, click anywhere on the banner with the Claim number and the Injured Worker's name.

To collapse the information, click on the up arrow toward the right.

We also provide a Payment Summary which lists payments associated with the Claim.

Reports

You can download Policy level reports from the Reports tab. To download a report, you would select the report type from the dropdown, the report format and then select "Download."

For the Loss Trend Analysis, you are required to select an Inception Year. After download is selected a dialog box will appear. Click "Save."
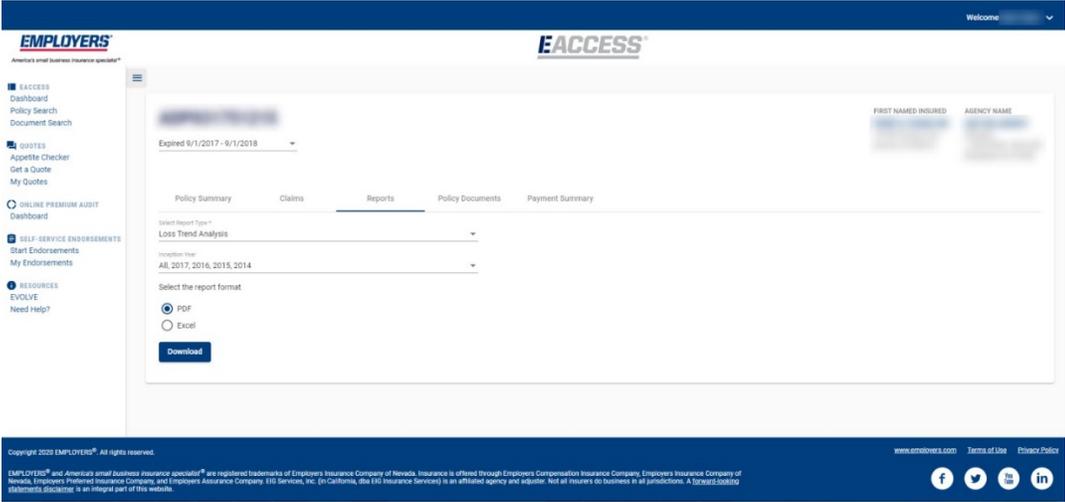
Then you will click on the Adobe or Excel download box which will appear in the lower left-hand corner to open the report.
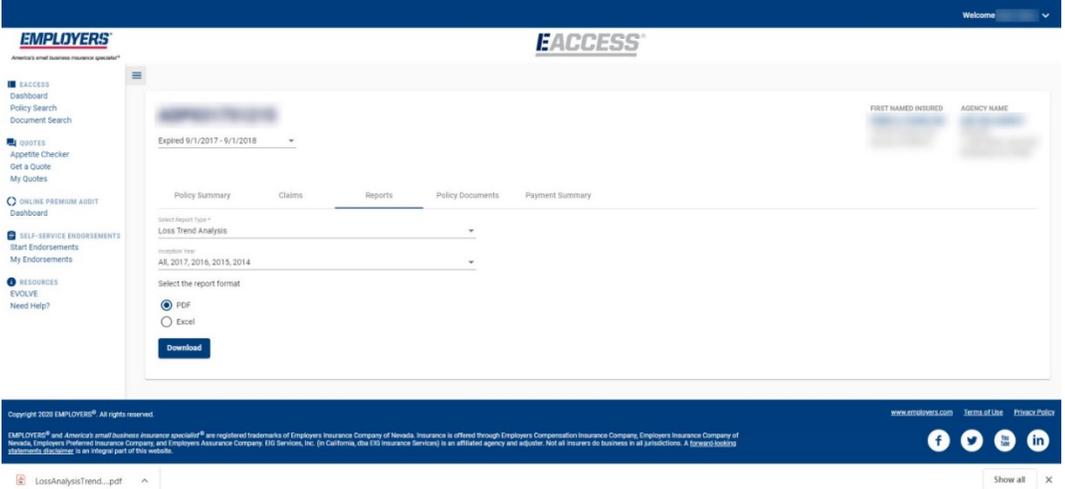
Policy Documents

The Policy Documents tab provides you with access to policy related documents for the policy term selected from the dropdown. You can sort the information by any of the columns from "Document Type" to "Effective Date". Once the document is located, it can be downloaded to view, save or print.
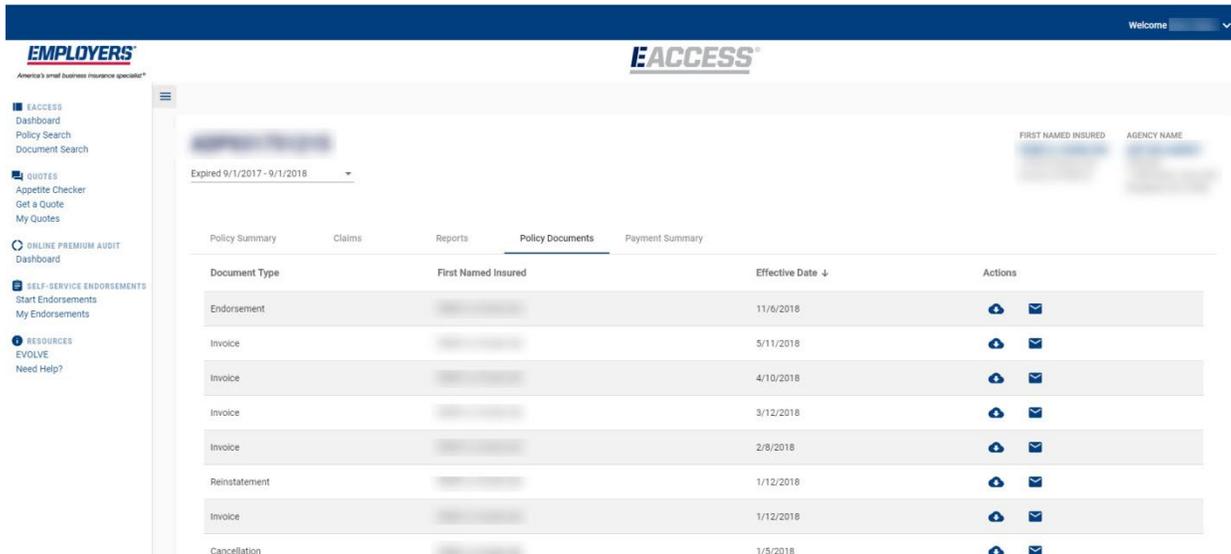
To download a document, you would click on the cloud icon and select the version.
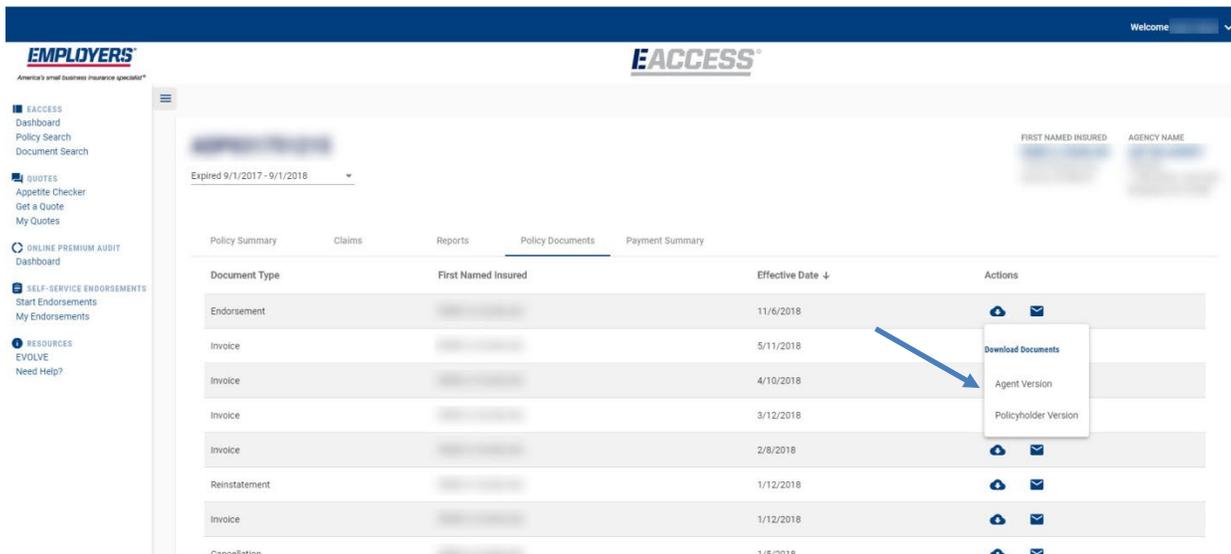
After selecting the version, a dialog box will appear and select Save.
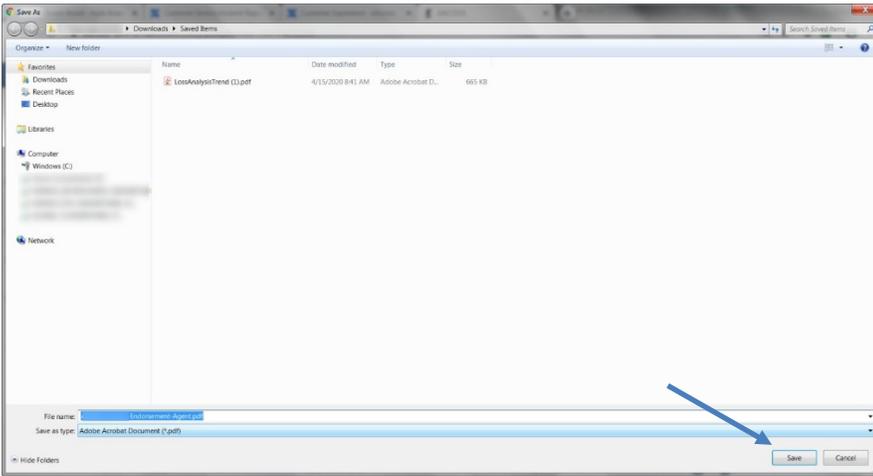
Next, you will click on the Adobe or Excel box which will appear in the lower left-hand corner to open the document.
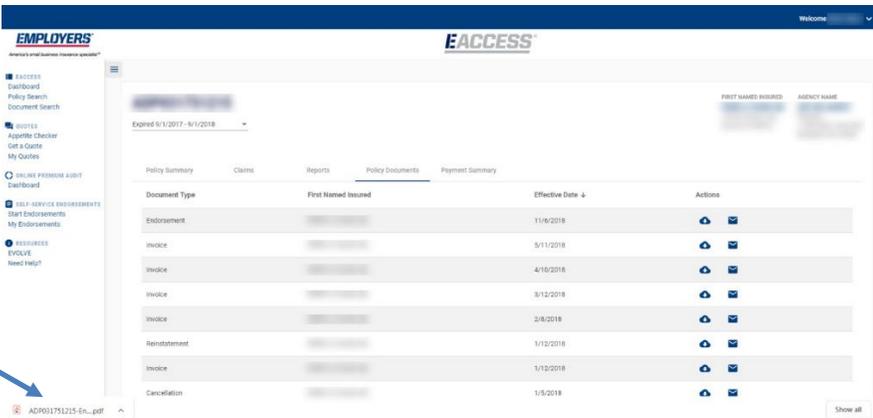
Payment Summary

The Payment Summary tab provides a snapshot of payment related information. You can quickly view the status of the Policy and if it is current or past due.
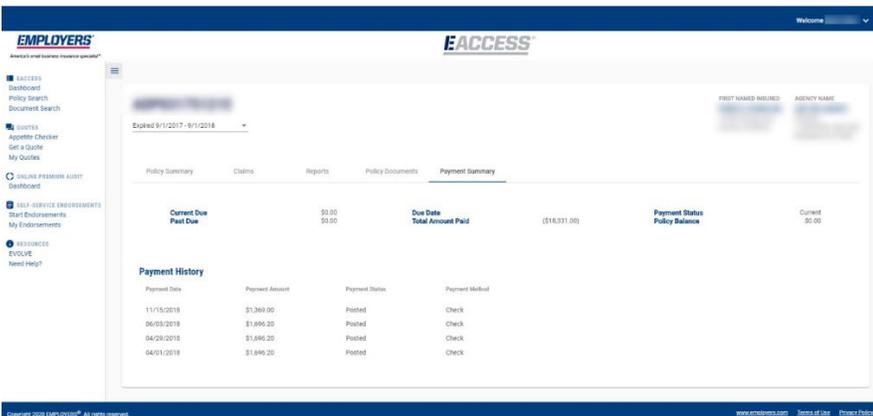
We also provide a payment history of the last four payments posted, if applicable. Your Policyholders also have access to a View Billing Details link which directs them to where they can view their complete payment history and installment schedule, if any. This functionality will be made available to Agents this summer.

Document Search

Document Search is similar to a Policy Search, but it allows you to search by Quick Search or Search by Date. Quick Search functions the same as the Policy Search in terms of the search format, search criteria, and pairing-down. Both search methods allow for the ability to sort the data by clicking on the column headers.

You can search for and download documents. You can sort the information by any of the columns from Policy Number to Effective Date. As in Policy Search, you can search by criteria to locate the document to download to view, save or print.

Downloading a Document

To download a document, click on the cloud icon and select the version.
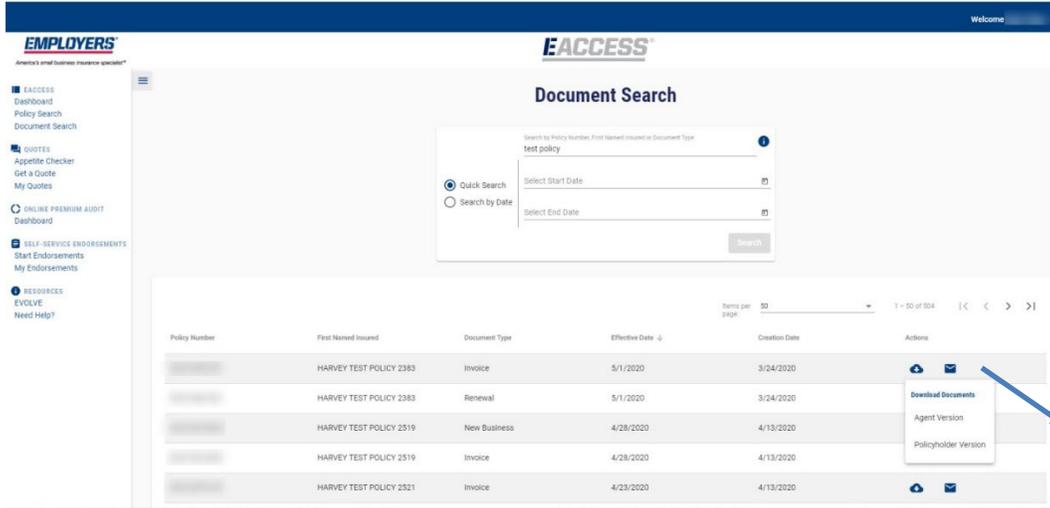
After selecting the version, a dialog box will appear and select Save to download.
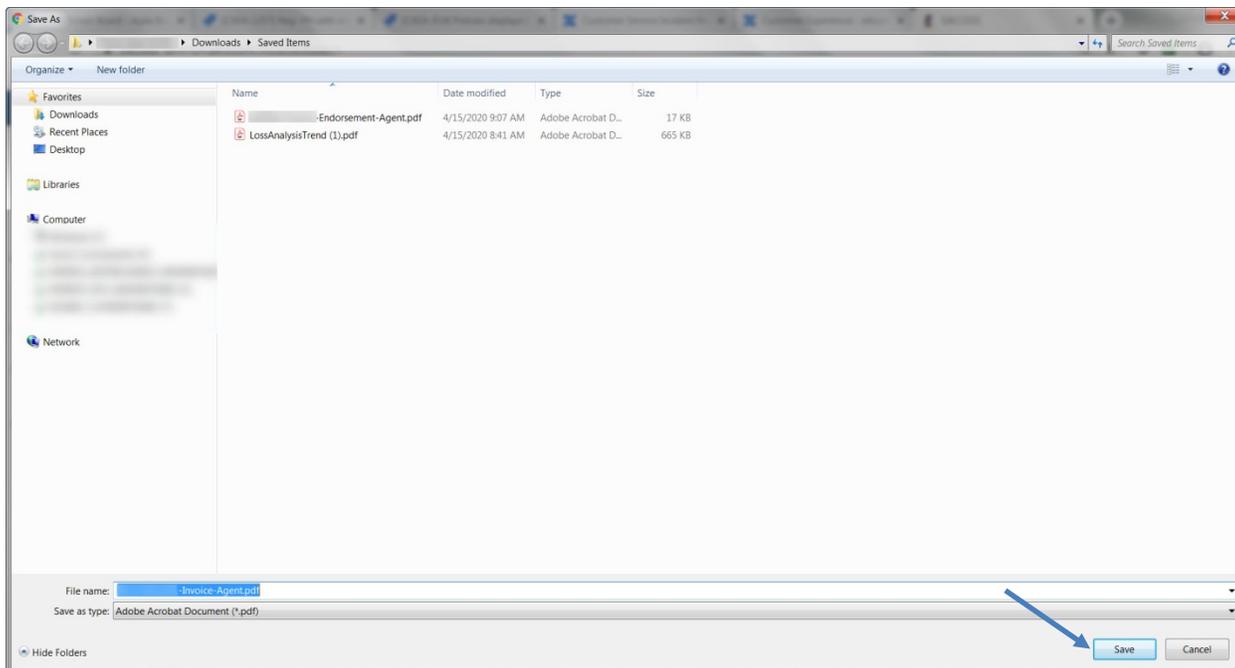
Next click on the Adobe or Excel download box which will appear in the lower left-hand corner to open the document.
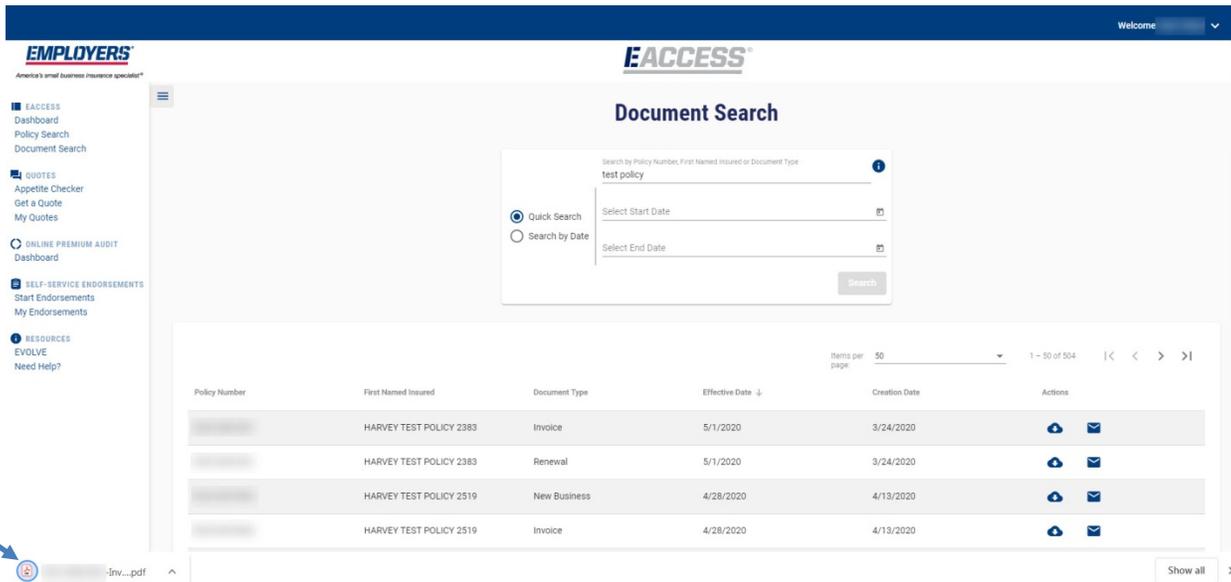
Your selected document will open in the selected format.

E-Mailing a Document

You can e-mail documents directly from the system. To e-mail a document, click the envelop icon and select the version.
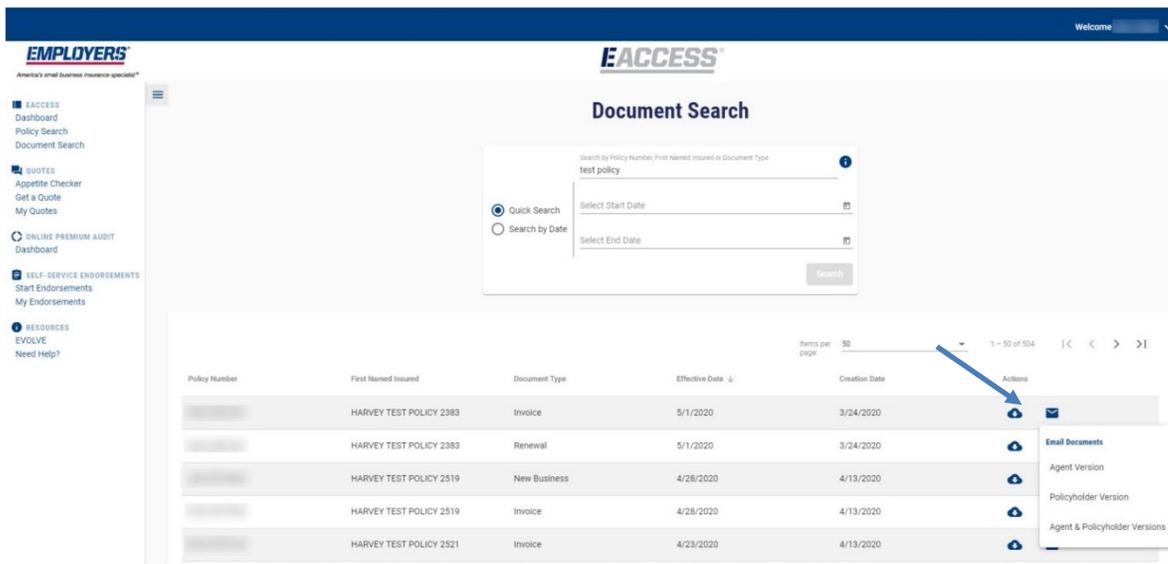
The Document Email box will appear. The system will default the "From" field to the e-mail address of the logged-in user. You have the option to change it to another valid e-mail address. This is being offered so you can brand the e-mail and have it coming from a recognized sender. If left blank, it will be sent with a no reply address.

Next enter the e-mail address to which the document is to be sent. Click "Email" and a dialog box will appear once it has been sent.

Resources
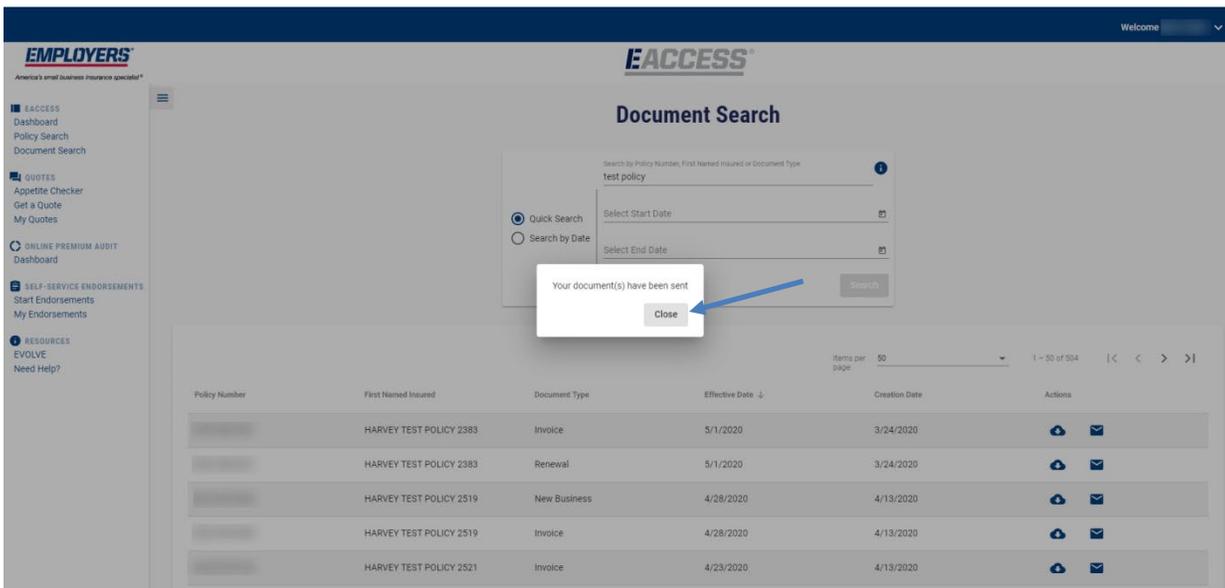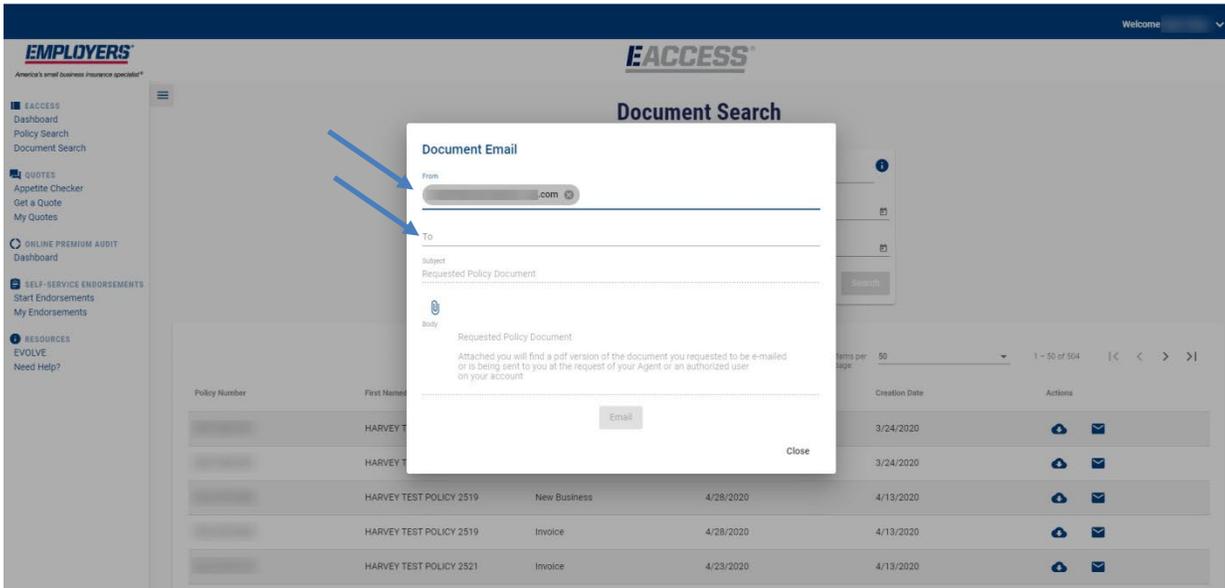
Visit https://www.employers.com/insurance-agents/eaccess-help to access short 'how to' videos and additional training materials.

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