

**EMPLOYERS**

**EACCESS**<sup>®</sup> Agent Training Guide

## Contents

|   |       |
|---|-------|
| Initial Login .....                     | 2     |
| <b>Login Page</b> .....                 | 2-3   |
| <b>Need help signing in?</b> .....      | 4-5   |
| EACCESS Dashboard .....                 | 7     |
| Left-Hand Navigation .....              | 7     |
| <b>Center Dashboard</b> .....           | 7     |
| <b>Agency Reports</b> .....             | 8     |
| <b>My Alerts</b> .....                  | 9     |
| <b>Quick Links</b> .....                | 10    |
| <b>Announcements &amp; Events</b> ..... | 10    |
| Policy Search .....                     | 11    |
| <b>Policy Summary</b> .....             | 11-18 |
| Document Search.....                    | 19    |
| <b>Downloading a Document</b> .....     | 19-20 |
| <b>E-Mailing a Document</b> .....       | 21-22 |



## Initial Login

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

**EMPLOYERS**  
America's small business insurance specialist.

**Sign In**

Username

Password

Remember me

**Sign In**

Need help signing in?

---

**EMPLOYERS**  
America's small business insurance specialist.

**Set up multifactor authentication**

Your company requires multifactor authentication to add an additional layer of security when signing in to your account

**SMS Authentication**  
 Enter a single-use code sent to your mobile phone.

**Voice Call Authentication**  
 Use a phone to authenticate by following voice instructions.

---

**EMPLOYERS**  
America's small business insurance specialist.

**Receive a code via SMS to authenticate**

United States

Phone number  
 +1

Enter Code

**Verify**

[Back to factor list](#)

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

**EMPLOYERS**  
America's small business insurance specialist.

**Your password needs to be reset**

Password requirements: at least 8 characters, a lowercase letter, an uppercase letter, a number, a symbol, no parts of your username, does not include your first name, does not include your last name. Your password cannot be any of your last 4 passwords.

Old password

New password

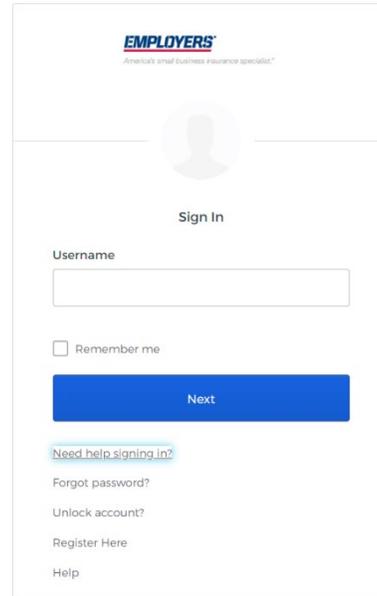
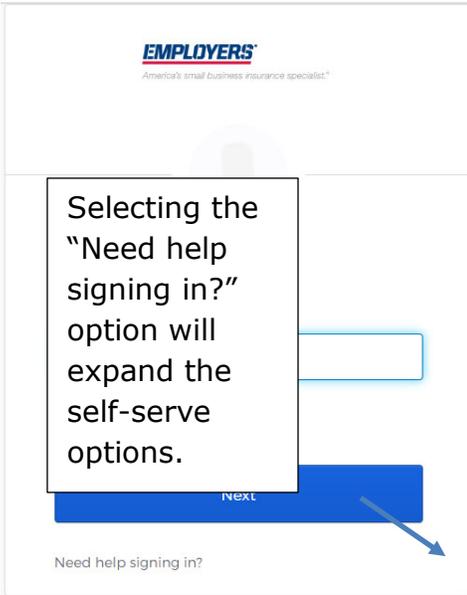
Repeat password

**Change Password**

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.

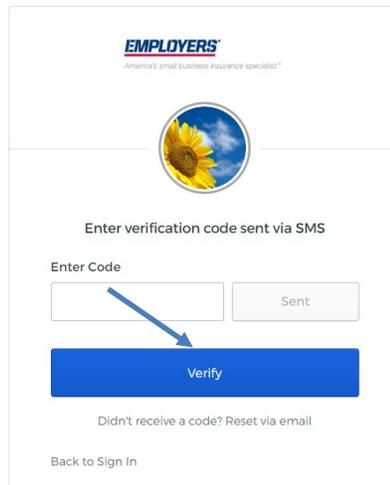
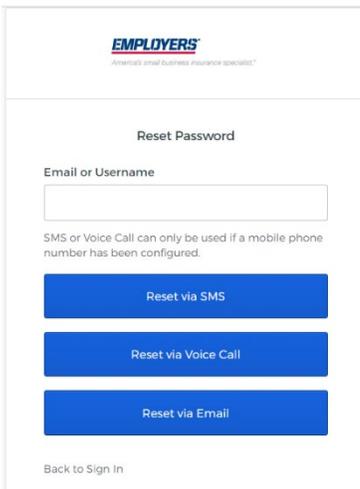
## Need help signing in?

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.



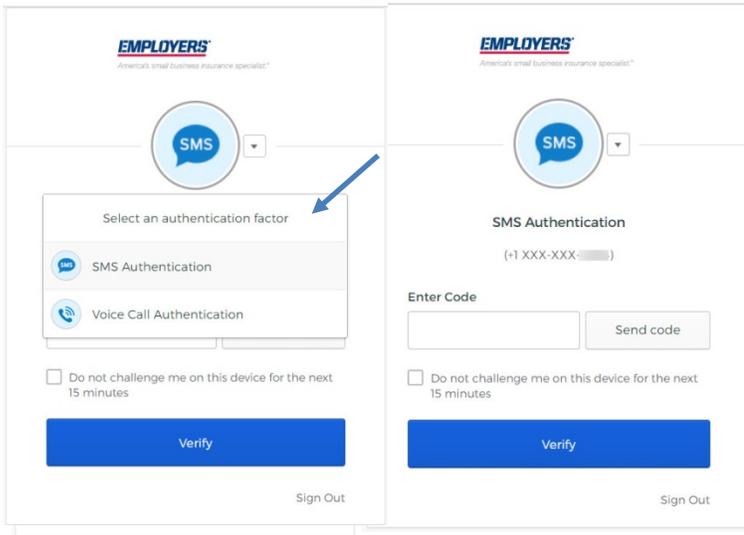
## Forgot Password

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.

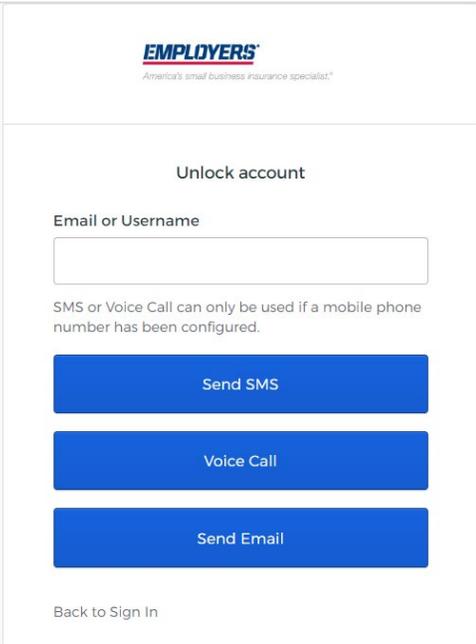


When you have entered the new password and selected "Reset Password," you will be prompted for another code for verification.

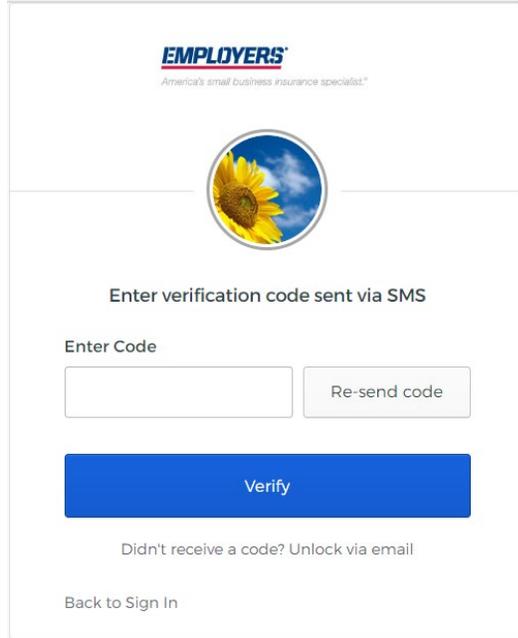
You can use the drop-down arrow to choose the method of authentication. You will then enter in the verification code and select "Verify." You will then be directed to the EACCESS dashboard.

## Unlock Account

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



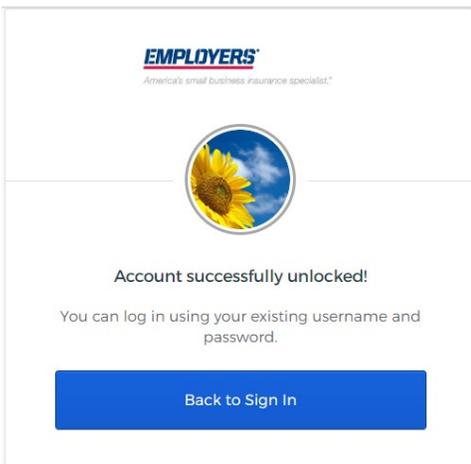
The screenshot shows the 'Unlock account' page. At the top is the EMPLOYERS logo with the tagline 'America's small business insurance specialist.' Below the logo is the heading 'Unlock account'. There is a text input field labeled 'Email or Username'. Below the field is a note: 'SMS or Voice Call can only be used if a mobile phone number has been configured.' There are three blue buttons: 'Send SMS', 'Voice Call', and 'Send Email'. At the bottom left is a link 'Back to Sign In'.



The screenshot shows the 'Enter verification code sent via SMS' page. At the top is the EMPLOYERS logo with the tagline 'America's small business insurance specialist.' Below the logo is a circular image of a sunflower. The heading is 'Enter verification code sent via SMS'. There is a text input field labeled 'Enter Code' and a 'Re-send code' button. Below these is a large blue 'Verify' button. At the bottom is a link 'Back to Sign In' and a note: 'Didn't receive a code? Unlock via email'.

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

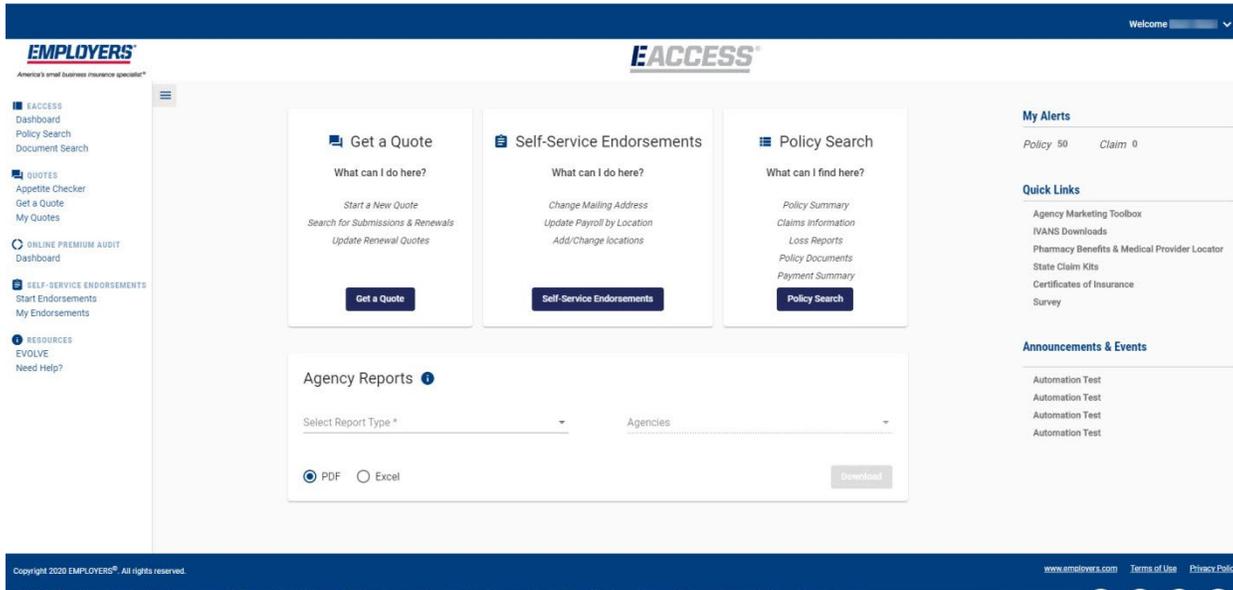
Once the system has verified the code, the account will be unlocked and then you will be able to sign back in with your valid credentials.



The screenshot shows the 'Account successfully unlocked!' confirmation page. At the top is the EMPLOYERS logo with the tagline 'America's small business insurance specialist.' Below the logo is a circular image of a sunflower. The heading is 'Account successfully unlocked!'. Below the heading is a message: 'You can log in using your existing username and password.' At the bottom is a blue 'Back to Sign In' button.

## 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.

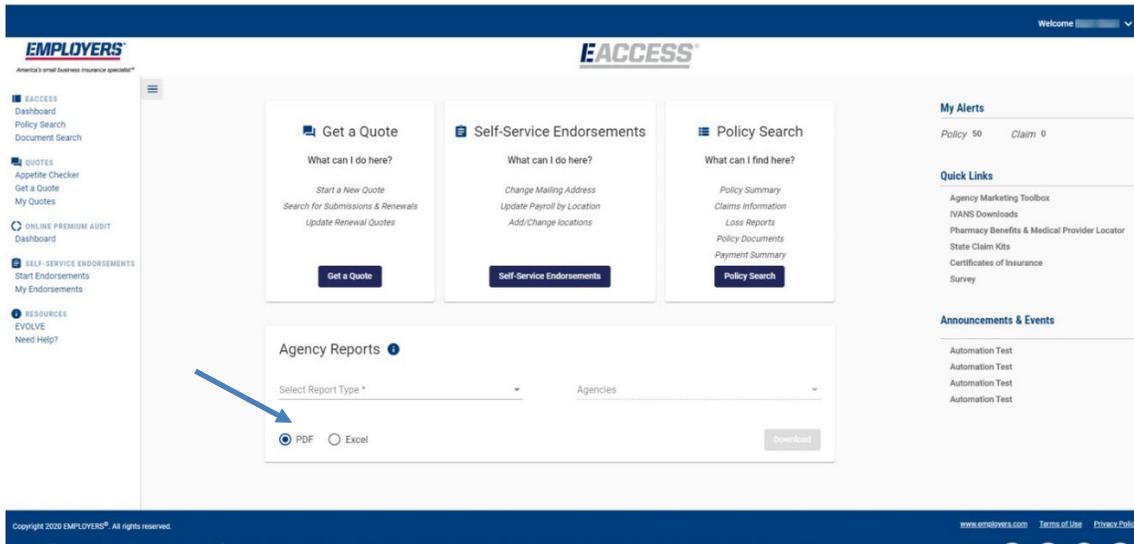
## Center Dashboard

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.

## Agency Reports

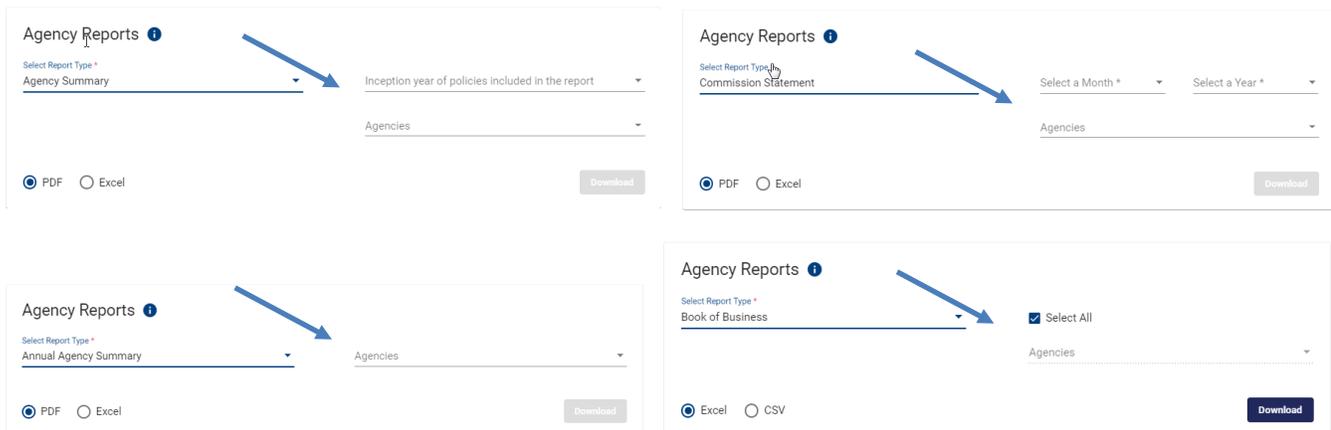
The lower section of the center dashboard is where you can find Agency-level reports.

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.

The screenshot shows the EACCESS dashboard with a navigation menu on the left. The main content area has three columns: 'Get a Quote', 'Self-Service Endorsements', and 'Policy Search'. Below these is an 'Agency Reports' section with a dropdown for 'Select Report Type' and radio buttons for 'PDF' and 'Excel'. On the right side, the 'My Alerts' section is highlighted with a blue arrow, showing 'Policy 50' and 'Claim 0'. Below it are 'Quick Links' and 'Announcements & Events' sections.

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.

The screenshot shows the 'Alerts' table in the EACCESS system. The table has columns for 'Alert Type', 'Alert Date', 'Policy Name', 'Policy Number', and 'Details'. There are five rows of data, all labeled 'POLICY ALERT'. The 'Alert Date' column shows dates from 04/01/2020 to 03/30/2020. The 'Policy Name' column shows 'HARVEY TEST POLICY 2413'. The 'Policy Number' column shows a redacted number. The 'Details' column shows that the policy is 'PAST DUE and in EXPIRED status'. Blue arrows point to the 'Alert Type', 'Policy Name', and 'Policy Number' columns. The table also includes a 'Items per page' dropdown set to 5 and a '1 - 5 of 50' indicator.

## Quick Links

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

The screenshot shows the EMPLOYERS EACCESS dashboard. The top navigation bar includes the EMPLOYERS logo, the EACCESS logo, and a 'Welcome' dropdown menu. The main content area is divided into several sections: 'Get a Quote', 'Self-Service Endorsements', 'Policy Search', and 'Agency Reports'. On the right side, there is a 'My Alerts' section showing 'Policy 50' and 'Claim 0', and a 'Quick Links' section with a blue arrow pointing to it. The 'Quick Links' section contains the following items: Agency Marketing Toolbox, IVANS Downloads, Pharmacy Benefits & Medical Provider Locator, State Claim Kits, Certificates of Insurance, and Survey. Below this is an 'Announcements & Events' section with four 'Automation Test' entries. The footer contains copyright information and links to the website, terms of use, and privacy policy.

## Announcements & Events

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

This screenshot is identical to the one above, showing the EMPLOYERS EACCESS dashboard. The 'Announcements & Events' section is highlighted with a blue arrow. This section contains four entries, each labeled 'Automation Test'.

## 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 3<sup>rd</sup> 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.

| Reports | Policy Documents   | Payment Summary               | FIRST NAMED INSURED |                        | AGENCY NAME                |                         |                     |
|---------|--------------------|-------------------------------|---------------------|------------------------|----------------------------|-------------------------|---------------------|
| 45.00   | EAP<br>\$16,962.00 | Earned Premium<br>\$18,331.00 | Claims<br>2         | Total Paid<br>\$899.00 | Total Incurred<br>\$899.00 | Net Expenses<br>\$33.00 | Loss Ratio<br>5.10% |

Location 1 [dropdown]

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

| Reports | Policy Documents   | Payment Summary               | FIRST NAMED INSURED |                        | AGENCY NAME                |                         |                     |
|---------|--------------------|-------------------------------|---------------------|------------------------|----------------------------|-------------------------|---------------------|
| 45.00   | EAP<br>\$16,962.00 | Earned Premium<br>\$18,331.00 | Claims<br>2         | Total Paid<br>\$899.00 | Total Incurred<br>\$899.00 | Net Expenses<br>\$33.00 | Loss Ratio<br>5.10% |

Location 1 [dropdown]

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

In the center we have high level policy information.

The screenshot shows the EMPLOYERS EACCESS dashboard. The header includes the user's name 'Welcome [redacted]'. The main content area features a table with the following data:

| Exp Mod | Payroll        | EAP         | Earned Premium | Claims | Total Paid | Total Incurred | Net Expenses | Loss Ratio |
|---------|----------------|-------------|----------------|--------|------------|----------------|--------------|------------|
| .77     | \$3,262,145.00 | \$16,962.00 | \$18,331.00    | 2      | \$899.00   | \$899.00       | \$33.00      | 5.10%      |

Below the table is a 'Location 1' dropdown menu. The dashboard also includes a navigation menu on the left and a footer with copyright information and social media links.

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

The screenshot shows the EMPLOYERS EACCESS dashboard with detailed location information. The main content area features a table with the following data:

| Risk Class | Class Description                                  | Payroll        |
|------------|--|----------------|
| 4992 50    | DENTAL LABORATORY                                  | \$2,229,162.00 |
| 7380 50    | DRIVERS, CHAUFFEURS, MESSENGERS, AND THEIR HELPERS | \$102,643.00   |
| 8742 50    | SALESPERSONS OR COLLECTORS - OUTSIDE               | \$603,354.00   |
| 8810 50    | CLERICAL OFFICE EMPLOYEES NOC                      | \$326,986.00   |

The dashboard also includes a navigation menu on the left and a footer with copyright information and social media links.

## Claims

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

The screenshot shows the EACCESS interface with the Claims tab selected. The top navigation bar includes the EMPLOYERS logo, EACCESS logo, and a 'Welcome' dropdown. The left sidebar contains navigation options like Dashboard, Policy Search, and Quotes. The main content area displays a summary table for the policy period 9/1/2017 - 9/1/2018. The table includes columns for Medical (2), Indemnity (0), Recovery, Deductible, Total, and Claims (2). Below the table is a 'Claims' section with a list of claims. A blue arrow points to the first claim entry, which is partially obscured by a blurred name and location.

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

This screenshot shows the detailed view of a claim. The 'Claims' section is expanded, showing a table with columns for Injured Employee, Injury Date, Total Incurred, Total Recovery, Deductible, Total Paid, Total Reserve, and Net Expense. Below this table is a section for 'Date Closed', 'Examiner', 'Examiner Email', and 'Branch'. A blue arrow points to an up arrow icon in the top right corner of the claim detail banner, indicating how to collapse the information.

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.

The screenshot shows the EACCESS interface with a 'Payment Summary' table. The table has columns for Type, Description, Service Date, Paid, and Date Paid. Below the table, there is a 'Claim #' dropdown menu.

| Type    | Description            | Service Date | Paid     | Date Paid |
|---------|------------------------|--------------|----------|-----------|
| Expense | Bill Audit Fees (NCCI) | 2/1/2018     | \$5.94   | 2/15/2018 |
| Expense | Bill Audit Fees (NCCI) | 2/8/2018     | \$5.94   | 7/12/2018 |
| Expense | PPO fees (NCCI)        | 2/8/2018     | \$1.88   | 7/12/2018 |
| Expense | PPO fees (NCCI)        | 2/15/2018    | \$2.09   | 3/2/2018  |
| Expense | Bill Audit Fees (NCCI) | 2/15/2018    | \$5.94   | 3/2/2018  |
| Expense | PPO fees (NCCI)        | 2/1/2018     | \$2.10   | 2/15/2018 |
| Medical | Doctor visit           | 2/1/2018     | \$199.76 | 2/15/2018 |
| Medical | Doctor visit           | 2/8/2018     | \$198.74 | 7/12/2018 |
| Medical | Doctor visit           | 2/15/2018    | \$198.74 | 3/2/2018  |

## 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."

The screenshot shows the EACCESS interface for downloading reports. It includes a navigation menu on the left, a main content area with a 'Reports' tab selected, and a 'Download' button. A blue arrow points to the 'Download' button.

Expired 9/1/2017 - 9/1/2018

Policy Summary   Claims   **Reports**   Policy Documents   Payment Summary

Select Report Type \*

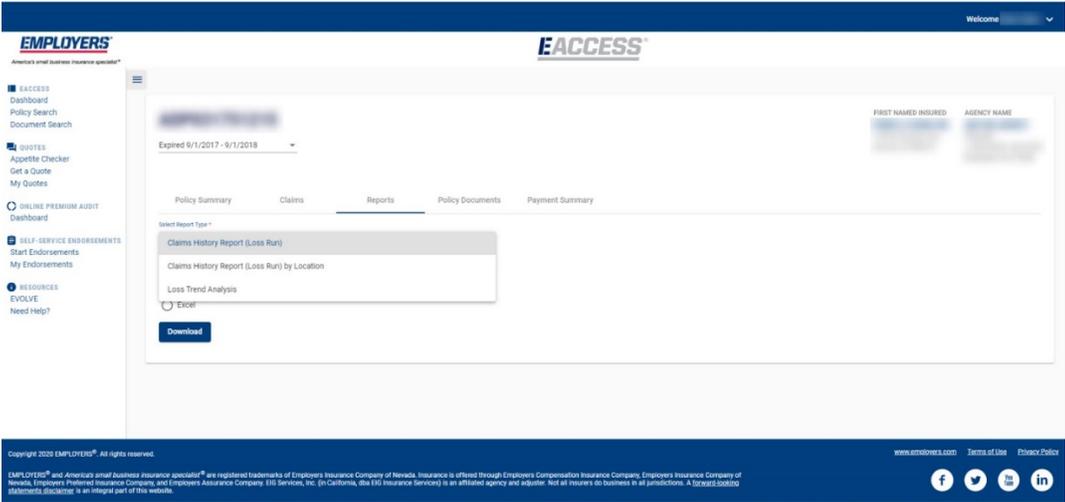
Select the report format

PDF  
 Excel

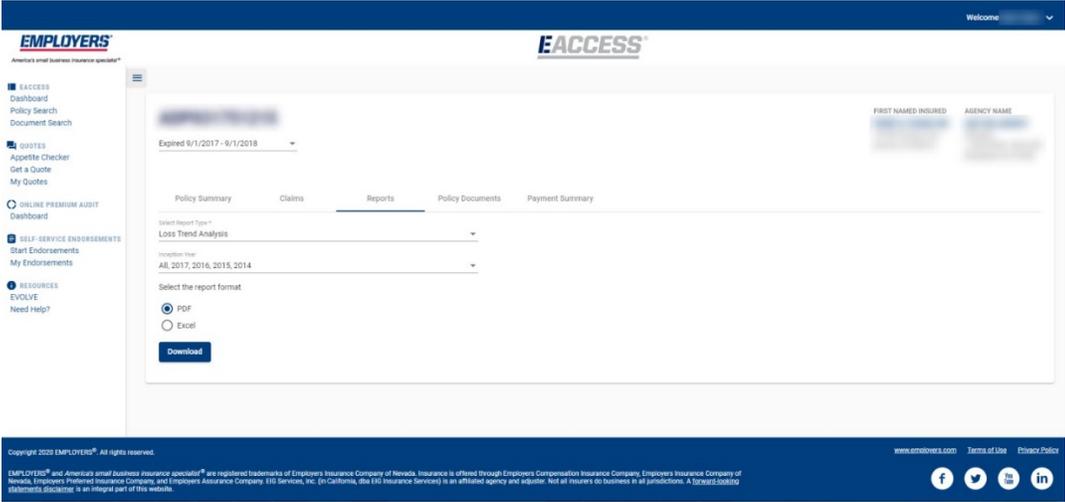
Download

Copyright 2020 EMPLOYERS®. All rights reserved. [www.employers.com](http://www.employers.com) [Terms of Use](#) [Privacy Policy](#)

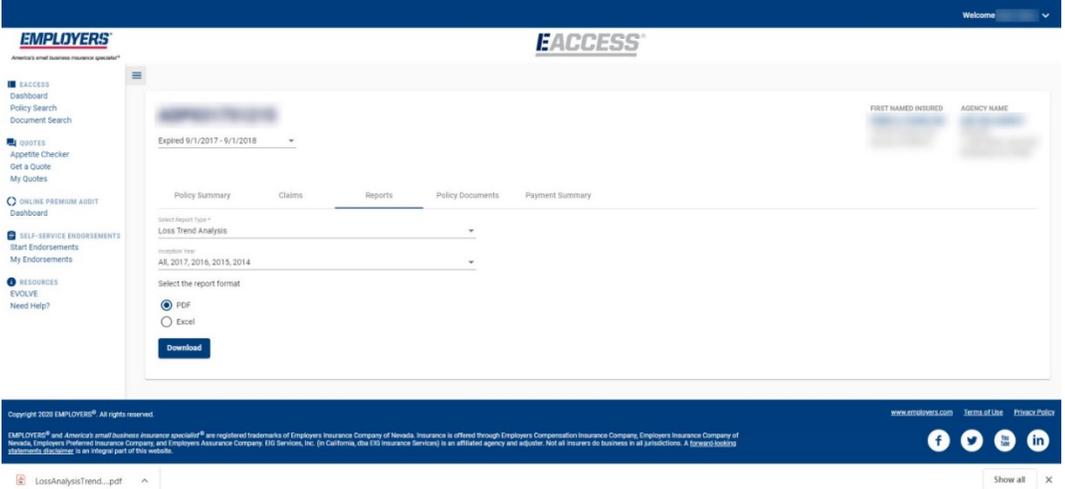
EMPLOYERS® and America's small business insurance specialist® are registered trademarks of Employers Insurance Company of Nevada. Insurance is offered through Employers Compensation Insurance Company, Employers Insurance Company of Nevada, Employers Preferred Insurance Company, and Employers Assurance Company. EIG Services, Inc. (in California, dba EIG Insurance Services) is an affiliated agency and adjuster. Not all insurers do business in all jurisdictions. A [forward looking statements disclaimer](#) is an integral part of this website.



For the Loss Trend Analysis, you are required to select an Inception Year. After download is selected a dialog box will appear. Click "Save."

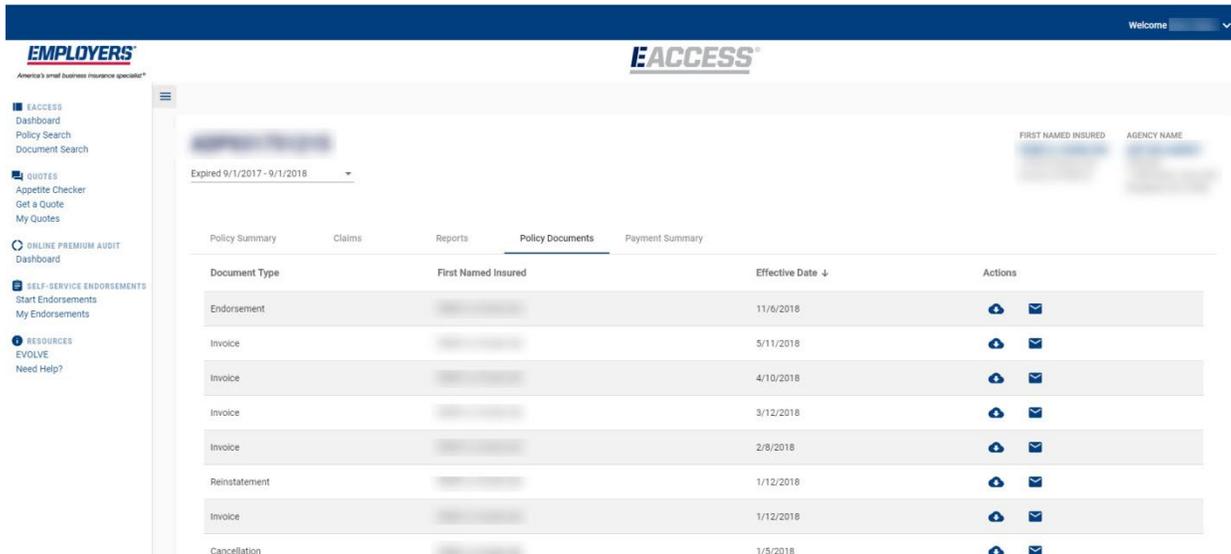


Then you will click on the Adobe or Excel download box which will appear in the lower left-hand corner to open the report.

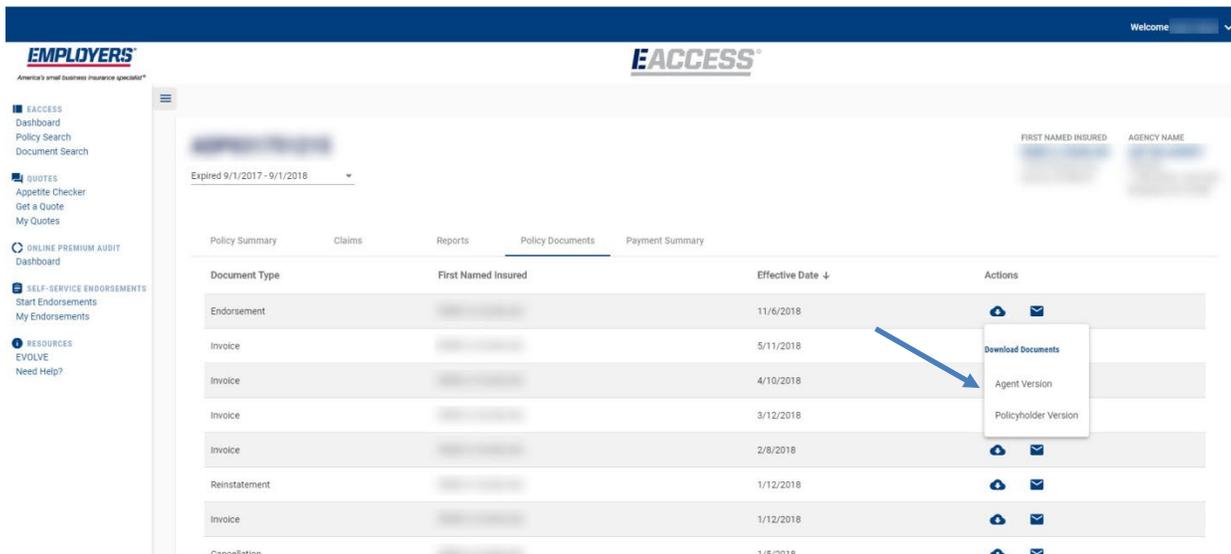


## Policy Documents

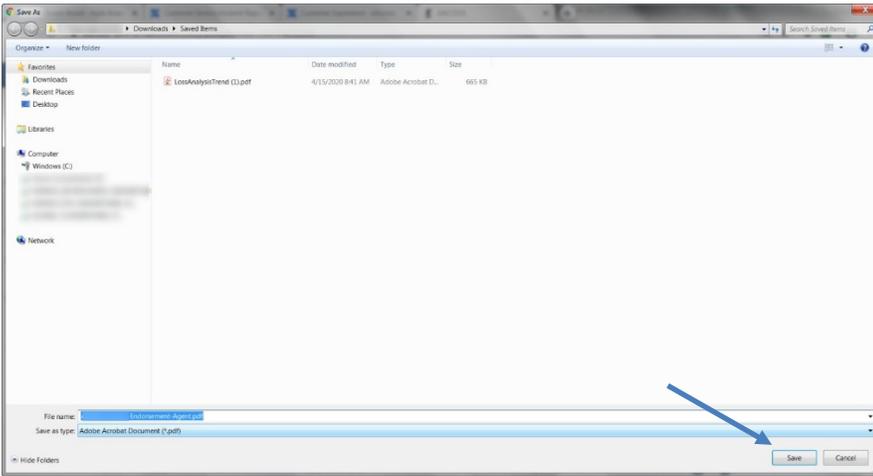
The Policy Documents tab provides you with access to policy related documents for the policy term selected from the dropdown. You can sort the information by any of the columns from "Document Type" to "Effective Date". Once the document is located, it can be downloaded to view, save or print.



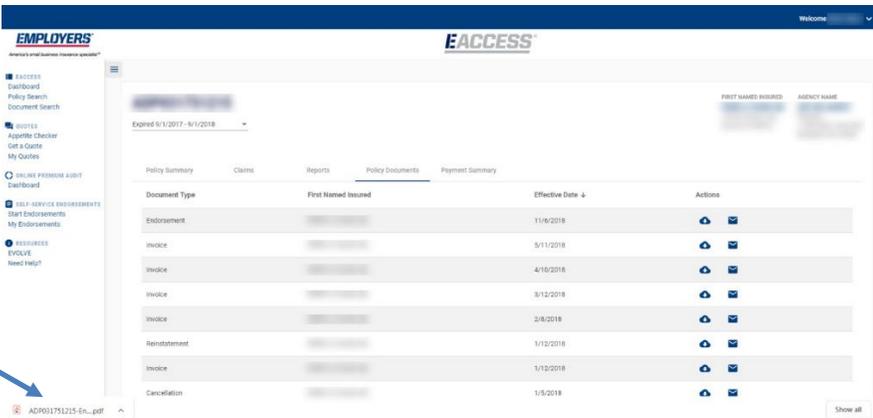
To download a document, you would click on the cloud icon and select the version.



After selecting the version, a dialog box will appear and select Save.

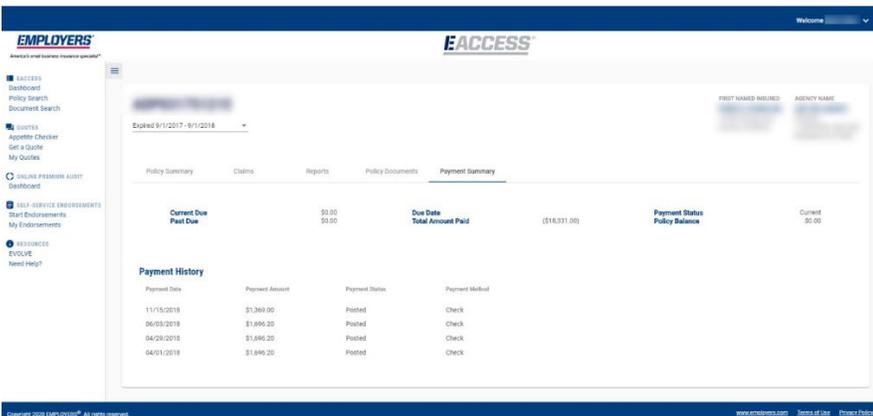


Next, you will click on the Adobe or Excel box which will appear in the lower left-hand corner to open the document.



## 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.

The screenshot shows the EACCESS Document Search interface. At the top, there is a search form with the following fields and options:

- Search by Policy Number, First Named Insured or Document Type
- Quick Search (selected)
- Search by Date
- Select Start Date
- Select End Date
- Search button

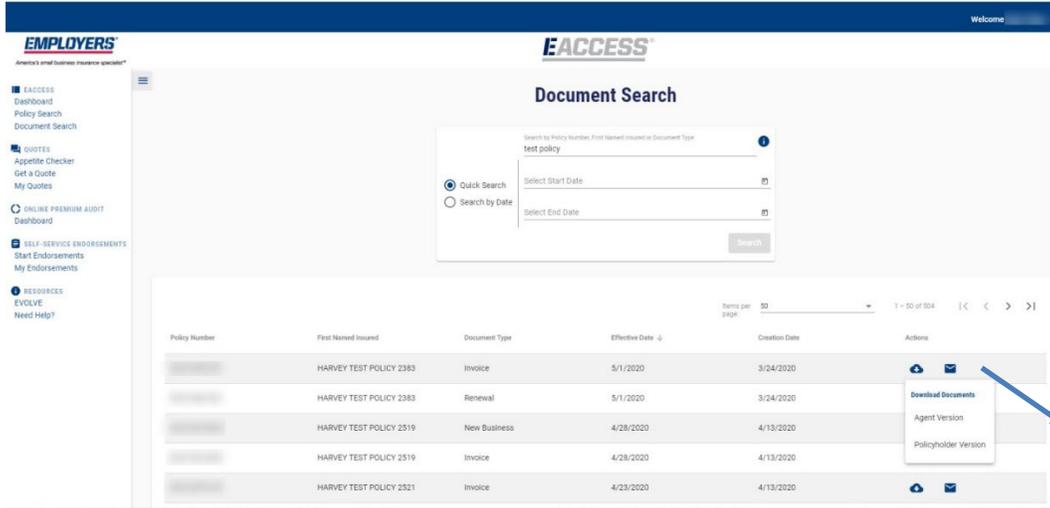
Below the search form, there is a tip: "Tip! The most recent Policy Documents have been preloaded by Effective Date." The search results are displayed in a table with the following columns:

| Policy Number | First Named Insured | Document Type | Effective Date ↓ | Creation Date | Actions            |
|---------------|---------------------|---------------|------------------|---------------|--------------------|
| [REDACTED]    | [REDACTED]          | Renewal       | 5/21/2020        | 4/13/2020     | [Download] [Print] |
| [REDACTED]    | [REDACTED]          | Renewal       | 5/20/2020        | 4/10/2020     | [Download] [Print] |
| [REDACTED]    | [REDACTED]          | Invoice       | 5/20/2020        | 4/10/2020     | [Download] [Print] |
| [REDACTED]    | [REDACTED]          | Renewal       | 5/15/2020        | 4/6/2020      | [Download] [Print] |

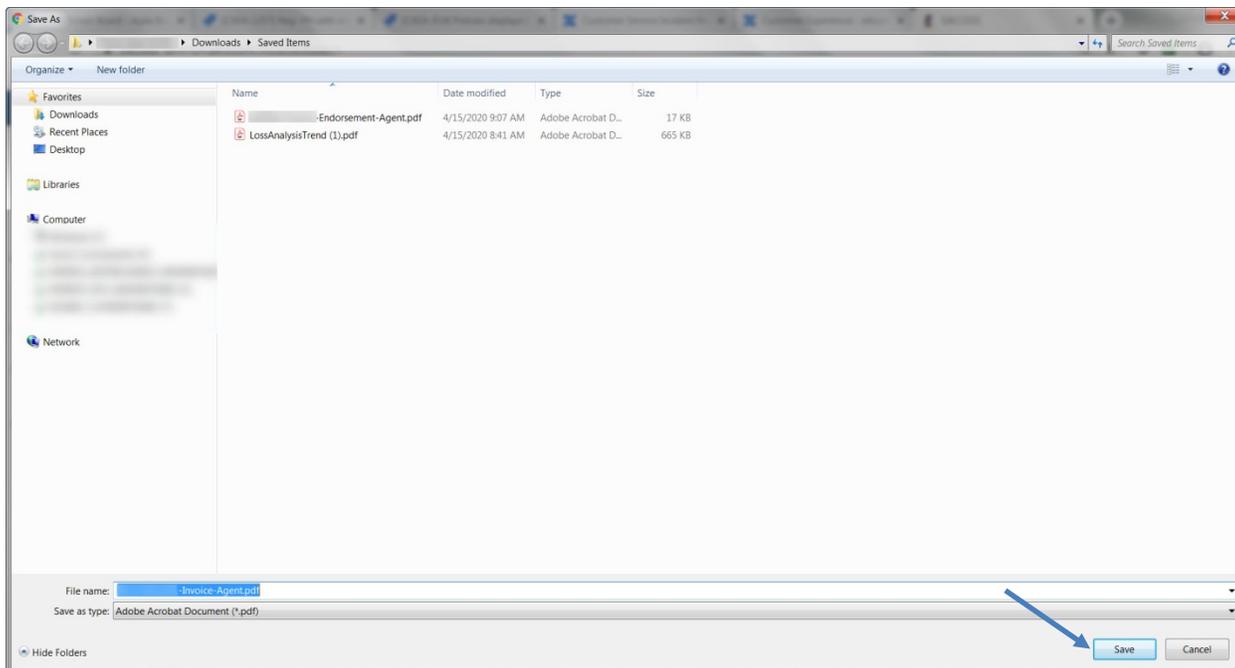
You can search for and download documents. You can sort the information by any of the columns from Policy Number to Effective Date. As in Policy Search, you can search by criteria to locate the document to download to view, save or print.

## Downloading a Document

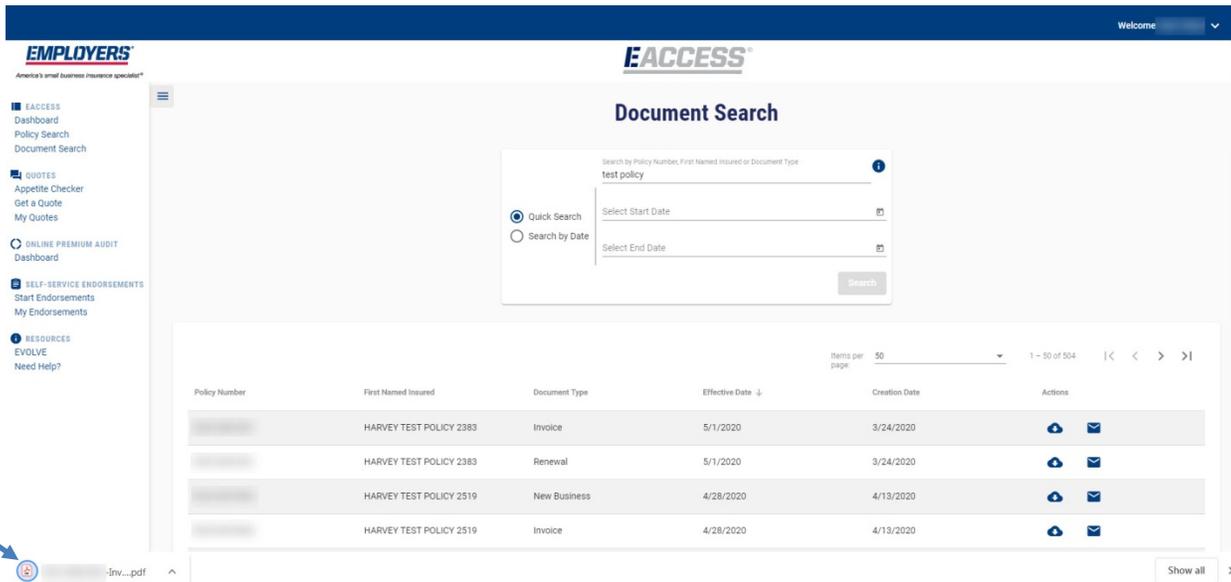
To download a document, click on the cloud icon and select the version.



After selecting the version, a dialog box will appear and select Save to download.



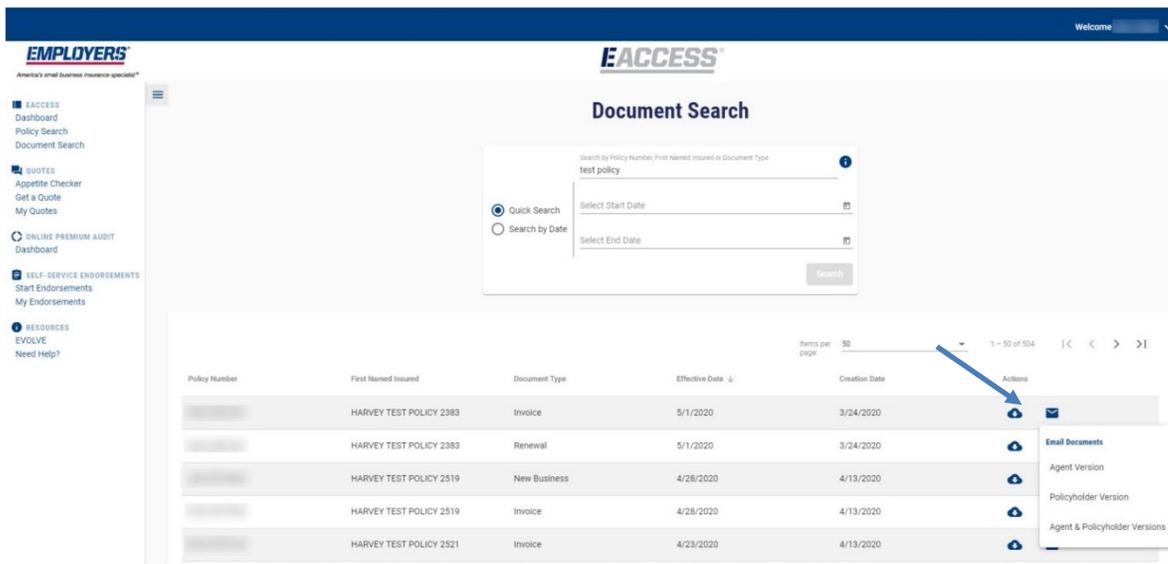
Next click on the Adobe or Excel download box which will appear in the lower left-hand corner to open the document.



Your selected document will open in the selected format.

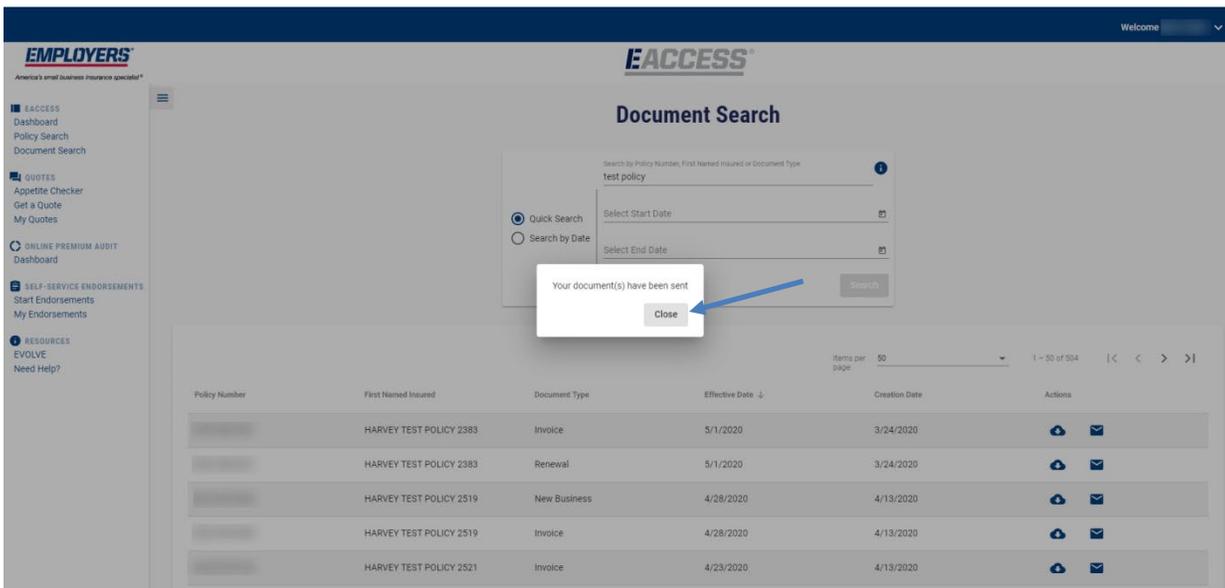
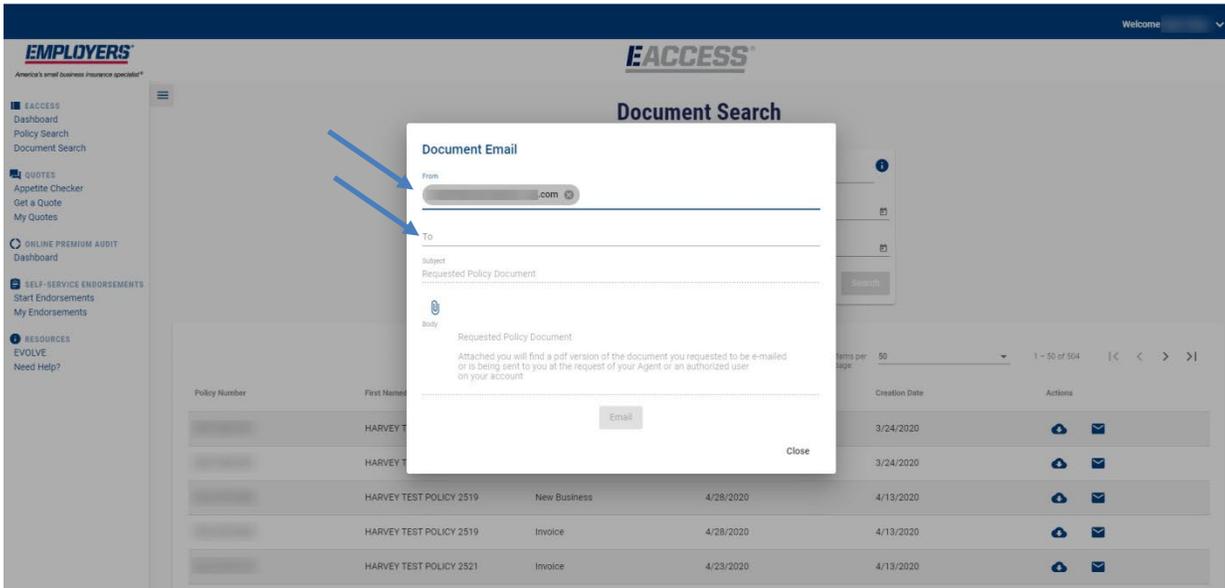
## E-Mailing a Document

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.

*Good faith efforts have been made to confirm the accuracy of the information in this document. However, no guarantee is offered that all features will be available to all users or that all information contained in this document is accurate. If you have any questions, please contact your Sales representative or our customer service advocates.*