Great American Agent Portal

Frequently Asked Questions

General Help

- How do I access the new portal?
- Where can I find training materials on how to use the portal?
- Who do I contact for assistance with the portal?

Troubleshooting

- If information is shown as "unavailable," what does that mean?
- What do I do if a page or section within the page is not loading?
- How can I search for information within the portal?

Dashboard

- Where can I see my notifications and alerts?
- Where can I find the billing information for a policy?

Billing

- How do I view an invoice?
- How do I make a payment?
- How do I find commission statements?

Policies

- How do I find policies that are delinquent or at risk of cancellation?
- How can I find policies that are expiring soon?
- How can I tell if a policy has been renewed?

Claims

- How do I view the status of a claim?
- How do I view claim payments?
- How do I submit a claim?

Documents

- How do I find my documents?
- How do I find my Notice of Cancellation documents?
- How do I select and share/download multiple documents?
- How can I tell if I have already viewed or downloaded a document?

Quotes

- How do I access my quoters?
- Where can I find contacts?
- Where do I find reports/Loss Runs?

General Help

How do I access the new portal?

You'll access the new portal via the same link and same login that you always have: https://agentportal.gaig.com

Where can I find training materials on how to use the portal?

In the portal, you can locate training materials using the following steps:

1. Click on **Resources** in the navigation menu on the left side of the screen.
2. On the Resources page, type **"quick card"** in the search bar and hit enter or the search button. This will display a list of all available portal training documents.

**Tip: In addition to training materials, the Resources page includes Applications and Forms, News and Announcements, Services, Products and How To Information.*

Who do I contact for assistance with the portal?

You can continue to contact Customer Care for assistance with the portal. This information can be found in the portal by hovering over the help icon in the top right corner of the page.

Phone: 800-543-1150

Email: customercare@gaig.com

Troubleshooting

If information is shown as "unavailable," what does that mean?

- If there is $0 due on a billing account, the due date will display as Unavailable.
  - Accounts that are pending cancellation for non-payment will display a $0 total due amount and Unavailable for the due date.
- If autopay is not set up for a direct bill account (Recurring credit card or Recurring ACH/EFT) the payment method will display as Unavailable.
- Billing status may display as Unavailable for older policies.
- Claimant will display as Unavailable if a claimant has not been identified yet.
- The closed date for a claim will display as Unavailable until the claim is closed.

What do I do if a page or section within the page is not loading?

Try refreshing the page by selecting the URL in your browser and hitting Enter on your keyboard or clicking the refresh icon in your browser.

How can I search for information within the portal?

You can search by **policy #** from the following pages:

- Dashboard
- Policies
- Claims
- Documents
- Search from the top of any page other than Dashboard by selecting the icon.

You can search by **insured name** from the following pages:

- Dashboard
- Policies
- Claims
- Documents
- Search from the top of any page other than Dashboard by selecting the icon.

You can search by **claim #** from the following pages:

- Dashboard
- Claims
- Search from the top of any page other than Dashboard by selecting the icon.

You can search by **account #**, **master producer code** or **account name** on the Billing page.

Dashboard

Where can I see my notifications and alerts?

To view notifications or alerts, click on the icon in the top right-hand corner of the page (from any page within the portal).

**Tip: If you have a new notification or alert, the bell icon will turn red.*

**Tip: Alerts will display if they are active. Notifications will be available for 14 days.*

**Tip: For information about creating a new notification or subscription, please refer to the Notifications & Subscriptions quick card.*

Where can I find the billing information for a policy?

View policy level billing information by using the following steps:

1. Click on Policies in the navigation menu on the left side of the screen.
2. Locate the policy you would like to view billing information for by searching or filtering the list.
3. Click on the link in the Policy # column to navigate to the Policy Details page.
4. Billing information will be displayed in the Policy Billing Section.
5. If you would like to view additional billing information or make a payment for the account that policy is tied to, click on the View Billing Details button to be directed to the billing account details page.

You can also view policy billing information by navigating to the Billing section in the menu on the left side of the screen, selecting a billing account, and viewing the policies section on the Billing Details page.

Billing

How do I view an invoice?

View and download invoices from the Billing page for any account using one of the following options:

1. In the account list, locate the account you would like to view the invoice for and click on the icon in the Action column to the far right. Then select the View Invoice option in the menu.

-OR-

2. In the account list, locate the account you would like to view the invoice for and click on the link in the Billing Acct # column. On the Billing Details page, click the View Invoice button in the Account Billing section.

You can also view and download invoices from the Policy Details page using the following steps:

1. Click on Policies in the navigation menu on the left side of the screen.
2. Locate the policy you would like to view an invoice for by searching or filtering the list.
3. Click on the link in the Policy # column to go to the Policy Details page.
4. Click on View Invoice button in the Policy Billing Section.

**Tip: Please refer to the View Invoice quick card for screenshots and additional details on these steps.*

**Tip: If you have permission to view Agency Bill statements, you can find these statements using similar steps as above but selecting an Agency Bill account and clicking View Statement. Please refer to the View Statements quick card for additional details about these steps.*

How do I make a payment?

You can make a payment on the Billing page for any account using one of the following options:

1. Click the Make a Payment button in the top right corner of the page and select the type of payment you wish to make. Enter the policy information for a down payment or select the account the payment is for in the drop-down list.

-OR-

2. In the account list, locate the account you would like to make a payment for, click on the icon in the Action column to the far right, and select the Make a Payment option.

You can also make a payment from within the Billing Details page of an account by clicking on the Make a Payment button in the Account Billing section.

**Tip: You are not able to apply a payment to a specific policy on the account unless it is a downpayment for a new policy.*

**Tip: If you do not know the account # you want to make a payment for, you can search for the policy, click the policy # link to go to the Policy Details then select the View Billing Details button. A payment can be made for the account on the Billing Details page.*

**Tip: Please refer to the Making a Payment quick cards for screenshots and additional details on these steps.*

How do I find commission statements?

If you have permission to view commission statements in the portal, you can locate them using the following steps:

1. Click on Commissions in the navigation menu on the left side of the screen.
2. Locate the commission statement you would like to view and select to preview or download.
3. To view Agency Bill statements, click on the Agency Bill Statements tab and locate the statement you would like to view.

**Tip: Agency Bill Statements are also available in the Policy Billing section of Policy Details and on the Billing Details page to users who have permission.*

Policies

How do I find policies that are delinquent or at risk of cancellation?

You can easily see which policies are delinquent or at risk of cancellation by using the following steps:

1. Click on Policies in the navigation menu on the left side of the screen.
2. Click on the Filters button in the top right corner of the page.
3. Scroll down to the Billing Status section and select the appropriate status (delinquent, pending cancellation, etc.), then click the Apply button.
4. To see additional information about the policy and why it is delinquent or at risk, click the link in the Policy # column to view the policy details.

**Tip: If you need the billing documents associated to the account, you will need to navigate to the Documents page and search for that policy.*

**Tip: You can find delinquent accounts by applying a filter for the Delinquent billing status on the Billing page.*

How can I find policies that are expiring soon?

You can quickly view policies that are expiring soon by using the following steps:

1. Click on Policies in the navigation menu on the left side of the screen.
2. The Policies page displays policies that cancel or expire within the next 14 days at the top of the list.
3. If a policy is expiring or cancelling within the next 90 days, there will be an indicator (in red font) below the coverage dates in the Policy Coverage column.

**Tip: If you would like to see a specific date range of when policies are expiring, click on the Filters button, then adjust the Policy Coverage dates to reflect the date range you want to view.*

How can I tell if a policy has been renewed?

Find policy renewals easily on the Policies list by following these steps:

1. Select Policies in the left navigation menu.
2. Select the Filters button toward the top right corner of the page.
3. In the Filters menu, select the Future checkbox in the Policy Status section. Then select Apply.
4. All future dated policies will display in the Policies list.

To check if a specific policy has renewed and to view the renewal documents, follow these steps:

1. Search for a policy (Dashboard or Policies page).
2. Select the link in the Policy # column to navigate to the Policy Details page.
3. Select the Policy Documents tab. Any renewal documentation for the policy will be available here.

Claims

How do I view the status of a claim?

You can view the status of a claim by using the follow steps:

1. Click on Claims in the navigation menu on the left side of the screen.
2. Locate the claim you would like to see the status of by searching or filtering the list.
3. The claims status will be displayed as a tag in the Report Date column of the list view.
4. If you have permission to view claim details, you can also click on the link in the Claim # column to navigate to the Claim Details page where the status is displayed in the Claim Info section.

You can also see the status of a claim through the Policies page by navigating to the Policy Details page and clicking on the Policy Claims tab.

How do I view claim payments?

Depending on your access, you may have permission to view payment details for a claim using the following steps:

1. Click on Claims in the navigation menu on the left side of the screen.
2. Locate the claim you would like to see payment information for by searching or filtering the list.
3. Click the link in the Claim # column to go to the Claims Details page.
4. Click on the Claim Payments tab to view the payment details for that claim.

**Tip: Please refer to the View Claim Payments quick card for screenshots and additional details on these steps.*

How do I submit a claim?

Depending on your access, claims can generally be submitted to Great American by following the steps below:

1. Select Policies in the navigation menu on the left side of the screen.
2. Select the link in the Policy # column for the policy you wish to submit a claim for.
3. Select the Policy Claims tab at the top of the page.
4. Select the Start a Claim button toward the top right corner of the page then follow the instructions displayed.

Claims can also be submitted on the Claims home page.

Documents

How do I find my documents?

You can find documents related to policy coverage on the following pages:

- The 5 most recent policy documents are listed on the Dashboard page in the Recent Policy Documents section.
- All policy-related documents are listed on the Policy Documents tab of the Policy Details page. Billing documents (Past Due Invoice, Notice of Cancellation, etc.) are not available on the Policy Documents page.
- The Documents page includes all policy documents for all policies. You can search this list by insured name or policy # to easily find a specific document.

**Tip: Review the View Policy Documents in Policy Details quick card for more information.*

You can find documents related to billing for a policy or account on the following pages:

- All documents for a billing account or master producer code are listed on the Billing Documents tab of the Billing Details page. Policy level billing documents are also available on the Billing Documents tab.
- The Documents page includes all billing documents for all policies and accounts or master producer codes. You can search this list by insured name or policy # to easily find a specific document.

**Tip: Review the View Billing Documents in Billing Details quick card for more information.*

How do I find my Notice of Cancellation documents?

Notice of Cancellation documents for a direct bill account can be found on the Documents page. Notice of Cancellation documents for an agency bill can be found on the Documents page or on the Billing Documents tab of Billing Details.

How do I select and share/download multiple documents?

From the main Documents page, you can select multiple documents and download or share (email) them using the following steps:

1. On the documents page, select the documents you would like to download or share by clicking on the check boxes in the far-left column of the list.
2. Once you have selected the documents, you can download them all into a zip file or share them via email by clicking on the Download or Share buttons in the top right corner of the page.

How can I tell if I have already viewed or downloaded a document?

You can determine if you have already viewed or downloaded a document using the following two indicators:

1. The preview and download links will turn purple once they have been selected. Note that they will only stay purple during the current session.
2. The Last Viewed column will populate the date that the document was previewed or downloaded. Note that you must refresh the page for the information to populate.

Quotes

How do I access my quoters?

You can access quoters by using one of the following two options:

1. Click the Start a Quote button in the top right corner of the page to be directed to any quoters you have access to.

-OR-

2. On the Dashboard page, scroll down to the Quote, Bind, Issue section at the bottom of the page to view any quoters you have access to.

Where can I find contacts?

- You can view a general list of Great American contacts by selecting Contacts in the navigation menu on the left side of the screen.
- For questions about a specific policy, you can find a list of contacts on the Policy Summary tab of the Policy Details page.
- To find contacts who can help answer billing questions, select the Billing Contacts button on the Billing page or on the Billing Details page.

**Tip: Quick cards are available on the Resources page in the portal with more details on locating these contacts.*

Where do I find reports/Loss Runs?

Various reports are available on the **Analytics & Reports** page which is available in the navigation menu on the left side of the screen.

Loss Run reports can be found in the following places:

1. On the Policies home page, locate the policy you wish to pull the loss run for, then select the icon in the Actions column for that policy. Select the View Loss Run option in the action menu.
2. On the Policy Details page, select the View Loss Run button toward the top right corner of the page.
3. On the Billing Summary page within the Billing Details for a direct bill or agency bill view the Policies section. If you have permission to view all details for the policy, then the Action menu will include an option to View Loss Run.