

TUTORIAL: Bind, Pay By Check | Issue Policy

Table of contents

STANDARD OPERATING PROCEDURE (SOP) DETAILS	3
System Requirements	4
Overview	5
PART I—BIND, PAY, ISSUE POLICY	6
1. Bind, Pay, Issue Policy Select Payment Frequency	7
2. Bind, Pay, Issue Policy EFT Payment Entry	8
3. Bind, Pay, Issue Policy Click To Pay	9
4. Bind, Pay, Issue Policy Payment Confirmation	10
5. Bind, Pay, Issue Policy Coverage Confirmation	11
Revision History	12

BIND, PAY BY CHECK | ISSUE POLICY TUTORIAL



SOP#: _____ Revision/Version: 1.0
Effective Date: 2013

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Approved By: CEO Daniel O'Neal

Title: TUTORIAL: Bind, Pay By Check | Issue Policy

Policy: This tutorial serves as a standard operating procedure for binding coverage, paying by check and issuing a policy online.

Purpose: To provide insurance agents and applicants with step-by-step instructions so that they can bind coverage, pay by check and issue a policy online.

Scope: This tutorial covers binding coverage, paying by check and issuing a policy online.

Responsibilities: Insurance agents and applicants are responsible for the tasks contained in this tutorial.

Definitions:

Overview: This tutorial was created in 2013 to help insurance agents and applicants bind coverage, pay by check and issue policies online.

System Requirements

System Requirements

This tutorial assumes that the user:

1. Has access to the internet

Browsers and Operating Systems:

OnLine-PL is optimized to work on all of the following, prominent browsers:

- Internet Explorer 6 or greater
- Mozilla Firefox 15
- Google Chrome 22.1
- Safari 4

The Allied Health Application works best on all of the following operating systems:

- Windows XP or greater
- Mac OS X, 10.5 or greater

Overview

Overview

This document was developed to help insurance agents and applicants bind policies, handle check payments and issue policies online.

This document contains one main section:

- [I. Bind, Pay By Check, Issue Policy](#)

RELATED TUTORIALS:

- TUTORIAL: Generate Travel Agency E&O Indication In OnLine-PL
- TUTORIAL: Generate Travel Agency E&O Indication Online
- TUTORIAL: Process Travel Agency E&O Application Details In OnLine-PL
- TUTORIAL: Process Travel Agency E&O Application Details Online
- TUTORIAL: Bind, Pay By Credit Card | Issue Policy
- TUTORIAL: Confirmation and Policy Document Emails

PART I—BIND, PAY, ISSUE POLICY

PART I--BIND, PAY BY CHECK | ISSUE POLICY

This section illustrates how to bind coverage, issue and pay for a policy online by check.

1. Bind, Pay, Issue Policy | Select Payment Frequency

Bind, Pay, Issue Policy | Select Payment Frequency

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Please select your payment plan

<input checked="" type="checkbox"/> Pay in Full	Professional Liability Premium	600.00
	Additional Coverage Premium	0.00
	Policy Fee	25.00
	Florida FIGA Tax	40.63
	Total	665.63

Quarterly

	**Downpayment of 35%	\$277.63
	*3 quarterly payments	\$132.00
	Total payments plus \$8 installment fees	\$673.63

Monthly

	*Downpayment of 20%	\$187.63
	*8 monthly payments	\$62.00
	Total payments plus \$18 installment fees	\$683.63

* Includes \$2 installment fee per payment.
** Includes taxes if applicable.

SELECT PAYMENT FREQUENCY

Select method of payment

12760

Previous **Next**

QUIT | 175 Berkeley Street Boston, MA 02117

1. Click to select the applicant's desired payment frequency.
2. Click on the **Next** button. The Bind, Pay, Issue Policy | EFT Payment Entry page displays.

2. Bind, Pay, Issue Policy | EFT Payment Entry

Bind, Pay, Issue Policy | EFT Payment Entry

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Travel Agency E & O - Surplus Lines Payment

Total payable - \$665.63

Please enter your ABA/routing & account number.

ABA/Routing #: 267084131

Account #: 99999999

If I am accepted by the Company and agree to the underwriting terms, I authorize the Company or its representative to initiate, and my financial institution to honor payments from the above bank account.

EXAMPLE

Your Name 00-01 1051
1234 Your Street
Your Town, NY 12345 00-0000 00
100

Pay to the Order of \$

YOUR BANK

For
⑆ 123456789 ⑆ 123456789 ⑆ 123 ⑆ 1051

Routing # Account # Check #

Electronic Fund Transfer Payment Entry

Select method of payment

Previous Next

QUIT 175 Berkeley Street Boston, MA 02117

1. Type the applicant's ABA/routing number into the designated field.
2. Type the applicant's account number into the designated field.
3. Click on the **Next** button. The Bind, Pay, Issue Policy | Click To Pay page displays.

3. Bind, Pay, Issue Policy | Click To Pay

Bind, Pay, Issue Policy | Click To Pay

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

You have selected to pay by Checking

Policy Payment

Routing number - 267084131
Bank account number - *****9999
Amount to be paid \$665.63

All the billing reminders & documents will be sent to the e-mail address listed below.

If you want your policy documents to go to another e-mail address click in the box & enter it below.
travel@gmail.com

Soon, you will receive all your policy documents via e-mail from Policy Services -
It is possible your e-mail might see this as spam. Please check your spam box and allow mail from this e-mail address.

Electronic Fund Transfer Payment Entry

Once you click the "Pay" button your transactions will be processed.
Only click the "Pay" button once.

Previous Pay

QUIT 175 Berkeley Street Boston, MA 02117

1. Click on the **Pay** button. The Bind, Pay, Issue Policy | Payment Confirmation page displays.

4. Bind, Pay, Issue Policy | Payment Confirmation

Bind, Pay, Issue Policy | Payment Confirmation

The screenshot shows a payment confirmation page for 'your company name'. The page header includes the company logo and contact information: 'Company Name, 123 Main Street, Anytown, USA 12345, Phone: 445.555-1212'. A banner for 'Travel Agency E&O Insurance' is visible on the right. The main content area is divided into two columns. The left column, titled 'You have selected to pay by Checking', contains a 'Policy Payment' box with the following details: 'Routing number - 267084131', 'Bank account number - *****9999', and 'Amount to be paid \$665.63'. Below this is a red message: 'YOUR PAYMENT WILL BE PROCESSED ON 1/24/2014'. A second box, 'Travel Agency E & O - Surplus Lines Payment', shows 'Total payable - \$665.63'. At the bottom of the left column, it says 'Transaction Number 512226 @ 1/24/2014 12:22:17 PM'. The right column, titled 'Electronic Fund Transfer Payment Entry', has a yellow header and a grey box with the text: 'PRINT THIS PAGE FOR YOUR RECEIPT. YOUR TRANSACTION NUMBER IS: 512226. YOUR POLICY DOCUMENTS WILL BE SENT TO YOU SHORTLY.' A 'Next' button with a right arrow is circled in red at the bottom right of the right column. The footer contains a 'QUIT' button, the address '175 Berkeley Street Boston, MA 02117', and a small icon.

1. Use the browser's print option to print this page as a receipt.
2. Click on the **Next** button. The Bind, Pay, Issue Policy | Coverage Confirmation page displays.

5. Bind, Pay, Issue Policy | Coverage Confirmation

Bind, Pay, Issue Policy | Coverage Confirmation



**LIBERTY SURPLUS INSURANCE CORPORATION
CONFIRMATION OF COVERAGE
TRAVEL AGENCY E & O - SURPLUS LINES**

INSURED: John Doe
Doing Business As Name
361 E. Hillsboro Blvd.
Deerfield Beach, FL 33441

STATUS: Active

CONFIRMATION NUMBER: 512668

CONFIRMATION DATE: 3/1/2014

EXPIRATION DATE: 3/1/2015

LIMITS: \$1,000,000/\$1,000,000

CLASSIFICATION: Retail Travel Agent

CONFIRMATION PROVIDED FOR:

THIS CONFIRMATION OF COVERAGE IS PROVIDED ON BEHALF OF THE NAMED INSURED AND IS FOR INFORMATION PURPOSES ONLY AND EXTENDS NO RIGHTS TO ANYONE OTHER THAN THE NAMED INSURED. SHOULD THIS POLICY BE CANCELLED THE COMPANY WILL MAIL THE CERTIFICATE HOLDER A NOTICE OF CANCELLATION WITHIN 30 DAYS; HOWEVER, FAILURE TO ISSUE SUCH NOTICE TO ANY LISTED ENTITY SHALL NOT OBLIGATE THE COMPANY TO ANY LIABILITY.

Program Administrator
Managed Insurance Services, LLC
361 E. Hillsboro Blvd.
Deerfield Beach, FL 33441

Phone 954-788-5463 www.managedinsurance.com Fax 954-428-1175

[<<Log Out>>](#)

[Return](#)

To print this screen please use the File - Print option at the upper left corner of your screen.

1. Use the browser's print option to print the coverage confirmation.
2. Click on the **<<Log Out>>** link in the top right corner of the screen to exit.

This concludes the Bind, Pay, Issue Policy portion of this tutorial.

Revision History

Revision History

Revision:	Date:	Requested By:	Description of Changes:	Signature