TUTORIAL: Bind/Pay By Check / Issue Policy

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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:

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

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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:

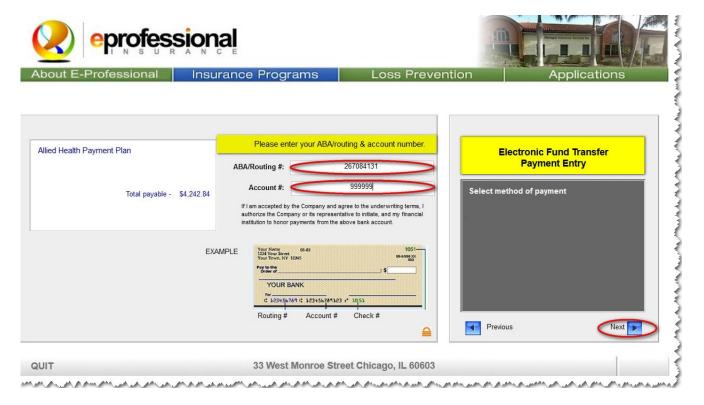- **I. Bind/Pay By Check / Issue Policy**

PART I—BIND/PAY BY CHECK / 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.
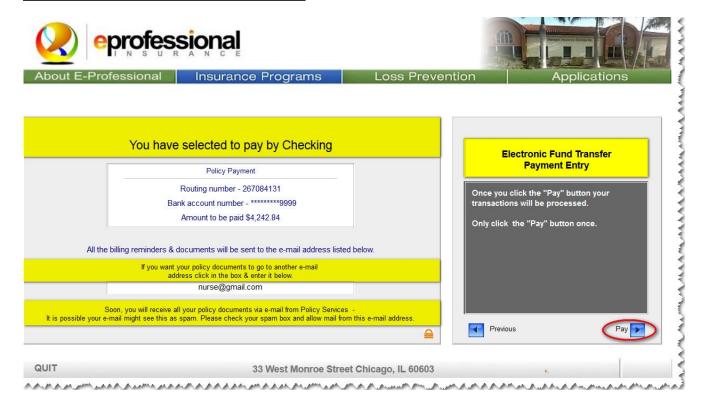
1. Bind/Pay By Check / Issue Policy | EFT Payment Entry

Bind/Pay By Check / Issue Policy | EFT Payment Entry

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 and Pay | Issue Policy | Click To Pay page displays.

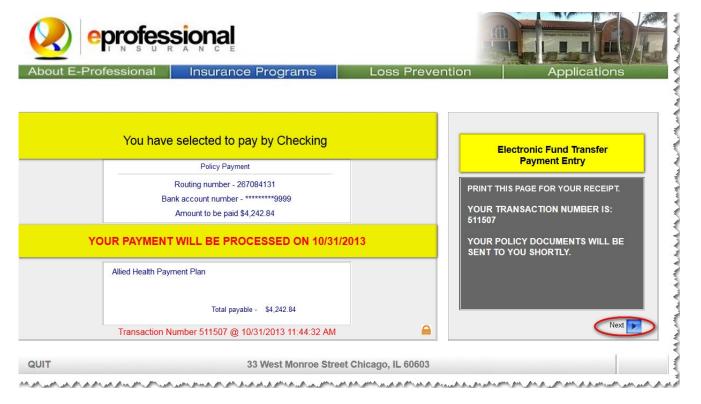## 2. Bind/Pay By Check / Issue Policy | Click To Pay

Bind/Pay By Check / Issue Policy | Click To Pay

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

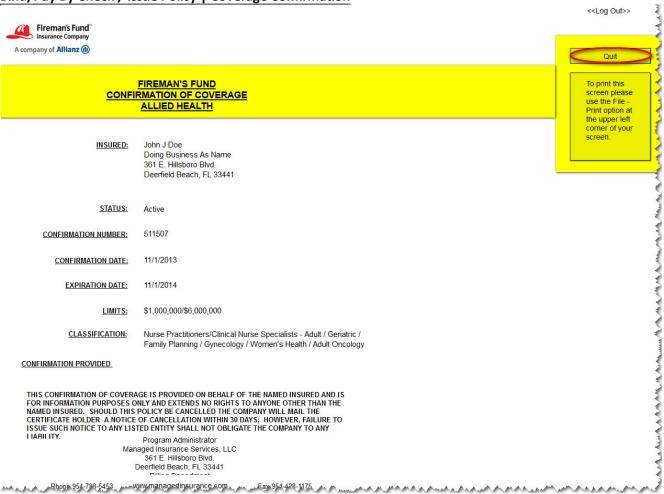# 3. Bind/Pay By Check / Issue Policy | Payment Confirmation

Bind/Pay By Check / Issue Policy | Payment Confirmation

1. Click to select **File / Print** from the browser menu to print this page as a receipt.

2. Click on the **Next** button. The Bind and Pay | Issue Policy | Coverage Confirmation page displays.

4. Bind/Pay By Check / Issue Policy | Coverage Confirmation

Bind/Pay By Check / Issue Policy | Coverage Confirmation

1. Click to select **File / Print** from the browser menu to print the confirmation of coverage.

2. Click on the **Quit** button in the top right corner of the screen to exit.

This concludes the Bind/Pay By Check / Issue Policy portion of this tutorial.

Revision History

Revision History

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