

# 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

**Prepared By:** Technical Writer Judy Thomas

**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

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## **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

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### **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**

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### **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

The screenshot displays the E-Professional Insurance website interface. At the top, there is a navigation bar with the following links: "About E-Professional", "Insurance Programs", "Loss Prevention", and "Applications". The main content area is divided into two panels. The left panel, titled "Allied Health Payment Plan", shows a "Total payable - \$4,242.84". The right panel, titled "Electronic Fund Transfer Payment Entry", contains a form for entering ABA/routing and account numbers. The form has two input fields: "ABA/Routing #:" with the value "267084131" and "Account #:" with the value "9999999". Both fields are circled in red. Below these fields is a disclaimer: "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." An "EXAMPLE" section shows a check from "YOUR BANK" with the routing number "123456789" and account number "123456789". At the bottom of the form, there are "Previous" and "Next" buttons. The "Next" button is circled in red. The footer of the page includes a "QUIT" button and the address "33 West Monroe Street Chicago, IL 60603".

Ally Health Payment Plan

Total payable - \$4,242.84

Please enter your ABA/routing & account number.

ABA/Routing #: 267084131

Account #: 9999999

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 08-01 1051-  
1234 Your Street  
Your Town, NY 12345 99-6-999 XXX  
200

Pay to the  
Order of \$

YOUR BANK

For  
123456789 123456789 123 4 56789

Routing # Account # Check #

Electronic Fund Transfer  
Payment Entry

Select method of payment

Previous Next

QUIT 33 West Monroe Street Chicago, IL 60603

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

**You have selected to pay by Checking**

Policy Payment

Routing number - 267084131  
Bank account number - \*\*\*\*\*9999  
Amount to be paid \$4,242.84

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.

nurse@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

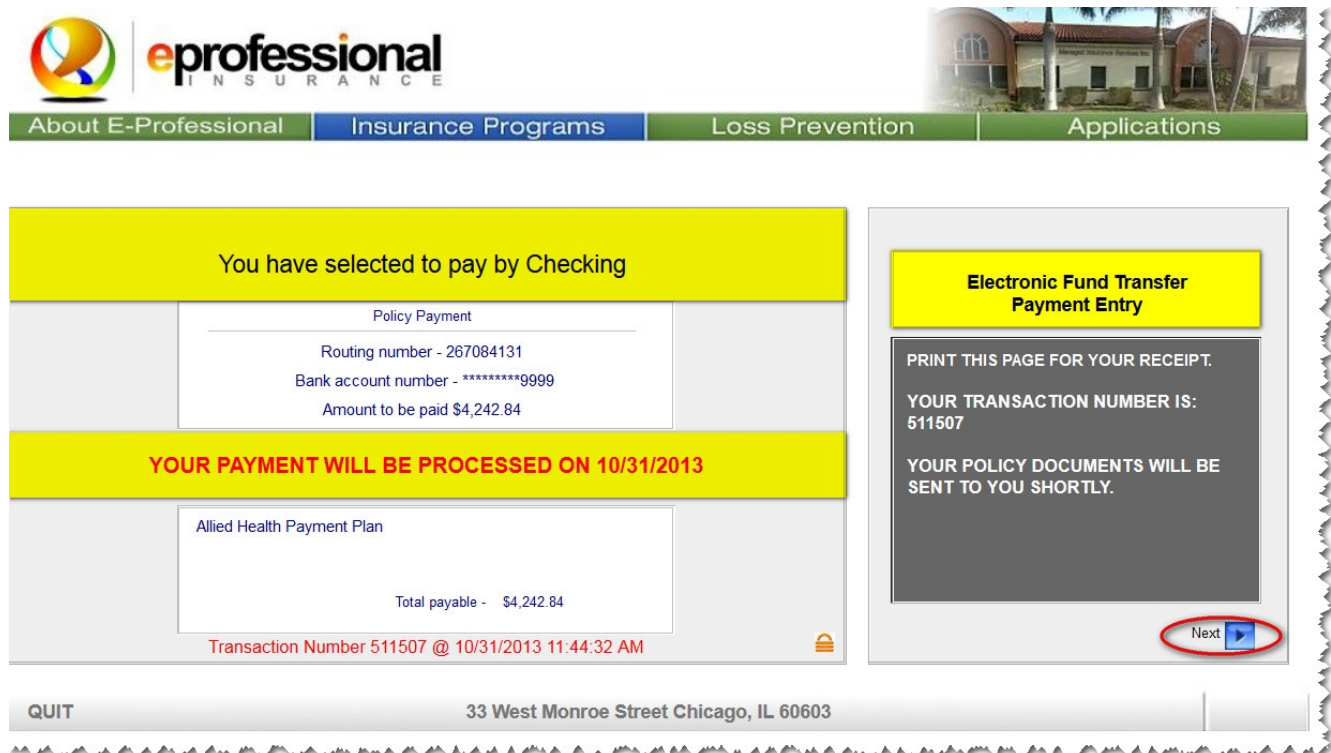
QUIT 33 West Monroe Street Chicago, IL 60603

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



The screenshot displays the E-Professional Insurance website's payment confirmation interface. At the top, the logo for E-Professional Insurance is visible, along with navigation links: "About E-Professional", "Insurance Programs", "Loss Prevention", and "Applications". A small image of a building is also present in the top right corner.

The main content area is divided into two columns. The left column has a yellow header that reads "You have selected to pay by Checking". Below this, a white box contains the following information:

- Policy Payment
- Routing number - 267084131
- Bank account number - \*\*\*\*\*9999
- Amount to be paid \$4,242.84

Below this box, a yellow banner states: "YOUR PAYMENT WILL BE PROCESSED ON 10/31/2013". Underneath, another white box shows:

- Allied Health Payment Plan
- Total payable - \$4,242.84

At the bottom of the left column, a red line of text reads: "Transaction Number 511507 @ 10/31/2013 11:44:32 AM". A small shopping cart icon is located to the right of this text.

The right column features a yellow header that reads "Electronic Fund Transfer Payment Entry". Below this, a grey box contains the following text:

- PRINT THIS PAGE FOR YOUR RECEIPT.
- YOUR TRANSACTION NUMBER IS: 511507
- YOUR POLICY DOCUMENTS WILL BE SENT TO YOU SHORTLY.

At the bottom of the right column, a "Next" button with a blue arrow icon is circled in red.

The footer of the page includes a "QUIT" link on the left and the address "33 West Monroe Street Chicago, IL 60603" in the center.

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

<<Log Out>>



#### **FIREMAN'S FUND CONFIRMATION OF COVERAGE ALLIED HEALTH**

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

**STATUS:** Active

**CONFIRMATION NUMBER:** 511507

**CONFIRMATION DATE:** 11/1/2013

**EXPIRATION DATE:** 11/1/2014

**LIMITS:** \$1,000,000/\$6,000,000

**CLASSIFICATION:** Nurse Practitioners/Clinical Nurse Specialists - Adult / Geriatric /  
Family Planning / Gynecology / Women's Health / Adult Oncology

#### **CONFIRMATION PROVIDED**

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 954-798-5453 www.managedinsurance.com Fax 954-428-1175

Quit

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

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

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**Revision History**

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