

# TUTORIAL: Bind, Pay By Credit Card | Issue Policy

## Table of contents

---

STANDARD OPERATING PROCEDURE (SOP) DETAILS .....	3
System Requirements .....	4
Overview .....	5
PART I-BIND, PAY BY CREDIT CARD, ISSUE POLICY .....	6
1. Bind, Pay, Issue Policy   Payment Frequency .....	7
2. Bind, Pay, Issue Policy   Credit Card Payment .....	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 CREDIT CARD | 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 Credit Card | Issue Policy

**Policy:** This tutorial serves as a standard operating procedure for binding coverage, paying by credit card 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 credit card 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 credit card 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 assist insurance agents and applicants in binding coverage, paying by credit card and issuing policies online.

This document contains one main section:

- [I. Bind, Pay By Credit Card, 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 Check | Issue Policy
- TUTORIAL: Confirmation and Policy Document Emails

## **PART I—BIND, PAY BY CREDIT CARD, ISSUE POLICY**


---

### **BIND, PAY BY CREDIT CARD, ISSUE POLICY**


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

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

### Bind, Pay, Issue Policy | Payment Frequency



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

Travel Agency E&O Insurance

Please select your payment plan

Professional Liability Premium	600.00
Additional Coverage Premium	0.00
Policy Fee	25.00
Florida FIGA Tax	40.63
Total	665.63

☒ Pay in Full

Credit card fees - \$15.98  
Total \$681.61

Payments made by credit card are not available for payment plans.

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

SELECT PAYMENT FREQUENCY

Select method of payment

12791

Previous

Next

QUIT

175 Berkeley Street Boston, MA 02117

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

## 2. Bind, Pay, Issue Policy | Credit Card Payment

### Bind, Pay, Issue Policy | Credit Card Payment

**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 - \$681.61  
includes a \$15.97 credit card fee.

We accept Visa or Mastercard

Credit Card #: 5207180124593294

Expiration Date: Month: 12 Year: 2016

3 digit security code as it appears on the back of your card: 200

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

**Credit Card Payment Entry**

Select method of payment

Previous Next


QUIT 175 Berkeley Street Boston, MA 02117

1. Type the applicant's credit card number into the designated field.
2. Click to select the applicant's expiration date month and year from the designated dropdown menus.
3. Type the applicant's three-digit security code into the designated field.
4. 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



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

Travel Agency E&O Insurance

You have selected to pay by Credit Card

Policy Payment

Credit card number - \*\*\*\* \* 3294  
Expiration date of credit card 12/2016  
Amount to be paid \$681.61

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:

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 interface for 'your company name'. The header includes the company logo, name, address (123 Main Street, Anytown, USA 12345), phone number (445.555-1212), and a banner for 'Travel Agency E&O Insurance' with an image of a couple on a beach. The main content area is divided into two panels. The left panel, titled 'You have selected to pay by Credit Card', contains a 'Policy Payment' box with fields for credit card number (\*\*\*\* \* 3294), expiration date (12/2016), and amount (\$681.61). Below this, a red message states 'YOUR PAYMENT WILL BE PROCESSED ON 1/24/2014'. A second box for 'Travel Agency E & O - Surplus Lines Payment' shows a total payable of \$681.61, including a \$15.97 credit card fee. The transaction number is 512229, dated 1/24/2014 at 3:04:17 PM. The right panel, titled 'Electronic Fund Transfer Payment Entry', instructs the user to 'PRINT THIS PAGE FOR YOUR RECEIPT' and displays the transaction number 512229 and a message that policy documents will be sent shortly. A 'Next' button with a right arrow is circled in red at the bottom right of the right panel. The footer contains a 'QUIT' button and the address '175 Berkeley Street Boston, MA 02117'.

**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 Credit Card**

**Policy Payment**

Credit card number - \*\*\*\* \* 3294  
Expiration date of credit card 12/2016  
Amount to be paid \$681.61

**YOUR PAYMENT WILL BE PROCESSED ON 1/24/2014**

**Travel Agency E & O - Surplus Lines Payment**

Total payable - \$681.61  
includes a \$15.97 credit card fee.

Transaction Number 512229 @ 1/24/2014 3:04:17 PM

**Electronic Fund Transfer Payment Entry**

PRINT THIS PAGE FOR YOUR RECEIPT.

YOUR TRANSACTION NUMBER IS: 512229

YOUR POLICY DOCUMENTS WILL BE SENT TO YOU SHORTLY.

**Next**


QUIT 175 Berkeley Street Boston, MA 02117

1. Use the browser's print option to print the payment confirmation screen.
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

[<Log Out>](#)



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

**INSURED:** Travel Agency Legal name  
Doing Business As Name  
361 E. Hillsboro Blvd.  
If Applicable  
Deerfield Beach, FL 33441

**STATUS:** Active

**CONFIRMATION NUMBER:** 512229

**CONFIRMATION DATE:** 2/1/2014

**EXPIRATION DATE:** 2/1/2015

**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 954-788-5453    [www.managedinsurance.com](http://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. Use the browser's print option to print the coverage confirmation.
2. Click on the **Quit** button 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