TUTORIAL: Bind, Pay By Credit Card | Issue Policy

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STANDARD OPERATING PROCEDURE (SOP) DETAILS

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

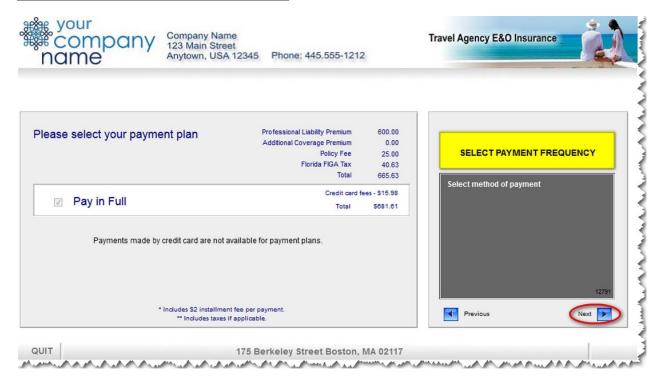
PART I-BIND, PAY BY CREDIT CARD, ISSUE POLICY

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



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



1. Type the applicant's credit card number into the designated field.

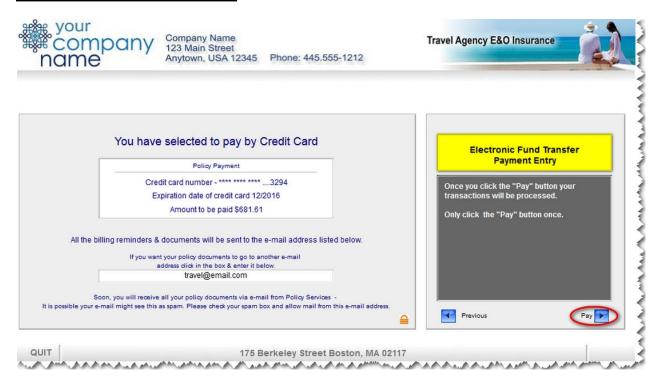
2. Click to select the applicant's expiration date month and year from the designated dropdown menus.

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

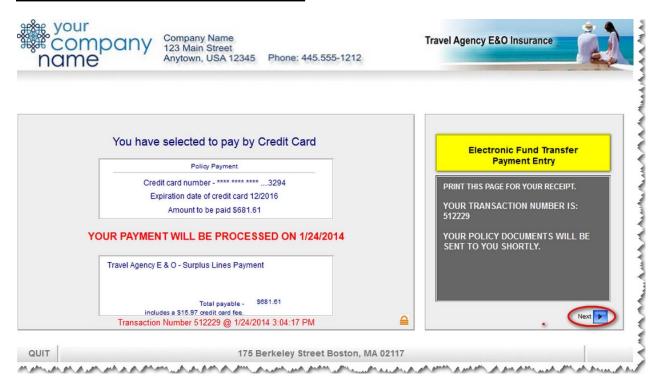
Bind, Pay, Issue Policy | Click To Pay



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



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

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Liberty		
Surplus Insurance Corporation-		
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	If Applicable	
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CONFIRMATION DATE:	2/1/2014	3
EXPIRATION DATE:	2/1/2015	
LIMITS:	\$1,000,000/\$1,000,000	
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CLASSIFICATION:	Retail Travel Agent	1
CONFIRMATION PROVIDED FOR:		
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THIS CONFIRMATION OF COVERA	GE IS PROVIDED ON BEHALF OF THE NAMED INSURED AND IS FOR	
	AND EXTENDS NO RIGHTS TO ANYONE OTHER THAN THE NAMED BE CANCELLED THE COMPANY WILL MAIL THE CERTIFICATE	
HOLDER A NOTICE OF CANCELL	ATION WITHIN 30 DAYS; HOWEVER, FAILURE TO ISSUE SUCH	
	HALL NOT OBLIGATE THE COMPANY TO ANY LIABILITY. Program Administrator	5
Ma	anaged Insurance Services, LLC 361 E. Hillsboro Blvd.	5
	Deerfield Beach, FL 33441	
Phone 954-788-5453	www.managedinsurance.com Fax 954-428-1175	an man

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