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 And 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

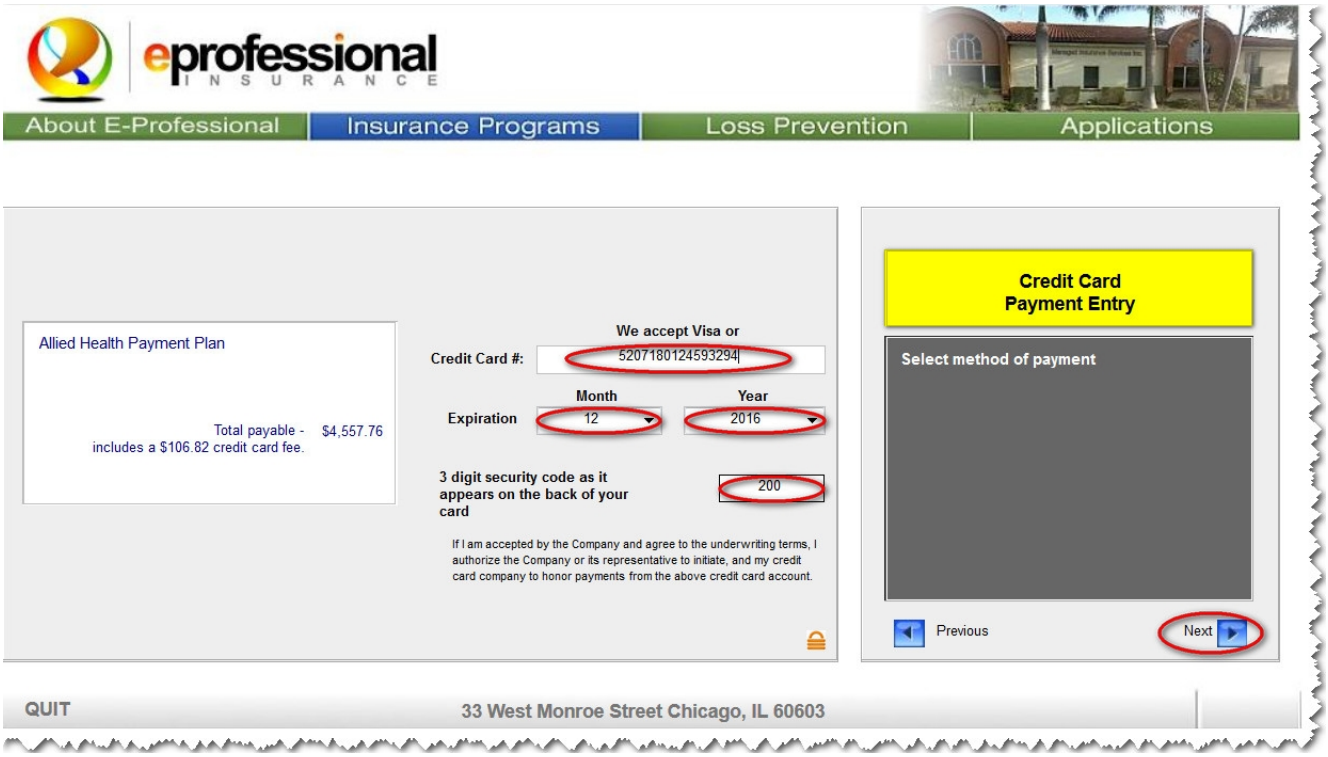
PART I–BIND/PAY BY CREDIT CARD / ISSUE POLICY

PART I–BIND AND 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 By Credit Card / Issue Policy | Credit Card Payment Entry

Bind/Pay By Credit Card / Issue Policy | Credit Card Payment Entry



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

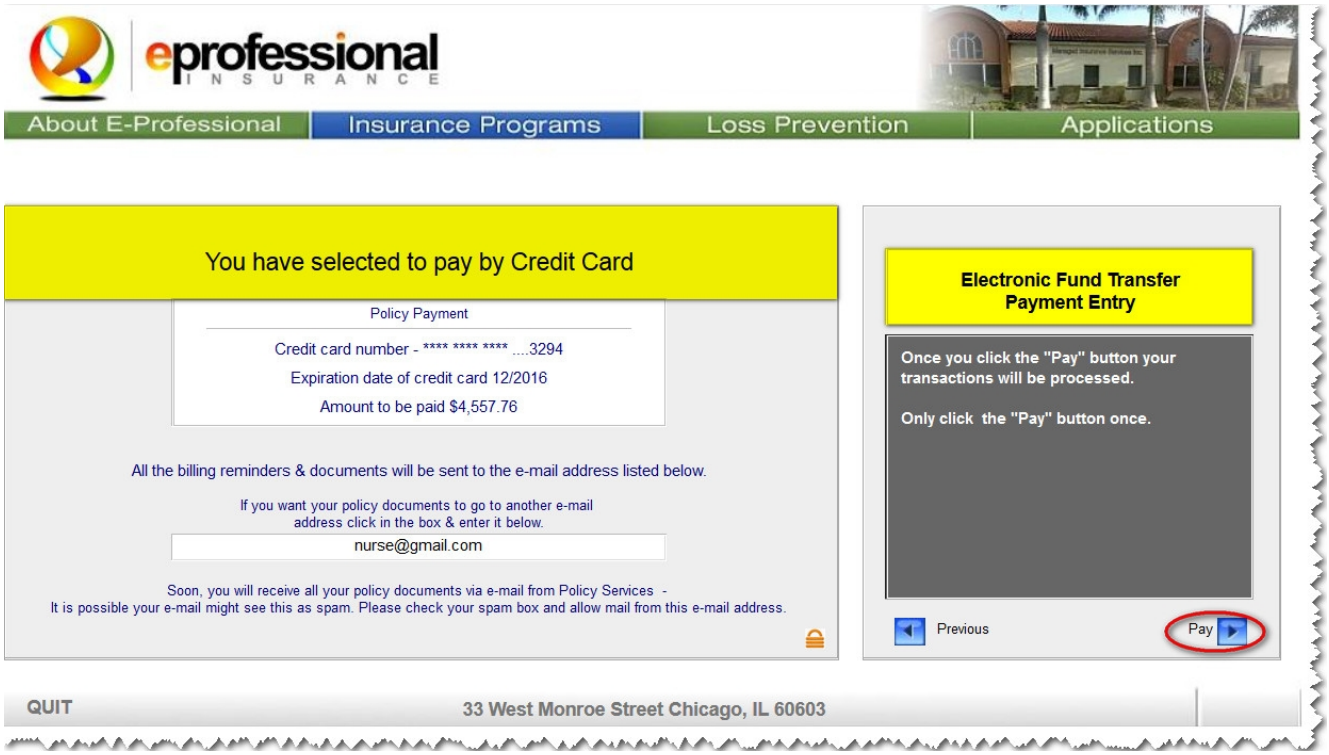
2. Click to select the applicant's expiration date month and year from the designated dropdown menus.

3. Type the applicant's three-digit security code into the designated field.

4. Click on the **Next** button. The Bind/Pay By Credit Card / Issue Policy | Click To Pay page displays.

2. Bind/Pay By Credit Card / Issue Policy | Click To Pay

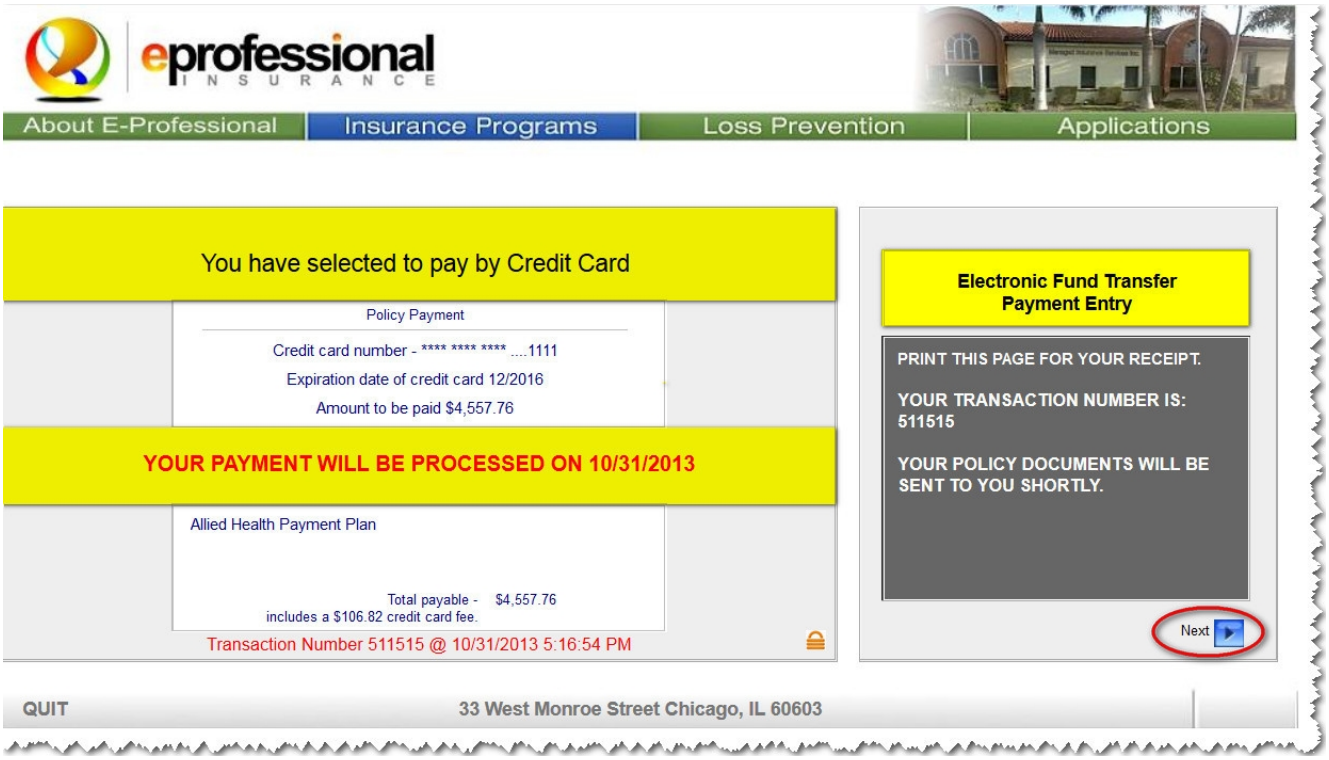
Bind/Pay By Credit Card / Issue Policy | Click To Pay



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

3. Bind/Pay By Credit Card / Issue Policy | Payment Confirmation

Bind/Pay By Credit Card / Issue Policy | Payment Confirmation

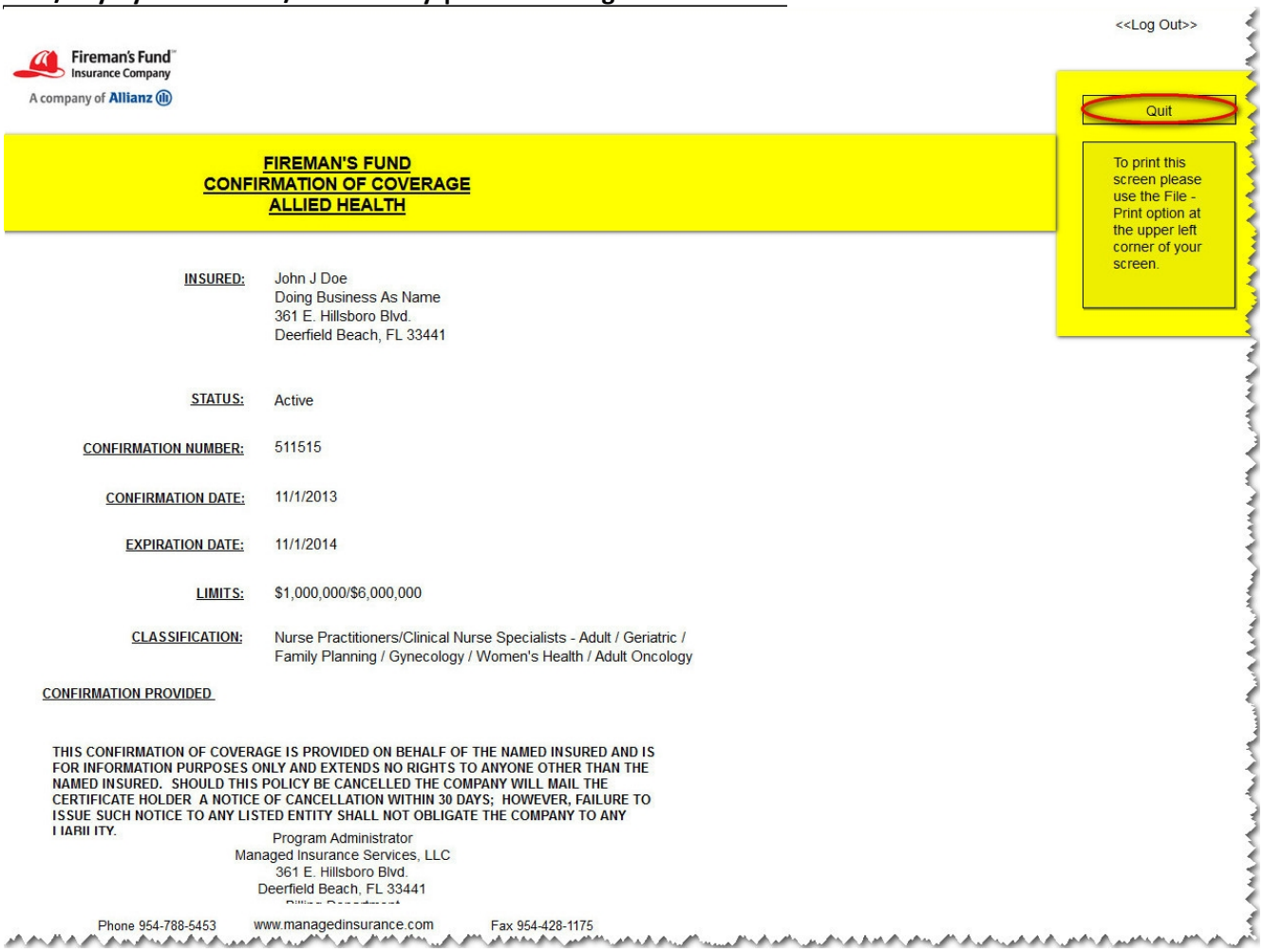


1. Click to select **File / Print** from the browser menu to print the payment confirmation screen.

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

4. Bind/Pay By Credit Card / Issue Policy | Coverage Confirmation

Bind/Pay By Credit Card / Issue Policy | Print 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 Credit Card / Issue Policy portion of this tutorial.

Revision History

Revision History

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