

TUTORIAL: Bind/Pay By Credit Card | Issue Dental Policy

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BIND/PAY BY CREDIT CARD | ISSUE DENTAL POLICY TUTORIAL



SOP#: _____ **Revision/Version:** 1.0
Effective Date: 2014

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Approved By: CEO Daniel O'Neal

Title: TUTORIAL: Bind And Pay By Credit Card | Issue Dental 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 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:

- QUICK START: Generate Dental Indication In OnLine-PL
- TUTORIAL: Generate Dental Indication In OnLine-PL
- QUICK START: Generate Dental Indication Online
- TUTORIAL: Generate Dental Indication Online
- QUICK START: Process OnLine-PL Dental Application Details
- TUTORIAL: Process OnLine-PL Dental Application Details
- QUICK START: Process Web Dental Application Details
- TUTORIAL: Process Web Dental Application Details
- QUICK START: Complete Dental Application Online
- TUTORIAL: Complete Dental Application Online
- QUICK START: Bind/Pay By Check | Issue Policy
- TUTORIAL: Bind/Pay By Check | Issue Policy
- QUICK START: Bind/Pay By Credit Card | Issue Policy
- TUTORIAL: Bind/Pay By Credit Card | Issue Policy
- QUICK START: Confirmation Emails
- TUTORIAL: Confirmation Emails

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 | Payment Frequency

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

The screenshot shows the E-Professional Insurance website interface. At the top, there is a navigation bar with the following items: "About E-Professional", "Insurance Programs", "Loss Prevention", and "Applications". The "Insurance Programs" item is highlighted in blue. Below the navigation bar, there is a main content area with a light gray background. On the left side of this area, there is a section titled "Please select your payment plan" with a sub-section for "Pay in Full" which is selected with a checkbox. To the right of this section is a table of charges:

Professional Liability Premium	2,728.00
Additional Coverage Premium	0.00
Policy Fee	25.00
Florida FIGA Tax	27.83
Total	2,780.83

Below the table, there is a line for "Credit card fees - \$66.74" and a "Total" of "\$2,847.57". A note below the table states: "Payments made by credit card are not available for payment plans." At the bottom of the main content area, there are two footnotes: "* Includes \$2 installment fee per payment." and "** Includes taxes if applicable." On the right side of the main content area, there is a dialog box titled "SELECT PAYMENT FREQUENCY" with a yellow header. The dialog box contains the text "Select method of payment" and a large gray area. At the bottom of the dialog box, there are two buttons: "Previous" and "Next". The "Next" button is circled in red. At the bottom left of the main content area, there is a "QUIT" button.

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

2. Bind/Pay By Credit Card / Issue Policy | Credit Card Payment

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

The screenshot shows the 'Credit Card Payment Entry' form on the eprofessional Insurance website. The form is titled 'Dental Professional Liability Payment Plan' and displays a total payable of \$2,847.57, including a \$66.73 credit card fee. The form includes the following fields and options:

- Credit Card #:** 5207180124593294 (circled in red)
- Expiration Date:** Month: 12 (circled in red), Year: 2016 (circled in red)
- 3 digit security code as it appears on the back of your card:** 200 (circled in red)

Below the form, there is a 'QUIT' button and a 'Next' button (circled in red) to proceed to the next step. The 'Previous' button is also visible.

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.

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

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

The screenshot shows 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 "You have selected to pay by Credit Card", displays the following information: "Policy Payment", "Credit card number - **** * 3294", "Expiration date of credit card 12/2016", and "Amount to be paid \$2,847.57". Below this, it states: "All the billing reminders & documents will be sent to the e-mail address listed below." and provides an email address field containing "dental@gmail.com". A "QUIT" button is located at the bottom left of this panel. The right panel, titled "Electronic Fund Transfer Payment Entry", contains the text: "Once you click the 'Pay' button your transactions will be processed. Only click the 'Pay' button once." At the bottom of this panel, there are two buttons: "Previous" and "Pay". The "Pay" button is circled in red. A "QUIT" button is also present at the bottom right of the right panel.

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

4. Bind/Pay By Credit Card / Issue Policy | Payment Confirm.

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

The screenshot displays the E-Professional Insurance website interface. At the top, there is a navigation menu with four items: "About E-Professional", "Insurance Programs", "Loss Prevention", and "Applications". The "Insurance Programs" item is highlighted in blue. To the right of the navigation menu is a small image of a building. Below the navigation menu, the main content area is divided into two columns. The left column contains a confirmation message: "You have selected to pay by Credit Card". Below this message is a box titled "Policy Payment" containing the following information: "Credit card number - **** * 3294", "Expiration date of credit card 12/2016", and "Amount to be paid \$2,847.57". Below this box is a red message: "YOUR PAYMENT WILL BE PROCESSED ON 3/28/2014". Below the red message is another box titled "Dental Professional Liability Payment Plan" containing the following information: "Total payable - \$2,847.57" and "includes a \$66.73 credit card fee.". At the bottom of this box is the text: "Transaction Number 513319 @ 3/28/2014 11:42:59 AM". The right column contains a yellow box titled "Electronic Fund Transfer Payment Entry". Below this box is a grey box containing the following text: "PRINT THIS PAGE FOR YOUR RECEIPT.", "YOUR TRANSACTION NUMBER IS: 513319", and "YOUR POLICY DOCUMENTS WILL BE SENT TO YOU SHORTLY.". At the bottom right of the grey box is a "Next" button with a blue arrow icon. At the bottom left of the main content area is a "QUIT" button.

1. Use the browser's print option to print the payment confirmation screen.
2. Click on the **Next** button. The Bind/Pay By Credit Card / Issue Policy | Coverage Confirmation page displays.

5. Bind/Pay By Credit Card / Issue Policy | Coverage Confirm.

Bind/Pay By Credit Card / Issue Policy | Print Coverage Confirmation



<<Log Out>>

**FIREMAN'S FUND
CONFIRMATION OF COVERAGE
DENTAL PROFESSIONAL LIABILITY**

INSURED: John Doe, D. D. S.
361 E. Hillsboro Blvd
Deerfield Beach, FL 33441

STATUS: Active

CONFIRMATION NUMBER: 513319

CONFIRMATION DATE: 4/1/2014

EXPIRATION DATE: 4/1/2015

LIMITS: \$1,000,000/\$3,000,000

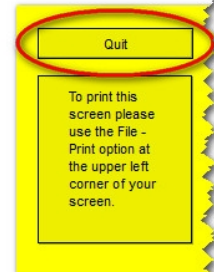
CLASSIFICATION: General Dentist

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.

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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 By Credit Card | Issue Policy portion of this tutorial.

Revision History

Revision History

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