TUTORIAL: Confirmation And Policy Document Emails

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CONFIRMATION AND POLICY DOCUMENT EMAILS TUTORIAL

SOP#:_____   **Revision/Version:** 1.0
Effective Date: 2013

Prepared By: Technical Writer Judy Thomas

Approved By: CEO Daniel O'Neal

Title: TUTORIAL: Confirmation And Policy Document Emails

Policy: This tutorial serves as a standard operating procedure for processing confirmation and policy document emails.

Purpose: To provide insurance agents and applicants with step-by-step instructions for processing confirmation and policy document emails.

Scope: This tutorial covers processing confirmation and policy document emails.

Responsibilities: Insurance agents and applicants are responsible for all of the tasks contained in this tutorial.

Definitions:

Overview: This tutorial was created in 2013 to help insurance agents and applicants process confirmation and policy document emails.

System Requirements

System Requirements

This tutorial assumes that the user:

1. Has access to the internet

Overview

Overview

This document was developed to assist insurance agents and applicants with processing confirmation and policy document emails.
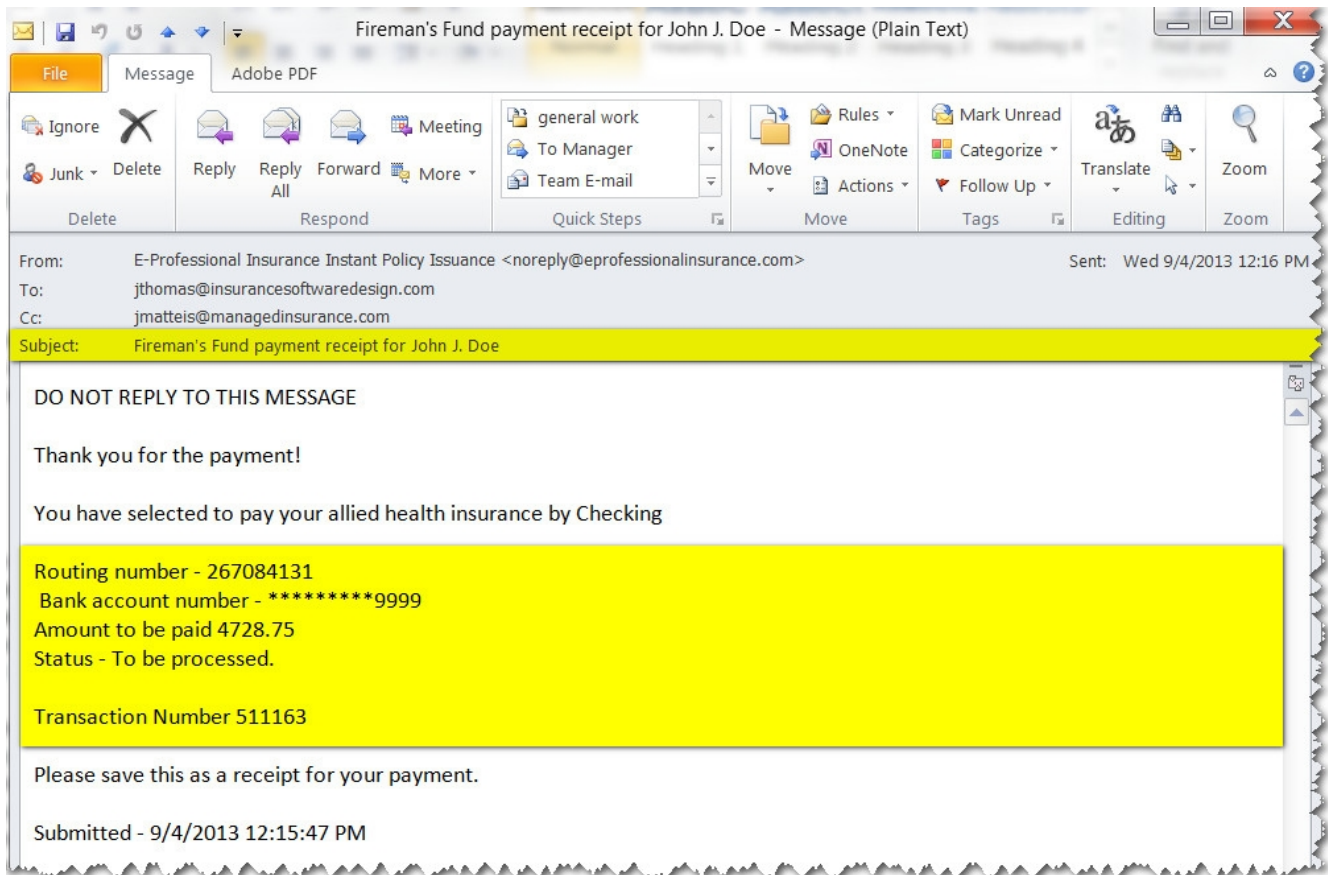
This document contains one main section:

- **I. Emails**

PART I–EMAILS

This section explains the purpose of the auto-generated email confirmation receipts and policy document emails that follow payment.
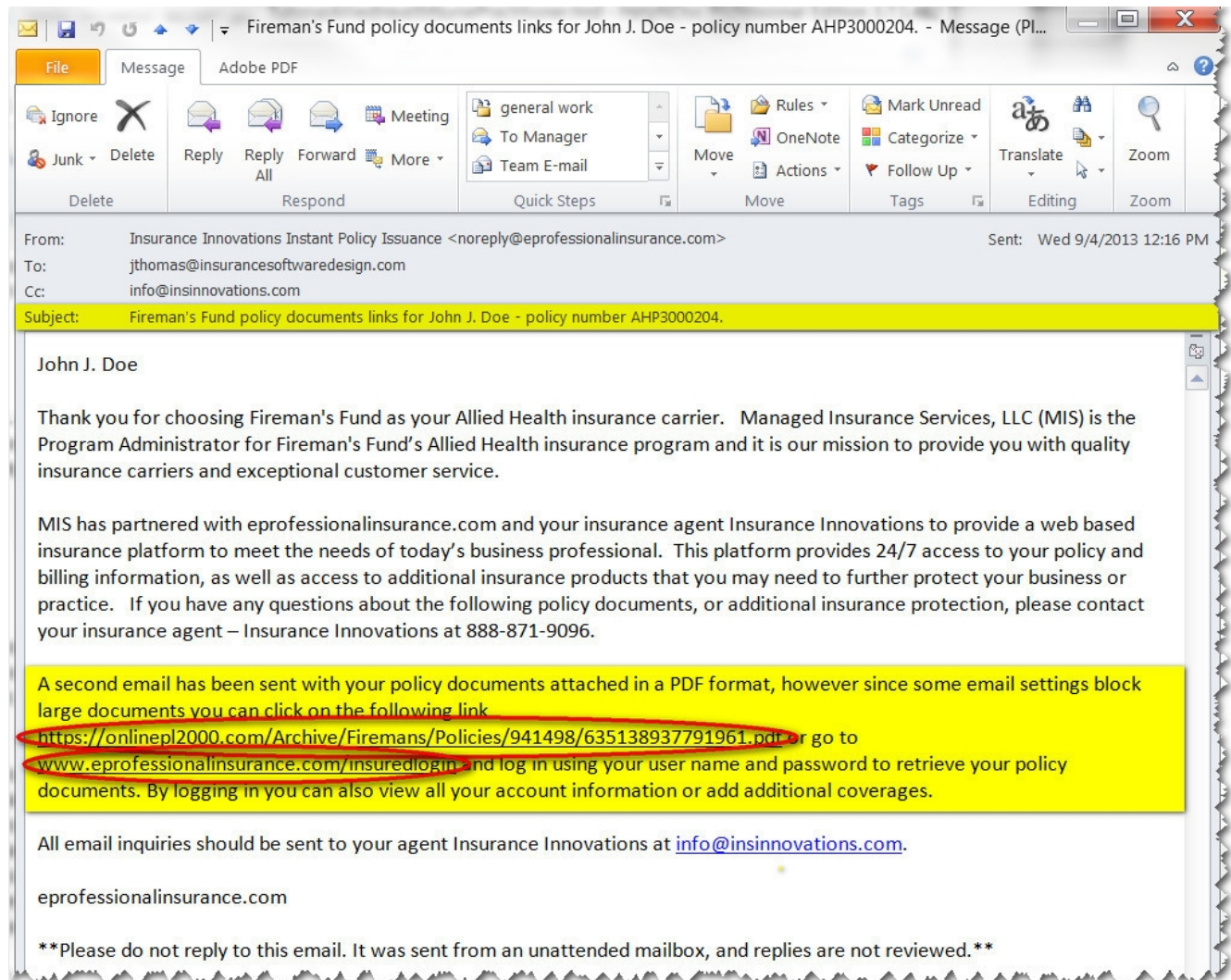
1. Emails | Payment Receipt/Confirmation

Emails | Payment Receipt/Confirmation

1. Review the information contained in payment receipt email, noting the applicant's routing, bank account and transaction number, as well as the amount paid.

2. Retain this email as a receipt of payment.

2. Emails | Policy Document Links

Emails | Policy Document Links

1. Review the information contained in the confirmation email, noting the applicant's policy number, links to policy documents on the web and email inquiry contact information.

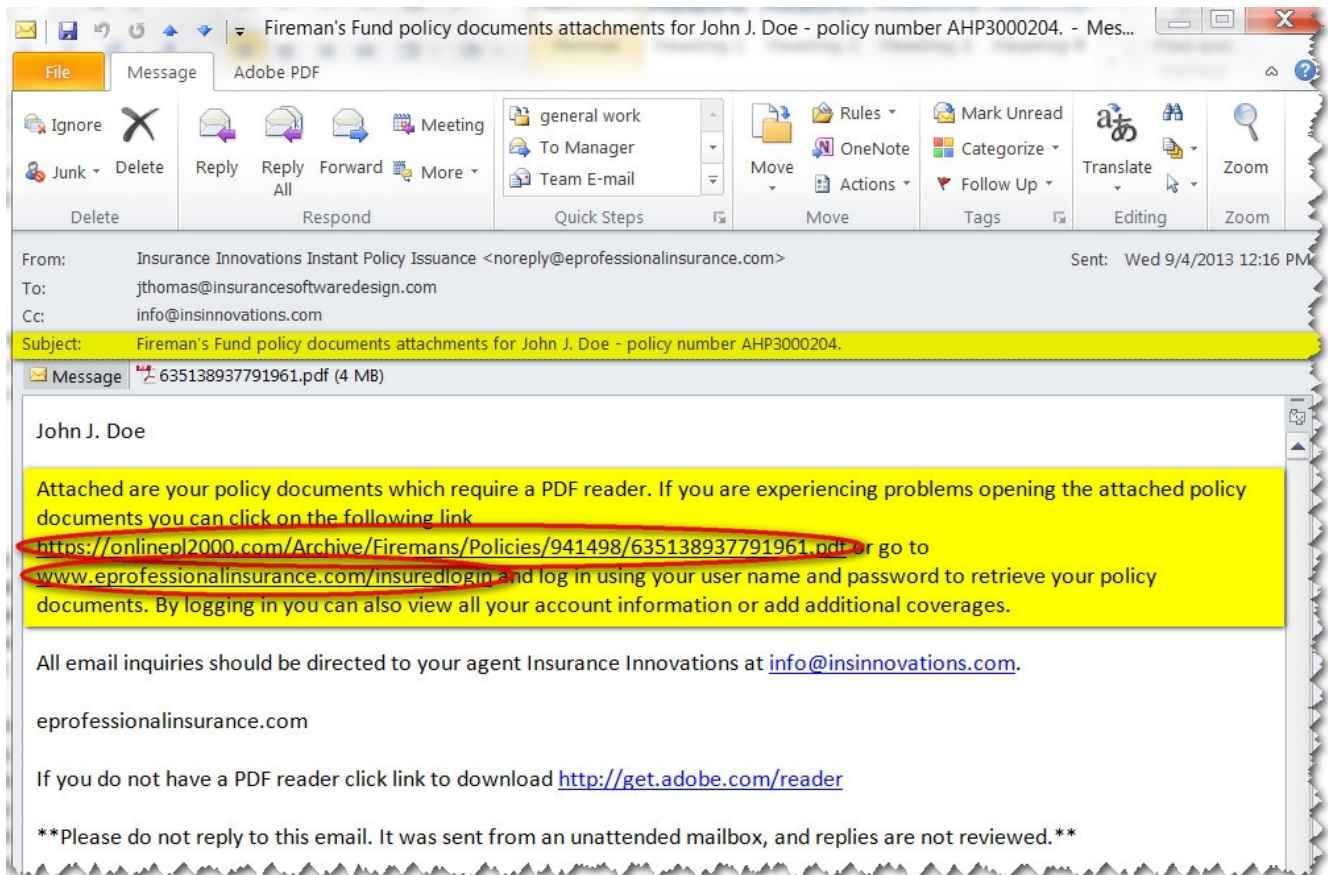2a. Click on the hyperlink provided in the body of the email to view the policy documents, or

2b. Log on to the portal with the user name and password at the URL provided in the email above.

NOTE: A second email, containing a PDF of the policy documents, is also emailed to the applicant.

3. Emails | Policy Document Attachments

Emails | Policy Document Attachments

1. Review the attached policy documents. **NOTE:** Documents can also be viewed online by following the instructions included in the body of the email.

This concludes the Emails portion of this tutorial.

Revision History

Revision History

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