TUTORIAL: Generate Dental Indication Online

Table of contents

STANDARD OPERATING PROCEDURE (SOP) DETAILS	3
System Requirements	
Overview	
PART I-GENERATE INDICATION	6
1. Generate Indication Begin Quote	7
2. Generate Indication General Questions	
3. Generate Indication Procedures	9
4. Generate Indication Membership Certification	10
5. Generate Indication Additional Credit Verification	11
6. Generate Indication Professional Liability Quote Indication	12
Revision History	13

GENERATE DENTAL INDICATION ONLINE TUTORIAL



SOP#:_____ Revision/Version: 1.0

Effective Date: 2013

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Approved By: CEO Daniel O'Neal

Title: TUTORIAL: Generate Dental Indication Online

Policy: This tutorial serves as a standard operating procedure for generating dental

indications online.

Purpose: To provide instructions for generating dental indications online.

Scope: This tutorial covers generating dental indications online.

Responsibilities: Insurance agents are responsible for generating dental indications online.

Definitions:

Overview: This tutorial was created in 2014 to help insurance agents generate dental indications online.

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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 Dental 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 agents in generating dental indications online.

This document contains one section:

• I. Generate Indication

RELATED TUTORIALS:

- QUICK START: Generate Dental Indication Online
- 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

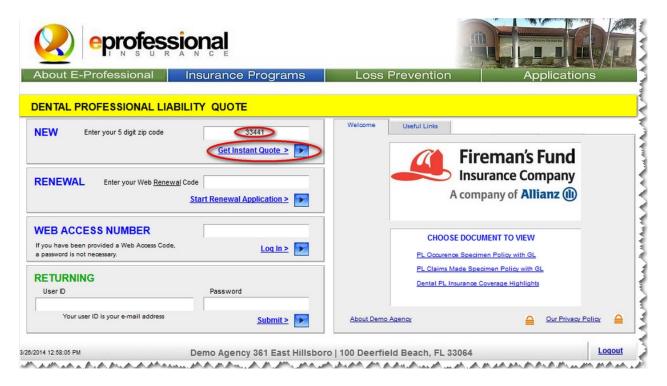
PART I--GENERATE INDICATION

PART I--GENERATE INDICATION

This section illustrates how to generate a dental indication online.

1. Generate Indication | Begin Quote

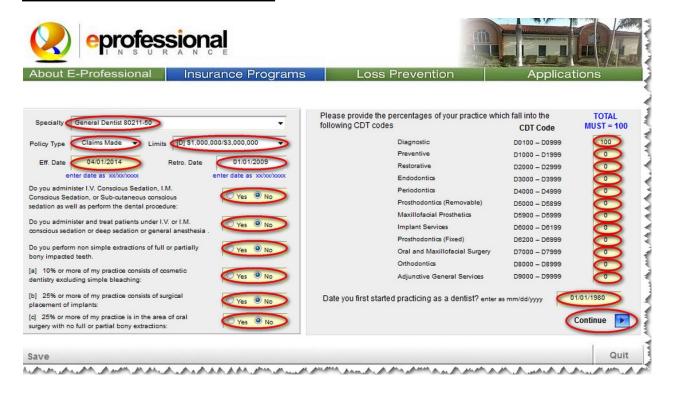
Generate Indication | Begin Quote



- 1. Type the applicant's five-digit zip code into the designated field.
- 2. Click on the **Get Instant Quote** link. The Generate Indication | General Questions page displays.

2. Generate Indication | General Questions

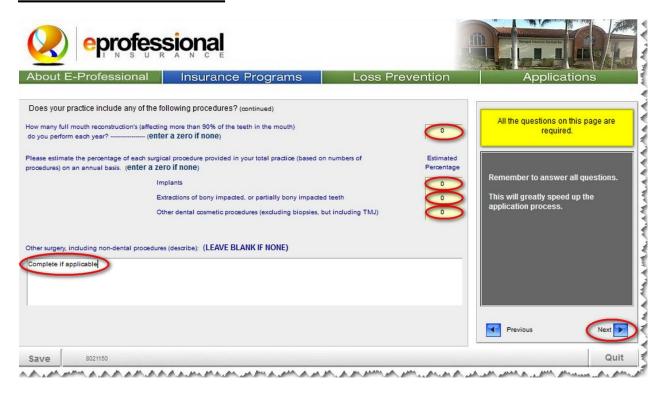
Generate Indication | General Questions



- 1. Click to select the applicant's specialty from the designated dropdown menu.
- 2. Click to select the applicant's policy type from the designated dropdown menu.
- 3. Click to select the applicant's limits preference from the designated dropdown menu.
- 4. Type the applicant's effective date into the designated field.
- 5. Type the applicant's retro date into the designated field.
- 6. Click to select whether the applicant administers conscious sedation, I.M. conscious sedation or sub-cutaneous conscious sedation in addition to performing dental procedures.
- 7. Click to select whether the applicant administers and treats patients under I.V. conscious sedation, I.M. conscious, deep or general anesthesia.
- 8. Click to select whether the applicant performs non-simple extractions of full or partially bony impacted teeth.
- Click to select whether 10% or more of the applicant's practice consists of cosmetic dentistry excluding simple bleaching.
- 10. Click to select whether 25% or more of the applicant's practice consists of surgical placement of implants.
- 11. Click to select whether 25% or more of the applicant's practice is in the area of oral surgery with no full or partial bony extractions.
- 12. Type the percentage of the applicant's practice that fall into the designated CDT code fields. **NOTE:** The figures must total 100, and all fields must contain an entry, which may be "0," if applicable.
- 13. Type the date the applicant first started practicing as a dentist into the designated field.
- 14. Click on the **Continue** button. The Generate Indication | Procedures page displays.

3. Generate Indication | Procedures

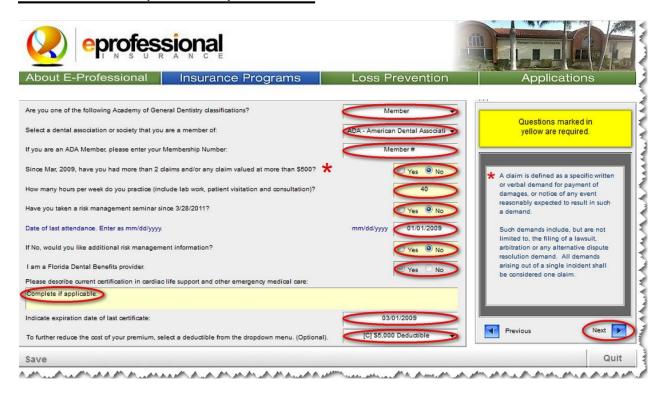
Generate Indication | Procedures



- 1. Type the amount of full mouth reconstructions, affecting more than 90% of the teeth, that the applicant performs each year. **NOTE:** Type a "0" if none are performed.
- 2. Type the percentages of each surgical procedure provided, based on total number of procedures performed annually, into the designated fields. **NOTE:** The total of all three entries must equal 100, to represent 100% of procedures. Type a "0" if none are performed.
- 3. Type a description of other dental procedures not represented in the above fields, if applicable.
- 4. Click on the Next button. The Generate Indication | Membership Certification page displays.

4. Generate Indication | Membership Certification

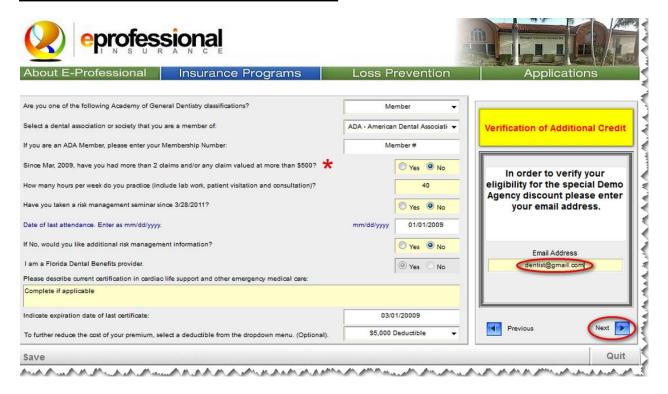
Generate Indication | Membership Certification



- 1. Click to select the applicant's academy of general dentistry classification from the designated dropdown menu.
- 2. Click to select the applicant's dental association or society membership from the designated dropdown menu.
- 3. Type the applicant's ADA membership number into the designated field if applicable.
- 4. Click to select whether the applicant has had more than 2 claims and/or any claim valued at \$500 or more since March 2009.
- 5. Type the number of hours per week the dentist practices into the designated field.
- 6. Click to select whether the applicant has taken a risk management seminar since 3/28/2011.
- 7. Type the date (MM/DD/YYYY) the applicant last attended a risk management seminar into the designated field.
- 8. If the applicant selected that they have not taken a risk management seminar since March 28, 2011, click to select whether they would like to receive additional risk management information.
- 9. Type a description of the applicant's current certification in cardiac life support and other emergency medical care into the designated field, if applicable.
- 10. Type the expiration date for the applicant's last certificate into the designated field.
- 11. Click to select a deductible from the designated dropdown menu, if desired.
- 12. Click on the Next button. The Generate Indication | Additional Credit Verification page displays.

5. Generate Indication | Additional Credit Verification

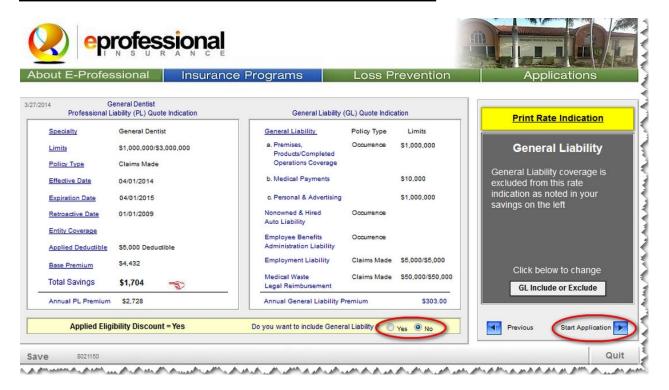
Generate Indication | Additional Credit Verification



- 1. Type the applicant's email address into the designated field so that it can be used for verification of additional credit.
- 2. Click on the **Next** button. The Generate Indication | Dental Professional Liability Quote Indication page displays.

6. Generate Indication | Professional Liability Quote Indication

Generate Indication | Dental Professional Liability Quote Indication



- 1. Click to select or change whether the applicant wants to include general liability.
- 2. Click on the **Start Application** button.

This concludes the Generate Indication portion of this tutorial.

Revision History

Revision History

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