

TUTORIAL: Generate Travel Agency E&O Indication Online

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GENERATE TRAVEL AGENCY E&O INDICATION ONLINE TUTORIAL



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

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Approved By: CEO Daniel O'Neal

Title: TUTORIAL: Generate Travel Agency E&O Indication Online

Policy: This tutorial serves as a standard operating procedure for generating travel agency E&O indications online.

Purpose: To provide instructions for generating travel agency E&O indications online.

Scope: This tutorial covers generating travel agency E&O indications online.

Responsibilities: Insurance agents are responsible for generating travel agency E&O indications online.

Definitions:

Overview: This tutorial was created in 2013 to help insurance agents generate travel agency E&O indications 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 agents in generating travel agency E&O indications online.

This document contains one section:

- [I. Generate Indication](#)

RELATED TUTORIALS:

- TUTORIAL: Process Travel Agency E&O Indications Online
- TUTORIAL: Bind, Pay By Check | Issue Policy
- TUTORIAL: Bind, Pay By Credit Card | Issue Policy
- TUTORIAL: Confirmation And Policy Document Emails

PART I--GENERATE INDICATION

PART I--GENERATE INDICATION

This section illustrates how to generate a travel agency E&O indication online.

1. Generate Indication | Begin Quote

Generate Indication | Begin Quote

The screenshot shows a website header with the logo "your company name" and contact information: "Company Name, 123 Main Street, Anytown, USA 12345, Phone: 445.555-1212". To the right is a banner for "Travel Agency E&O Insurance" with an image of a couple on a beach.

The main content area is divided into two columns. The left column has a yellow header "TRAVEL AGENCY INSTANT QUOTE" and four sections: "NEW" with a zip code field (33441) and a "Get Instant Quote >" button; "RENEWAL" with a "Web Renewal Code" field and a "Start Renewal Application >" button; "WEB ACCESS NUMBER" with a field and a "Log In >" button; and "RETURNING" with "User ID" and "Password" fields and a "Submit >" button. The right column has a "Welcome to..." message with the logo and a paragraph of text about the agency's services.

At the bottom, there is a footer with the text "Your Travel Association Logo Can Be Here Address | Address2 City, AZ 12345" and a "Logout" link.

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

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Travel Agency Instant Quote Effective Date:

Travel Agency Instant Quote in Broward County, Deerfield Beach, - FL, 33441
Retail Travel Agent

Does your company derive 50% or more of its gross receipts acting as a tour operator and or a meeting planner? Yes No

Is your company located in a residence? Yes No

Year company established ? 1952

Type of business structure? Corporation

Percentage of Annual Gross Receipts derived from corporate travel (enter as whole number: i.e. 37) 100%

Number of years continuously working as a travel agent or tour operator ? 4 + Years

Have any claims, suits or proceedings been brought during the past five (5) years against you or your predecessors in business, affiliates, or any of your past or present partners, owners, officers, sales persons or employees? Yes No

Do you or any of your full time employees hold any of the following certifications: Yes No

Certified Corporate Travel
Certified Master Cruise Counselor:
Certified Tour Professional:
Certified Travel Counselor:

Travel Agency Tour Operator E&O Program

Did you know that Liberty Mutual offers a flexible payment plan

Start Over Next

Quit

1. Click to select whether the applicant's company derives 50% or more of its gross receipts acting as a tour operator and or a meeting planner.
2. Click to select whether the applicant's company is located in a residence.
3. Click to select the year the applicant's company was established from the dropdown menu.
4. Click to select the applicant's business structure type from the designated dropdown menu.
5. Type the percentage of the applicant's annual gross receipts that are derived from corporate travel into the designated field.
6. Click to select the number of years the applicant has been working continuously as a travel agent or tour operator from the designated dropdown menu.
7. Click to select whether any claims, suits or proceedings have been brought against them or their predecessors in business, affiliates, or any of their past or present partners, owners, officers, sales persons or employees within the past five years.
8. Click to select whether the applicant's full-time employees hold any of the listed certifications.
9. Click on the **Next** button. The Generate Indication | Limits/Deductibles page displays.

3. Generate Indication | Limits/Deductibles

Generate Indication | Limits/Deductibles

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Retail Travel Agency

Limits Requested: \$1,000,000/\$1,000,000 ? Deductible: 25000 ?
Quote Effective Date: 02/01/2014 ? Deductible Type: Indemnity Only ?
(Est.) Annual Gross Sales for the next 12 months. (Enter numeric dollar amount ex: 100000) 1000000 ?

Please indicate if travel is arranged to any of the following countries or regions and provide the approximate percentage of Annual Gross Receipts from these bookings: (Total must = 100)

US and Canada	50
Caribbean & W Europe	50
Middle East	0
Other	0

Is there an in-house training program for all travel agents who work for your firm? Yes No

Do you or your employees regularly take familiarization trips to destinations frequently recommended to travelers? Yes No

Do you routinely offer Travel Insurance? Yes No

If yes please list the top 3 carriers. Carrier 1: Travel Guard Carrier 2: CSA Travel Prot Carrier 3: Tour Supplier

If the traveler declines Travel Insurance, is the declination documented? Yes No

Travel Agency Tour Operator E&O Program

Click on the question marks for additional explanation.

Complete this page & click the Next button to get a free no obligation rate indication.

Previous Next Quit

1. Click to select the applicant's desired limits from the dropdown menu.
2. Click to select the applicant's deductible from the dropdown menu.
3. Type or click to select the applicant's effective date into the field.
4. Click to select the deductible type from the designated dropdown menu.
5. Type the applicant's annual gross sales for the next 12 months into the designated field.
6. Type to indicate the percentage of annual gross receipts in the fields for the corresponding regions. **NOTE:** The figures must total 100, and all fields must contain an entry, which may be a "0," if applicable.
7. Click to select whether there is an in-house training program for all travel agents who work for the applicant's firm.
8. Click to select whether the applicant's employees regularly take fam tips to destinations frequently recommended to travelers.
9. Click to select whether the applicant routinely offers travel insurance. **NOTE:** If responded "Yes" to this question, click to select the top three carriers from the designated dropdown menus.
10. Click to select whether the applicant documents traveler insurance declinations.
11. Click on the **Next** button. The Generate Indication | Travel Agency Instant Quote page displays.

4. Generate Indication | Travel Agency Instant Quote

Generate Indication | Travel Agency Instant Quote

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Travel Agency Instant Quote Effective Date: 02/01/2014

Travel Agency Instant Quote in Broward County Deerfield Beach, - FL, 33441
Retail Travel Agent

Annual Receipts	\$1,000,000
Classification	Retail Travel Agent
Limits	\$1,000,000/\$1,000,000
Deductible Type	Indemnity Only
Deductible	\$25,000
Policy Type	Occurrence
Effective Date	02/01/2014
Expiration Date	02/01/2015

Annual PL Premium \$600.00

Add'l Coverage Premium \$0.00

Policy Fee \$25.00

Taxes & Fees \$40.63

Total \$665.63

\$665.63

Print Quote

You can start the application process or have one of our licensed agents contact you.

Email

Comments/Questions

Submit Comments/Questions

Begin the application process now.

Click the next button on the bottom right of your screen.

At the end of the application process you will be able to purchase your policy through our secure payment gateway.

Your policy documents will be e-mailed to you after purchasing through your secure login portal.

12724

Previous Next

1. Review the customer's data, charges and fees to ensure they are accurate.
2. Click on the **Next** button. The Generate Indication | Corporate Insured Name page displays.

5. Generate Indication | Corporate Insured Name

Generate Indication | Corporate Insured Name

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Retail Travel Agency

Legal Entity Name ?
Travel Agency Legal Name

Doing Business As (DBA)
Doing Business As Name

Phone 333-333-3333 Fax 555-555-5555

Office Contact
Office Contact

E-mail (This will also be your login) travel@email.com

Please choose a password (for later retrieval of this quote) password

Website www.travel.com

Travel Agency Tour Operator E&O Program

?
Click on the question marks for additional explanation.

Previous Next

Quit

1. Type the applicant's name legal entity name into the designated field.
2. Type the applicant's DBA name into the designated field, if applicable.
3. Type the applicant's phone number into the designated field, if applicable.
4. Type the applicant's fax number into the designated field, if applicable.
5. Type the applicant's office contact name into the Office Contact field.
6. Type the applicant's email address into the designated field.
7. Type a password into the designated field.
8. Type the applicant's website address into the designated field.
9. Click on the **Next** button. The Generate Indication | Professional Liability Quote Indication page displays.

6. Generate Indication | Professional Liability Quote Indication

Generate Indication | Professional Liability Quote Indication

your company name
Company Name
123 Main Street
Anytown, USA 12345 Phone: 445.555-1212

Travel Agency E&O Insurance

Retail Travel Agency

Professional Liability (PL) Quote Indication

Annual Receipts	\$1,000,000
Classification	Retail Travel Agent
Limits	\$1,000,000/\$1,000,000
Deductible Type	Indemnity Only
Deductible	\$25,000
Policy Type	Occurrence
Effective Date	02/01/2014
Expiration Date	02/01/2015

Annual PL Premium \$600.00

Add'l Coverage Premium \$0.00

Policy Fee \$25.00

Taxes & Fees \$40.63

Total \$665.63

Thank you for your inquiry

You can start the application process below or have one of our licensed agents contact you .

travel@email.com

Via Phone Via E-Mail

Comments/Questions

Submit Comments/Questions

Travel Agency Tour Operator E&O Program

Your Annual Professional Liability Premium is

\$666

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Previous Next

Quit

1. Click on the **Next** button.

This concludes the Generate Indication portion of this tutorial.

Revision History

Revision History

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