

QUICK START | Change Groups In OnLine-PL

Purpose: This quick start is meant to serve as a supplement to the Change Groups In OnLine-PL tutorial.

PART I-CHANGE GROUPS:

From the Main Menu:

Apply Change:

1. Click on the **Group** tab. The Group tabbed page displays.
2. Click on the Group Name dropdown menu to select a new group name.
NOTE: If the group is not listed, proceed to step 3.
3. Click on the **Change/Corp/Group Name** button. A new Group tabbed page displays.

Confirm Change:

1. Type the new corporate name into the designated field, if applicable.
2. Type the new group name/DBA into the designated field, if applicable.
3. Click on the **Change** button. A popup box displays.
4. Click on the **Yes** button. The underwriting screen displays.

Continue or Exit:

- 1a. If the underwriter has made all of the necessary changes to the policy, click on the **Main** tab to exit.
- 1b. If the underwriter wishes to make additional changes to the policy, click on the **Change** tab.