

TUTORIAL: Change Addresses in OnLine-PL

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CHANGE ADDRESSES IN ONLINE-PL TUTORIAL



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Title: TUTORIAL: Change Addresses In OnLine-PL

Policy: This tutorial serves as a standard operating procedure for processing changes to addresses in OnLine-PL.

Purpose: To provide the underwriter with instructions for processing changes to addresses in OnLine-PL.

Scope: This tutorial covers processing changes to addresses in OnLine-PL.

Responsibilities: Underwriters are responsible for processing changes to addresses in OnLine-PL.

Definitions: The underwriter is responsible for processing changes to addresses in OnLine-PL.

Overview: This tutorial was created in 2013 to help underwriters process changes to addresses in OnLine-PL.

System Requirements

System Requirements:

This tutorial assumes that the user:

1. Has the 2X client installed on their computer
2. Is set up with an account in OnLine-PL
3. Is an underwriter, and has access to the related functionality in OnLine-PL.

Overview

Overview:

This document was developed to assist underwriters in processing changes to addresses in OnLine-PL.

NOTE: The screenshots in this tutorial demonstrate making changes to physician addresses. Screens may differ slightly from other lines of business.

This document contains one main section:

- [I-Change Addresses](#)

RELATED TUTORIALS:

- QUICK START: Log On to OnLine-PL Through 2X Client
- TUTORIAL: Log On to OnLine-PL Through 2X Client
- QUICK START: Access Insured Records and Change Menu In OnLine-PL
- TUTORIAL: Access Insured Records and Change Menu In OnLine-PL
- QUICK START: Change Limits In OnLine-PL
- TUTORIAL: Change Limits In OnLine-PL
- QUICK START: Change Specialties In OnLine-PL
- TUTORIAL: Change Specialties In OnLine-PL
- QUICK START: Change Territories In OnLine-PL
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- QUICK START: Change Groups In OnLine-PL
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- QUICK START: Change Credits In OnLine-PL
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- QUICK START: Change Addresses In OnLine-PL
- QUICK START: Change Effective Dates In OnLine-PL
- TUTORIAL: Change Effective Dates In OnLine-PL
- QUICK START: Change Expiration Dates In OnLine-PL
- TUTORIAL: Change Expiration Dates In OnLine-PL
- QUICK START: Change Retro Dates In OnLine-PL
- TUTORIAL: Change Retro Dates In OnLine-PL
- QUICK START: Change General Information In OnLine-PL
- TUTORIAL: Change General Information In OnLine-PL
- QUICK START: Change Deductibles In OnLine-PL
- TUTORIAL: Change Deductibles In OnLine-PL
- QUICK START: Change Overrides In OnLine-PL
- TUTORIAL: Change Overrides In OnLine-PL
- QUICK START: Change Premium Endorsements In OnLine-PL
- TUTORIAL: Change Premium Endorsements In OnLine-PL
- QUICK START: Change Fees & Payments In OnLine-PL
- TUTORIAL: Change Fees & Payments In OnLine-PL
- QUICK START: Cancel Policy In OnLine-PL
- TUTORIAL: Cancel Policy In OnLine-PL

PART I--CHANGE ADDRESSES

PART I--CHANGE ADDRESSES

This section illustrates how the underwriter makes changes to practice, billing and secondary addresses in OnLine-PL.

1. Change Addresses | Apply Change

Change Addresses | Apply Change

Limits	Specialty	Territory	Group	Credits	Address
Eff Date	Exp Date	Retro Date	General	Deductible	Override
Premium End	Other	Other	Fees & Pymts	Change	

[Change Physicians Professional Liability Policy Menu](#)
John Jacob Doe, M. D.
361 E. Hillsboro Blvd.
Deerfield Beach, FL 33441

[Return](#)

1. Click on the **Address** tab. The Address tabbed page displays.

Address

Practice Address for John Jacob Doe, M. D.

Address	Suite/Address 2	City	County	State	Zip
361 E. Hillsboro Blvd.		Deerfield Beach	Broward	FL	33441

Set with Practice

Billing/Mailing Address for John Jacob Doe, M. D.

Address	Suite/Address 2	City	State	Zip
361 E. Hillsboro Blvd.		Deerfield Beach	FL	33441

Set with Practice

Secondary Address for John Jacob Doe, M. D.

Address	Suite/Address 2	City	State	Zip
361 E. Hillsboro Blvd.		Deerfield Beach	FL	33441

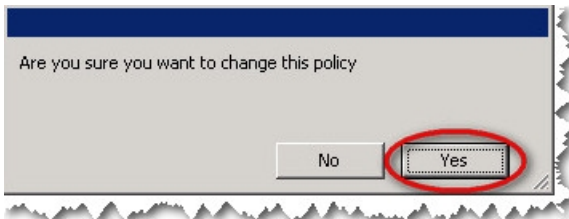
[Exit](#) [Change](#)

2. Type the new information into the applicable field(s) until all necessary changes have been made.

3. Click on the **Change** button. A popup box displays.

2. Change Addresses | Confirm Change

Change Addresses | Confirm Change



1. Click on the **Yes** button. The Underwriting screen displays.

The Underwriting screen features a navigation bar with tabs: PIC (yellow), Reports, Coverages, Change (circled in red), Quote, and Main (circled in red). Below the tabs is a form with the following fields:

Master Account	First Name	Middle Name	Last Name	Suffix	Degree
9141353	John	Jacob	Doe		M. D.
Address	Suite/Address 2	City	County	State	Zip
361 E. Hillsboro Blvd.		Deerfield Beach	Broward	FL	33441
Corp. Name	Medical School	Loc Tenen	Office Manager		
	Test School	31 Days			

2a. If the underwriter has made all necessary changes to the policy, click on the **Main** tab to exit.

2b. If the underwriter wishes to make additional changes to the policy, click on the **Change** tab.

This concludes the Change Addresses portion of this tutorial.

Revision History

Revision History:

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