

TUTORIAL: Change Classification In OnLine-PL

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CHANGE CLASSIFICATION IN ONLINE-PL TUTORIAL



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Title: TUTORIAL: Change Classification In OnLine-PL

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

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

Scope: This tutorial covers processing a change to a classification in OnLine-PL.

Responsibilities: Underwriters are responsible for processing a change to a classification in OnLine-PL.

Definitions: The underwriter is responsible for processing a change to a classification in OnLine-PL.

Overview: This tutorial was created in 2013 to help underwriters process a change to a classification 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 a change to a classification in OnLine-PL.

NOTE: The screenshots in this tutorial demonstrate making changes to a travel agency E&O classification. Screens may differ slightly for other lines of business.

This document contains one main section:

- [I-Change Classification](#)

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
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- QUICK START: Change Effective Dates In OnLine-PL
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- QUICK START: Change Fees & Payments In OnLine-PL
- TUTORIAL: Change Fees & Payments In OnLine-PL
- QUICK START: Change General Information In OnLine-PL
- TUTORIAL: Change General Information In OnLine-PL
- QUICK START: Change Gross Receipts In OnLine-PL
- TUTORIAL: Change Gross Receipts In OnLine-PL
- QUICK START: Change Groups In OnLine-PL
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- QUICK START: Change Limits In OnLine-PL
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- QUICK START: Change Overrides In OnLine-PL
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- QUICK START: Change Premium Endorsements In OnLine-PL
- TUTORIAL: Change Premium Endorsements In OnLine-PL
- QUICK START: Change Retro Dates In OnLine-PL
- TUTORIAL: Change Retro Dates In OnLine-PL
- QUICK START: Change Specialties In OnLine-PL
- TUTORIAL: Change Specialties In OnLine-PL
- QUICK START: Change Territories In OnLine-PL
- TUTORIAL: Change Territories In OnLine-PL
- QUICK START: Cancel Policy In OnLine-PL
- TUTORIAL: Cancel Policy In OnLine-PL

PART I--CHANGE CLASSIFICATION

PART I--CHANGE CLASSIFICATION

This section illustrates how the underwriter gets new rates for and make changes to a classification in OnLine-PL.

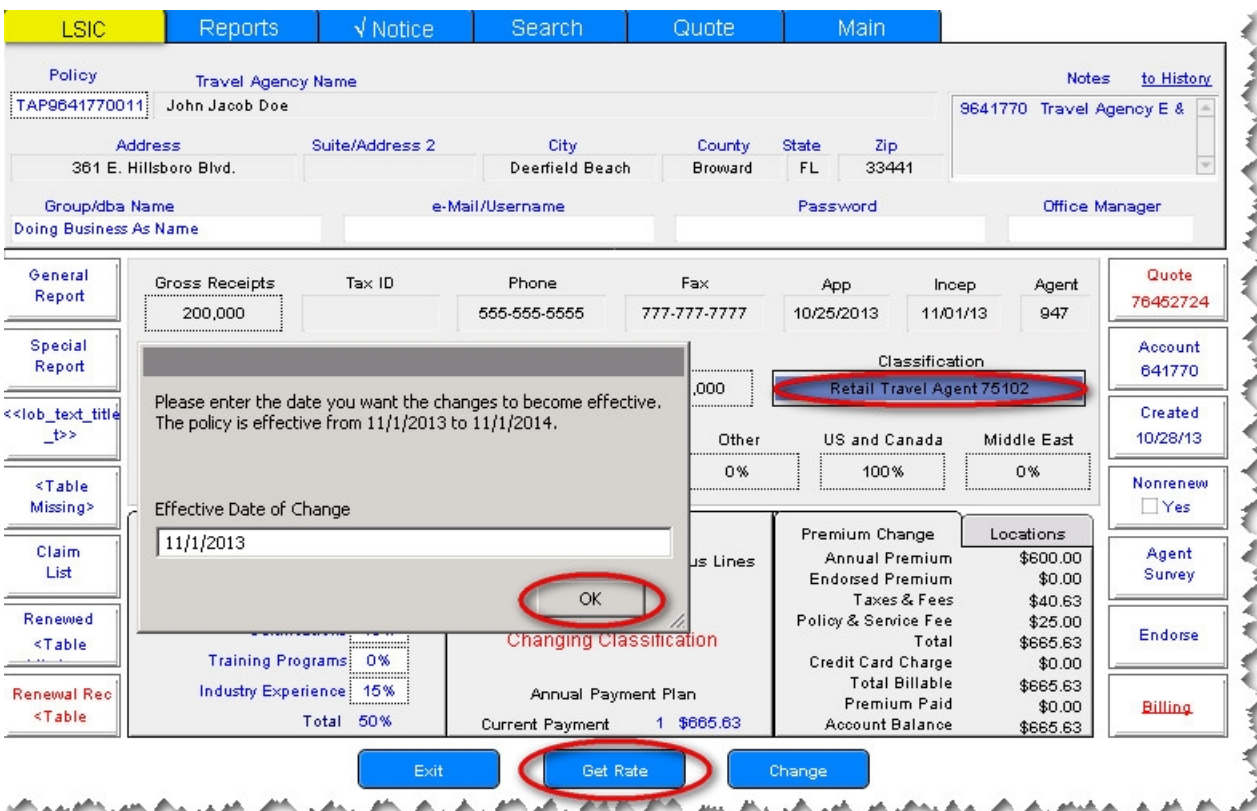
1. Change Classification | Get Rate

Change Classification | Get Rate

From the Change Menu:



1. Click on the **Classification** tab. The insured's record displays, with the Classification field highlighted.



2. Click to select a new classification from the designated dropdown menu.
3. Click on the **Get Rate** button. The effective date of change popup box displays.
4. Click on the **OK** button. The CHANGED CLASSIFICATION popup box displays.



5. Click on the **OK** button. The Change Classification | Confirm Change page displays.

2. Change Classification | Confirm Change

Change Classification | Confirm Change

The screenshot displays the 'Change Classification' screen. At the top, there are navigation tabs: LSIC, Reports, Notice, Search, Quote, and Main. The main area shows policy details for TAP9641770011, including the Travel Agency Name 'John Jacob Doe' and address '361 E. Hillsboro Blvd., Deerfield Beach, Broward, FL 33441'. A confirmation popup box is centered, asking 'Are you sure you want to change this policy?' with 'No' and 'Yes' buttons. The 'Yes' button is circled in red. Below the popup, there are sections for 'Credits', 'Distribution', 'Premium Change', and 'Locations'. The 'Change' button at the bottom is also circled in red.

1. Click on the **Change** button. A popup box displays.
2. Click on the **Yes** button. The effective date popup box displays again.
3. Click on the **OK** button. The CHANGED CLASSIFICATION popup box displays again.
4. Click on the **OK** button. The Underwriting screen displays.

The screenshot shows the navigation tabs at the top: LSIC, Reports, Coverages, Change, Quote, and Main Menu. The 'Change' and 'Main Menu' buttons are circled in red. Below the tabs, the policy details for TAP9641770011 are visible, including the Travel Agency Name 'John Jacob Doe' and address '361 E. Hillsboro Blvd., Deerfield Beach, Broward, FL 33441'.

- 5a. If the underwriter has made all necessary changes to the policy, click on the **Main** tab to exit.
- 5b. If the underwriter wishes to make additional changes to the policy, click on the **Change** tab.

This concludes the Change Classification portion of this tutorial.

Revision History

Revision History:

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