

# TUTORIAL: Change General Information In OnLine-PL

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# **CHANGE GENERAL INFORMATION IN ONLINE-PL TUTORIAL**



**SOP#:** \_\_\_\_\_ **Revision/Version:** 1.0  
**Effective Date:** 2013

**Prepared By:** Technical Writer Judy Thomas

**Approved By:** CEO Daniel O'Neal

**Title:** TUTORIAL: Change General Information In OnLine-PL

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

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

**Scope:** This tutorial covers processing changes to general information in OnLine-PL.

**Responsibilities:** Underwriters are responsible for processing changes to general information in OnLine-PL.

**Definitions:** The underwriter is responsible for processing changes to general information in OnLine-PL.

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

## System Requirements

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### **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

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### **Overview:**

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

**NOTE:** The screenshots in this tutorial demonstrate making changes to policy territories. The screens may differ slightly from those for other lines of business.

This document contains one main section:

- [I-Change General Information](#)

### **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
- TUTORIAL: Change Territories In OnLine-PL
- QUICK START: Change Groups In OnLine-PL
- TUTORIAL: Change Groups In OnLine-PL
- QUICK START: Change Credits In OnLine-PL
- TUTORIAL: Change Credits In OnLine-PL
- QUICK START: Change Addresses In OnLine-PL
- TUTORIAL: 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 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 GENERAL INFORMATION**

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### **PART I--CHANGE GENERAL INFORMATION**

This section illustrates how the underwriter makes changes to general information in OnLine-PL.

# 1. Change General Information | Apply Change

## Change General Information | Apply Change



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

A screenshot of the 'General' tabbed page. The 'General' tab is highlighted in yellow. Below it are sub-tabs: Practice Name, Billing Name, and Corporate Name. The main form contains the following fields and values:

First Name	Middle Name	Last Name	Suffix	Degree
John	Jacob	Doe		M. D.

Phone	Fax	Local Call	DOB	Lic. #	Policy #
333-333-3333	777-777-7777	<input type="radio"/> Yes <input type="radio"/> No	1/1/1980	11111	9141440

E-Mail/Web Username	Password	Specialty Text
physician@gmail.com		select from or add to list

Office Manager	Patient Ld	Weekly Ld	Bd Cert.	SSN/Tax ID
Office Contact	50	40	Yes	XXX-XX-XXXX

Change Agent	Notes
947 Demo Agency	

At the bottom of the form are two buttons: 'Exit' and 'Change'. The 'Change' button is highlighted with a red circle.

2. Type or click to select new information in an applicable field.

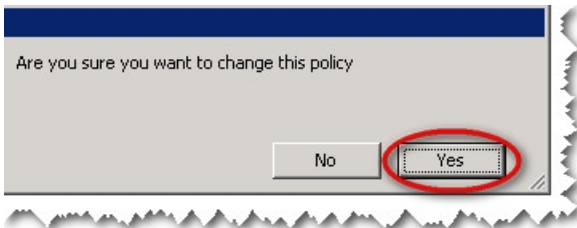
3. Repeat step 2 until all of the applicable information has been changed.

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

## 2. Change General Information | Confirm Change

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### Change General Information | 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 navigation bar 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 General Information portion of this tutorial.



# Revision History

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**Revision History:**

<b>Revision:</b>	<b>Date:</b>	<b>Requested By:</b>	<b>Description of Changes:</b>	<b>Signature</b>