TUTORIAL: Change General Information In OnLine-PL

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CHANGE GENERAL INFORMATION IN ONLINE-PL TUTORIAL

SOP#:________________ **Revision/Version:** 1.0
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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.

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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 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

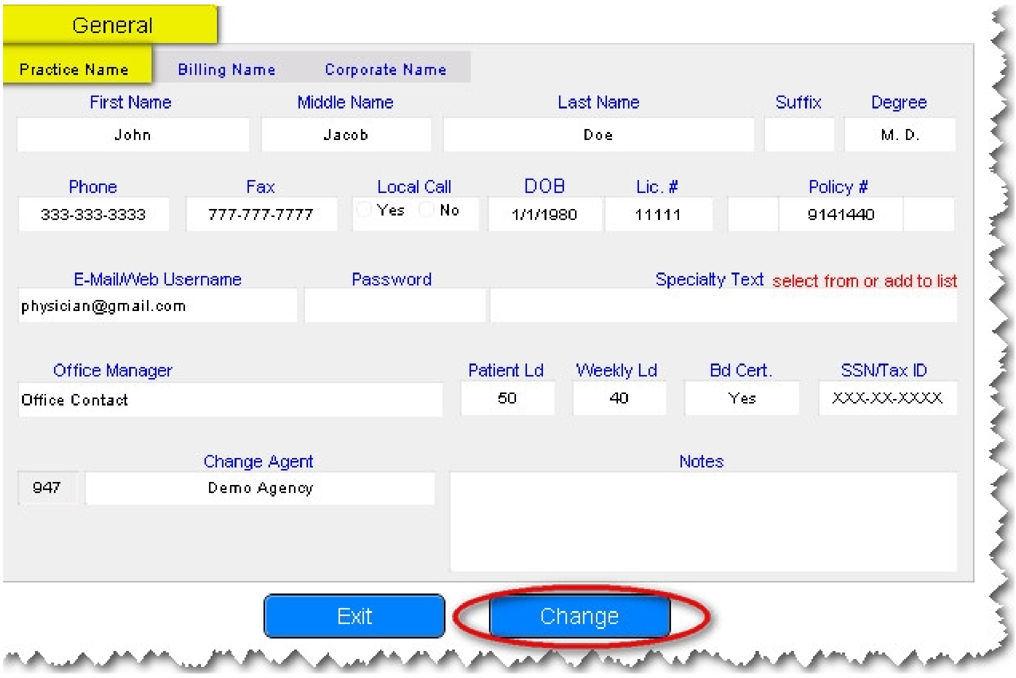
PART I--CHANGE GENERAL INFORMATION

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.



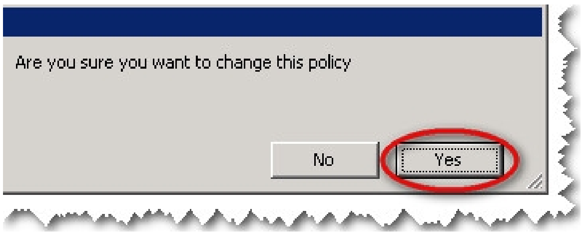
2. Type or click to select new information in an applicable field.

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

Change General Information | Confirm Change



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

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

Revision History:

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