

# TUTORIAL: Change Override In OnLine-PL

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# CHANGE OVERRIDE 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 Override In OnLine-PL

**Policy:** This tutorial serves as a standard operating procedure for changing overrides in OnLine-PL.

**Purpose:** To provide the underwriter with instructions for changing overrides in OnLine-PL.

**Scope:** This tutorial covers changing overrides in OnLine-PL.

**Responsibilities:** Underwriters are responsible for changing overrides in OnLine-PL.

**Definitions:** The underwriter is responsible for changing overrides in OnLine-PL.

**Overview:** This tutorial was created in 2013 to help underwriters change overrides 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 changing overrides in OnLine-PL. **NOTE:** The screenshots in this tutorial demonstrate changing overrides in travel E&O premiums. Screens may differ slightly for other lines of business.

This document contains one main section:

- [I-Change Override](#)

### **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 Policy Limits In OnLine-PL
- TUTORIAL: Change Policy Limits In OnLine-PL
- QUICK START: Change Policy Specialties In OnLine-PL
- TUTORIAL: Change Policy Specialties In OnLine-PL
- QUICK START: Change Policy Territories In OnLine-PL
- TUTORIAL: Change Policy Territories In OnLine-PL
- QUICK START: Change Policy Groups In OnLine-PL
- TUTORIAL: Change Policy Groups In OnLine-PL
- QUICK START: Change Policy Credits In OnLine-PL
- TUTORIAL: Change Policy Credits In OnLine-PL
- QUICK START: Change Policy Addresses In OnLine-PL
- TUTORIAL: Change Policy Addresses In OnLine-PL
- QUICK START: Change Policy Effective Dates In OnLine-PL
- TUTORIAL: Change Policy Effective Dates In OnLine-PL
- QUICK START: Change Policy Expiration Dates In OnLine-PL
- TUTORIAL: Change Policy Expiration Dates In OnLine-PL
- QUICK START: Change Policy Retro Dates In OnLine-PL
- TUTORIAL: Change Policy Retro Dates In OnLine-PL
- QUICK START: Change Policy General Information In OnLine-PL
- TUTORIAL: Change Policy General Information In OnLine-PL
- QUICK START: Change Policy Deductibles In OnLine-PL
- TUTORIAL: Change Policy Deductibles In OnLine-PL
- QUICK START: Change Override In OnLine-PL
- QUICK START: Change Policy Premium Endorsements In OnLine-PL
- TUTORIAL: Change Policy Premium Endorsements In OnLine-PL
- QUICK START: Change Policy Types In OnLine-PL
- TUTORIAL: Change Policy Types In OnLine-PL
- QUICK START: Change Policy State Funds In OnLine-PL
- TUTORIAL: Change Policy State Funds In OnLine-PL
- QUICK START: Change Policy Fees & Payments In OnLine-PL
- TUTORIAL: Change Policy Fees & Payments In OnLine-PL

## **PART I--CHANGE OVERRIDE**

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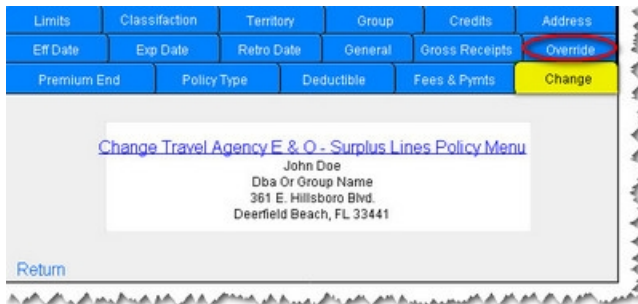
### **PART I--CHANGE OVERRIDE**

This section illustrates how the underwriter changes overrides in OnLine-PL.

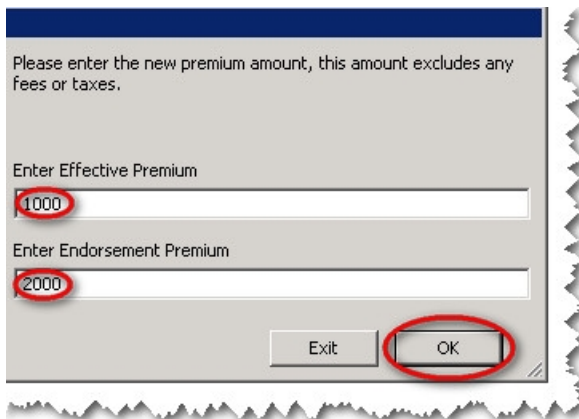
# 1. Change Override | Apply Change

## Change Override | Apply Change

### From the Change Menu:



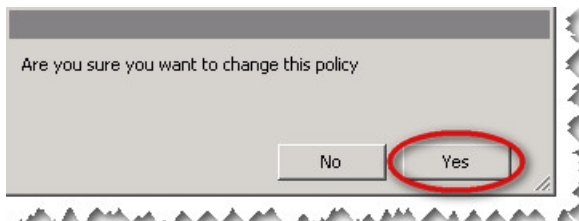
1. Click on the **Override** tab. A popup box displays.



2. Type the effective premium into the designated field.

3. Type the endorsement premium into the designated field, if applicable. **NOTE:** Not all policies or lines of business have endorsement premiums.

4. Click on the **OK** button. Another popup box displays.



5. Click on the **Yes** button. The Effective Date of Change popup box displays.

## 2. Change Override | Confirm Change

### Change Override | Confirm Change

Please enter the date you want the changes to become effective.  
The policy is effective from 11/1/2013 to 11/1/2014.

Effective Date of Change  
11/1/2013

OK

1. Type either the effective date of change or effective date of policy (MM/DD/YYYY) into the designated field.
2. Click on the **OK** button. The CHANGED OVERRIDE popup box displays.

CHANGED OVERRIDE

Effective date of change 11/1/2013

Annual Premium \$1,000.00  
Endorsement Premium \$2,000.00

OK

3. Click on the **OK** button. The Underwriting screen displays.

LSIC Reports Coverages **Change** Quote **Main Menu**

Policy TAP9641638011 Travel Agency Insured John Doe

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

Group/dba Name e-Mail/Username Password Office Manager  
Dba Or Group Name travel@gmail.com password Admin John Doe

General Report	Gross Receipts	Tax ID	Phone	Fax	Previous PN	Agent	Quote
	1,000,000		333-333-3333	777-777-7777		947	76452521

Chronological Events	Incep Date	Eff. Date	Exp. Date	Retro. Date	Limits	Classification	Agent
	11/01/2013	11/01/2013	11/01/2014		\$1,000,000/\$1,000,000	Retail Travel Agent	75102

Cert Holder	Deductible & Type	Caribbean & W Europe	Other	US and Canada	Middle East	
	Indemnity Only	2500	0%	0%	100%	0%

Credits	Distribution	Change
	Loss History	25%
	Control/Mgmt	0%
	Certifications	15%
	Training Programs	0%
	Industry Experience	10%
	Total	50%

**John Doe**  
Travel Agency E & O - Surplus Lines  
Occurrence  
Demo Agency  
Active  
Account Status

Pymt Plan	Billing	Locations
	Premium	\$812.00
	Endorsed Premium	\$0.00
	Taxes & Fees	\$54.40
	Total Carrier	\$866.40
	MGA Fees	\$25.00
	Credit Card & Other	\$0.00
	Premium Paid	\$0.00
	Account Balance	\$891.40

Search Find View Agent Renew History Cancel Print Documents

- 3a. If the underwriter has made all necessary changes to the policy, click on the **Main Menu** tab to exit.
- 3b. If the underwriter wishes to make additional changes to the policy, click on the **Change** tab.

This concludes the Change Override 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>