TUTORIAL: Change Specialty In OnLine-PL

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CHANGE SPECIALTY IN ONLINE-PL TUTORIAL

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Title: TUTORIAL: Change Specialty In OnLine-PL

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

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

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

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

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

Overview: This tutorial was created in 2013 to help underwriters process changes to specialties 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 specialties in OnLine-PL.
NOTE: The screenshots in this tutorial demonstrate making changes to physician policy limits. Screens may differ slightly for other lines of business.

This document contains one main section:

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 Specialty 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 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 and Payments In OnLine-PL
- TUTORIAL: Change Fees and Payments In OnLine-PL
- QUICK START: Cancel Policy In OnLine-PL
- TUTORIAL: Cancel Policy In OnLine-PL

PART I--CHANGE SPECIALTY

PART I--CHANGE SPECIALTY

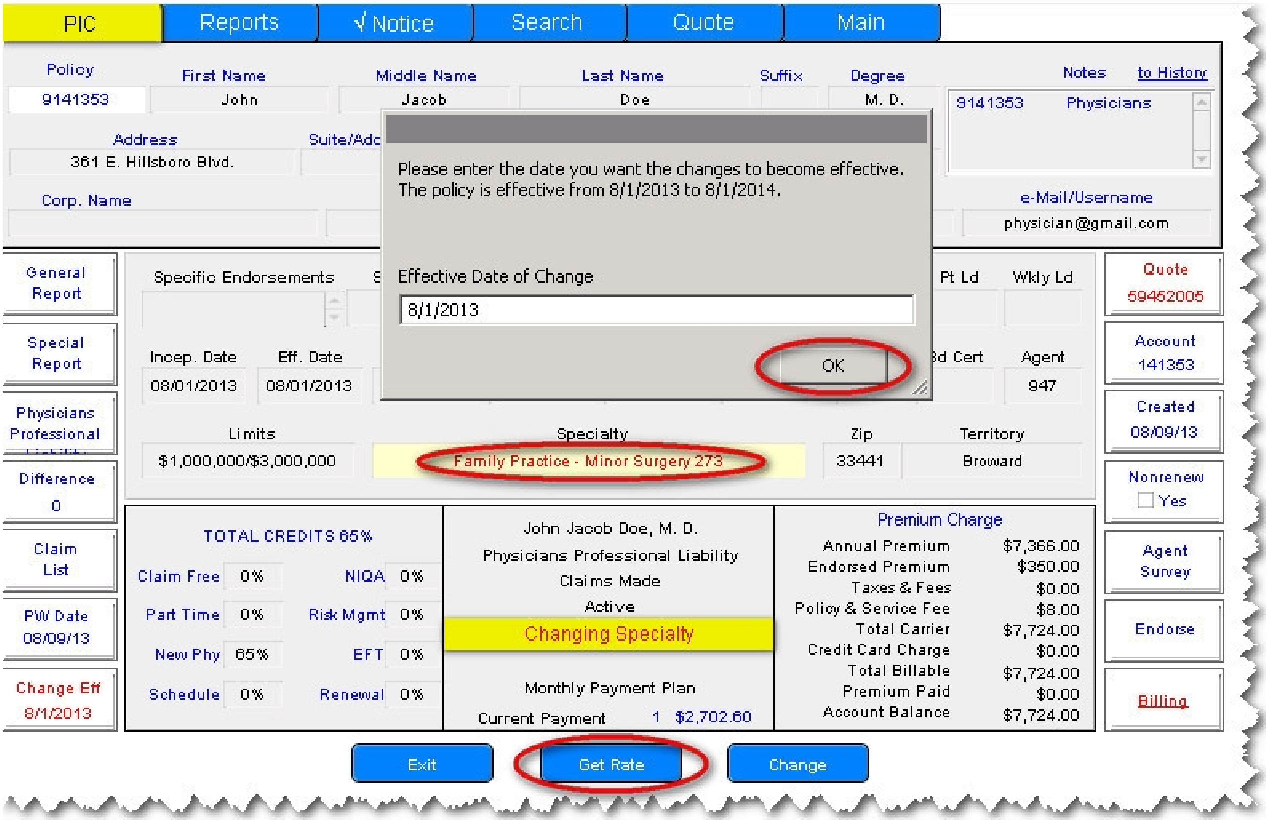
This section illustrates how the underwriter gets new rates for and makes changes to a specialty in OnLine-PL.

1. Change Specialty | Get Rate

Change Specialty | Get Rate

From the Change Menu:

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



2. Click to select a new specialty from the Specialty dropdown menu.

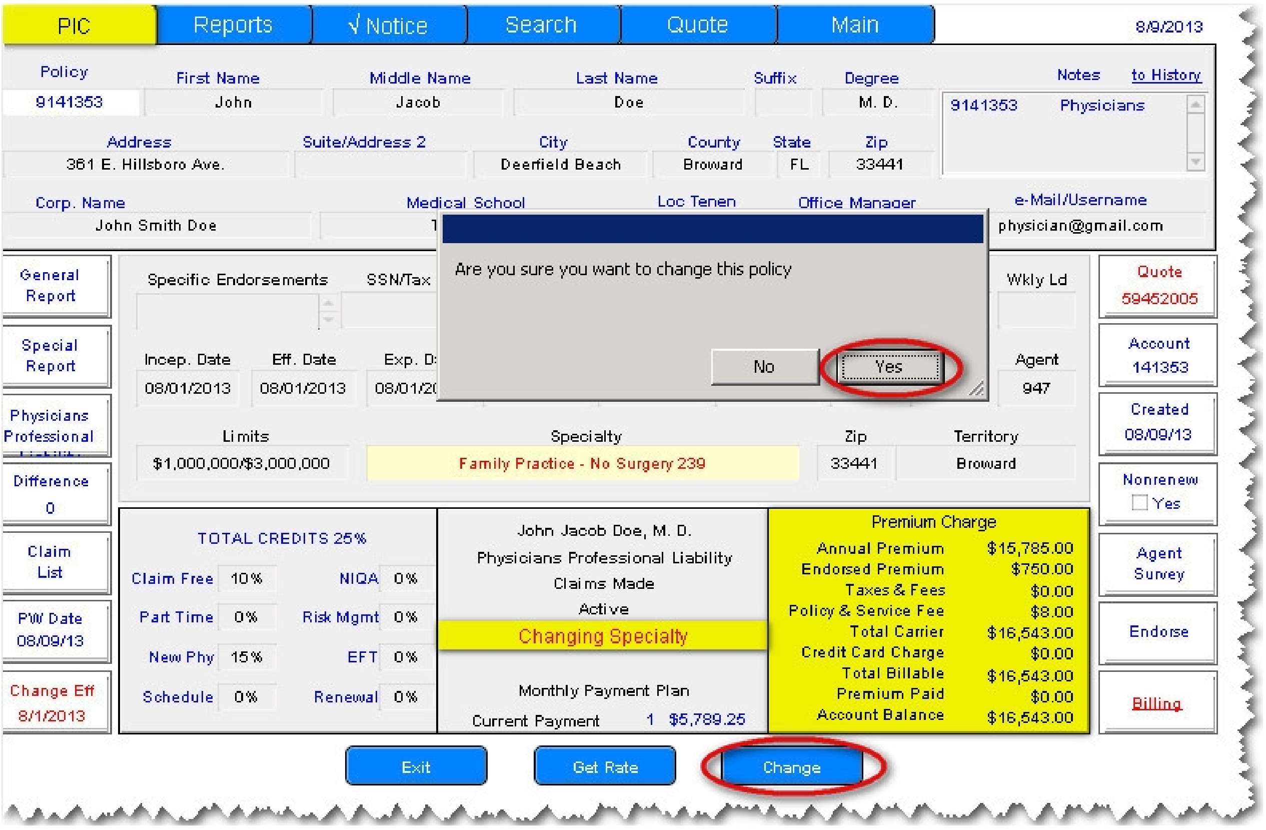
3. Click on the **Get Rate** button. The effective date of change popup box displays.

4. Click on the **OK** button. The CHANGED SPECIALTY popup box displays.

5. Click on the **OK** button.

2. Change Specialty | Confirm Change

Change Specialty | Confirm Change



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

2. Click on the **Yes** button. The effective date of change popup box displays again.

3. Click on the **OK** button. The CHANGED SPECIALTY popup box displays again.

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

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 Specialty portion of this tutorial.

Revision History

Revision History:

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