

TUTORIAL: Change Specialty In OnLine-PL

Table of contents

STANDARD OPERATING PROCEDURE (SOP) DETAILS	3
System Requirements	4
Overview	5
PART I--CHANGE SPECIALTY	6
1. Change Specialty Get Rate	7
2. Change Specialty Confirm Change	8
Revision History	9

CHANGE SPECIALTY 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 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:

- [I-Change Specialty](#)

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.

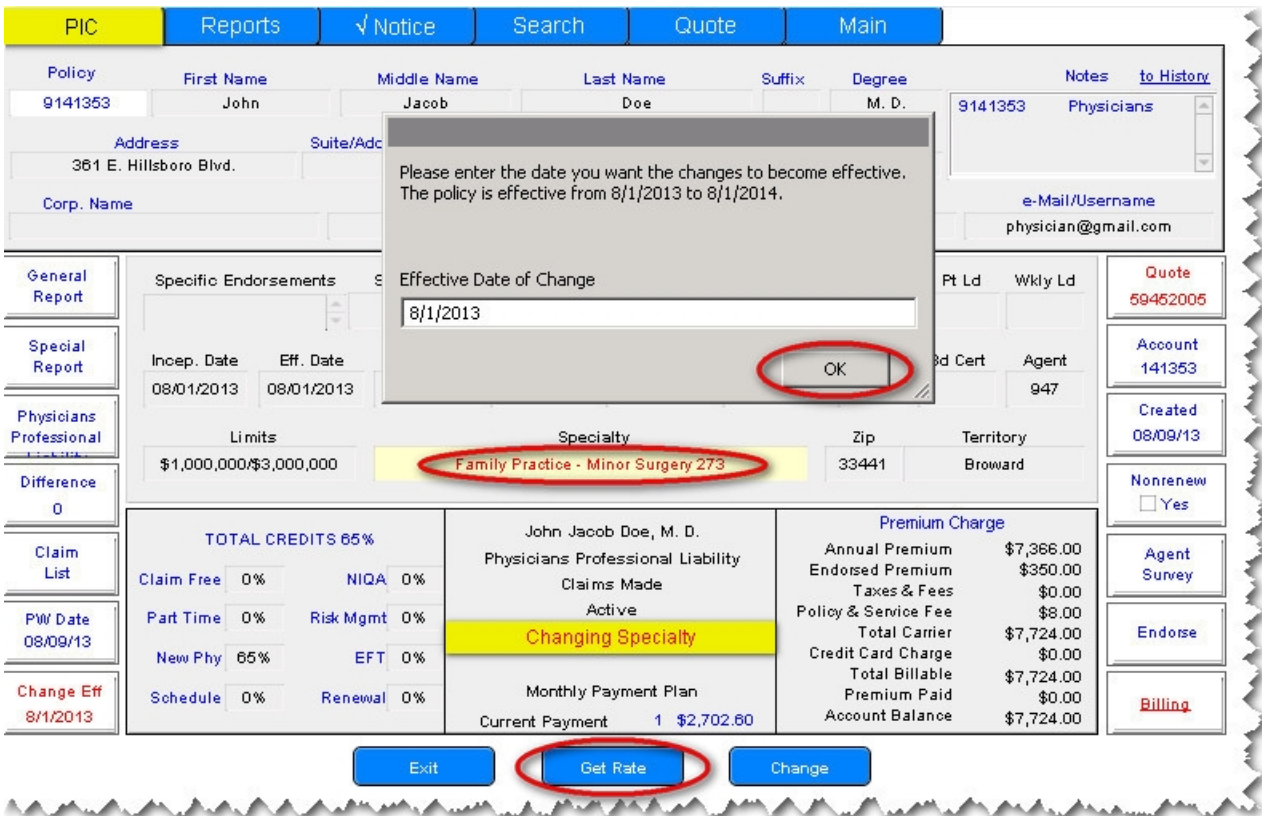
1. Change Specialty | Get Rate

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

The screenshot shows a software interface for managing a policy. The top navigation bar includes tabs for PIC, Reports, Notice, Search, Quote, and Main. The main area displays a form for policy details, including fields for Policy, First Name, Middle Name, Last Name, Suffix, Degree, Address, City, County, State, Zip, Corp. Name, Medical School, Loc Tenen, Office Manager, and e-Mail/Username. A confirmation dialog box is open, asking "Are you sure you want to change this policy" with "No" and "Yes" buttons. The "Yes" button is highlighted with a red circle. Below the dialog box, there is a table for Premium Charge and a "Change" button at the bottom, also highlighted with a red circle.

Annual Premium	\$15,785.00
Endorsed Premium	\$750.00
Taxes & Fees	\$0.00
Policy & Service Fee	\$8.00
Total Carrier	\$16,543.00
Credit Card Charge	\$0.00
Total Billable	\$16,543.00
Premium Paid	\$0.00
Account Balance	\$16,543.00

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.

The screenshot shows the software interface with the 'Change' and 'Main' tabs highlighted with red circles. The form below the tabs shows the same policy details as the previous screenshot, including fields for Master Account, First Name, Middle Name, Last Name, Suffix, Degree, Address, City, County, State, Zip, Corp. Name, Medical School, Loc Tenen, and Office Manager.

- 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