





Agent/Broker Portal

User Guide



[My Account](#) | [Contact Us](#) | [Report a Claim](#) | 

[Policy Search](#) | [Policies](#) | [Quotes and Applications](#) | [All Documents](#) | [Tools and Publications](#)

TEST Professional, LLC

POLICY SEARCH

GO ▶

Read the latest [Agent/Broker Portal](#) updates.

TDC Group Feature: Medical Advantage

Learn about the unique services this business unit of the TDC Group of companies (TDC Group) has to offer and how [agents are now able to receive commission](#) for referring Medical Advantage's services to their clients.

Need training for this site? [Sign up now.](#)

News

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- [Financial Results](#)
- [Dividend Information](#)
- [Marketing and Sales Support](#)
- [Applications and Forms](#)
- [Key Agency Program](#)
- [Marketing Publications](#)
- [MPL Policy Resources](#)
- [Promotional Merchandise](#)
- [The Tribute Plan](#)

[SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS](#)

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Table of Contents:

Introduction 2

Register Account..... 3

Sign In..... 5

Landing Page..... 6

All Documents and E-Doc Email 7

Policy List..... 8

Payments Due (Advanced Notice of Payment Due) 9

Cancelled Policies (Advanced Notice of Cancellation for Non-Pay).....10

All Documents10

Policy Search11

Policy Drop-Down Resources.....12

Policy Billing Drop-Down Resources13

Documents Drop-Down Resources15

Make a Payment18

Enroll in AutoPAY.....20

Quotes and Applications22

Tools and Publications23

Report a Claim - Report a Claim24

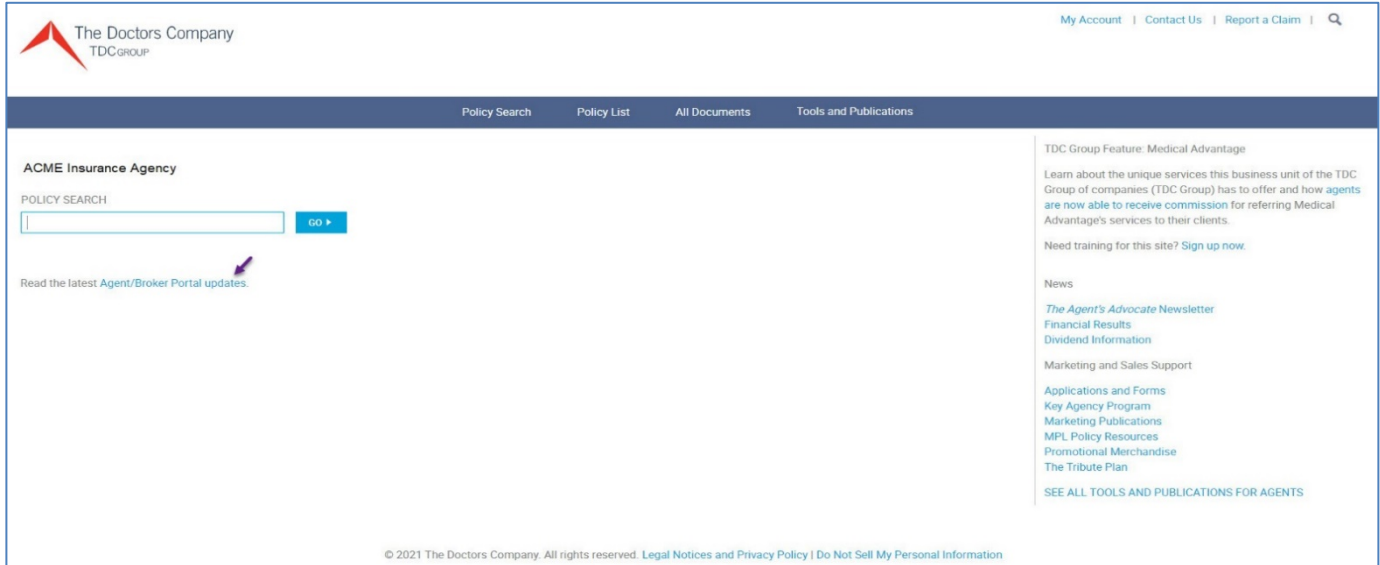
Agency Support Assistance24

Introduction

The Doctors Company is committed to helping you service your clients and manage your agency efficiently. We are in the process of upgrading our technology platform and making security and feature enhancements to the Agent/Broker Portal. Doing so helps position The Doctors Company for the expansion and efficient integration of future business processes and technology innovations.

Agent/Broker Portal Updates

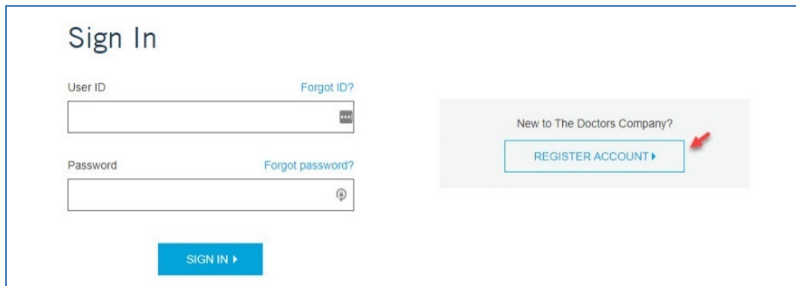
To keep informed of newly installed Agent/Broker Portal features and future enhancements, click **Agent/Broker Portal updates**.



The screenshot shows the ACME Insurance Agency portal homepage. At the top left is the logo for The Doctors Company TDC GROUP. To the right are links for My Account, Contact Us, and Report a Claim, along with a search icon. Below the logo is a navigation bar with links for Policy Search, Policy List, All Documents, and Tools and Publications. The main content area is titled "ACME Insurance Agency" and features a "POLICY SEARCH" section with a text input field and a "GO" button. Below this is a link "Read the latest Agent/Broker Portal updates." with a purple arrow pointing to it. On the right side, there is a sidebar with various links and information, including "TDC Group Feature: Medical Advantage", "News", "The Agent's Advocate Newsletter", "Financial Results", "Dividend Information", "Marketing and Sales Support", "Applications and Forms", "Key Agency Program", "Marketing Publications", "MPL Policy Resources", "Promotional Merchandise", "The Tribute Plan", and "SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS". At the bottom of the page is a copyright notice: "© 2021 The Doctors Company. All rights reserved. Legal Notices and Privacy Policy | Do Not Sell My Personal Information".

Register Account

If you do not have an activated user ID and password, click **Register Account**.



The screenshot shows the "Sign In" page. It features two input fields: "User ID" and "Password". Each field has a "Forgot ID?" or "Forgot password?" link next to it. Below the input fields is a "SIGN IN" button. To the right of the input fields is a box with the text "New to The Doctors Company?" and a "REGISTER ACCOUNT" button with a red arrow pointing to it.

Click **I am an agent or broker** and fill in the details about yourself and your agency.

Register Your Online Member Account

Please provide the following to begin:

Email address

Already have an account?

Not a member?
Other online account options:

[I am an agent or broker](#) ←

[I am authorized to act on a member's behalf](#)

[I need a member's credentialing reports or other documents](#)

Personal Details

First name

Last name

Agency name

Agency number (optional)

Agency Role
 Agent/broker Support Staff

Phone

Are you registering as a Chubb Dental Program participant?
 Yes No

Email Address

 ←

Verification code has been sent. Please copy it to the input box below.

Email Address

Verification code

[Send new code](#)

Regarding the question “*Are you registering as a Chubb Dental Program participant?*”

Are you registering as a Chubb Dental Program participant?
 Yes No

Chubb Web Login ID

You will then send a verification code to the email address by pressing **Send Verification Code**. Input the verification code and click **Verify Code**.

Note: If you have problems with the code provided, click **Send new code**.

You see the *Register for an Account* screen:

Register for an Account

User ID

Create password

Confirm password

Select a security question

Your answer

I certify that I have read and agree to the [Terms of Use](#).

NEXT ▶

Note: Your email address may appear as your user ID. Your password must be a minimum of eight characters and include at least one capitalized letter, at least one number, and at least one special symbol.

Click **Terms of Use** to read through the terms, and then click the **I certify that I have read and agree to the Terms of Use** checkbox. Click **Next**.

Agency Support will process the online account request. Once processed, an email will be sent to you notifying you that your account access has been activated.

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Verification In Progress

You have successfully completed the registration process and we will verify your information.

Once your information is verified, we will notify you by e-mail that your account has been activated. The verification process typically takes up to two business days. If you need access to your account sooner, please contact Agency Support at [\(800\) 421-2368](tel:8004212368), or agencysupport@thedoctors.com for assistance.

In the meantime, we invite you to explore the main resources available at www.thedoctors.com.

Sign In

Access thedoctors.com and click **Sign In**.

The Doctors Company
TDCGROUP

GET A QUOTE ▶

Sign In | Contact Us | Report a Claim | 🔍

User ID Retrieval

Retrieve User ID

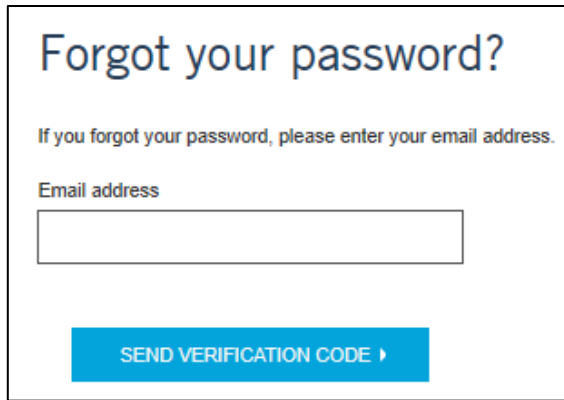
If you forgot your User ID, please enter your email address.

Email address

SUBMIT ▶

Password Retrieval

To retrieve a forgotten password, click **Forgot Password**, and a verification code will be emailed to you. Use the verification code and link provided in the email to reset your password.



The screenshot shows a web form titled "Forgot your password?". Below the title is the instruction: "If you forgot your password, please enter your email address." There is a text input field labeled "Email address". At the bottom of the form is a blue button with the text "SEND VERIFICATION CODE" and a right-pointing arrow.

Landing Page

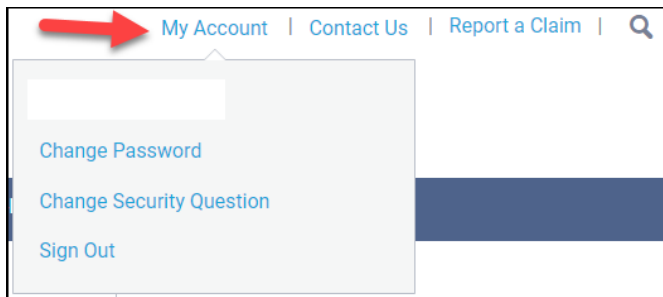
Once you sign in, you see the *Landing Page*.

Note: To return to the *Landing Page* from other Agent/Broker Portal screens (Web pages) click **The Doctors Company/TDC Group logo** in the upper-left corner of the screen.



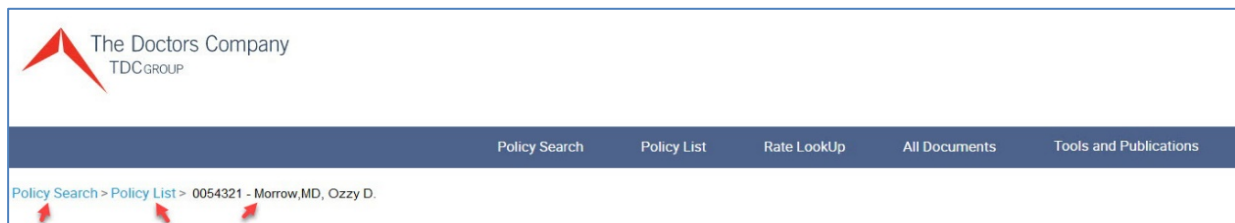
My Account

Within **My Account**, you can change your password, security questions, and sign out of the account. In some accounts, you can also view commission statements through the Agency Self-Service link.



Breadcrumb Trail

The breadcrumb trail shows you the screen selection path taken. You can click any segment of the breadcrumb trail to return to a specific screen.



All Documents and E-Doc Email

When you receive The Doctor Company's e-doc email, and then click **View Documents** (from the email), you see the Agent/Broker Portal's *Sign In* screen. Once signed in, you see the *All Documents* screen and the policy document(s) referenced by the e-doc email.

Policy Search Policies ▾ Rate LookUp All Documents Tools and Publications

All Documents

Search:

Search by Policy Number, Policy Name, or Document Name.

Show these document types:

Policy Billing Tribute Additional

From: 11/19/2021 To: 11/19/2021

GO ▶

<input type="checkbox"/>	Name	Policy Name	Policy	Delivery Date
<input checked="" type="checkbox"/>	Offer of Insurance	MOLLY MALLARD	2640704	11/19/2021

Page 1 of 1 Per Page Options 25

DOWNLOAD SELECTED ▶

Note: The date range defaults to show all policy documents delivered today and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.

You can click the document name to save and open as a PDF. Or click the document checkbox and click **DOWNLOAD SELECTED** to save as a *.ZIP file [(which you can later open to see the individual *.PDF file(s))].

New Policy 2751312 02/10/2023

- Mail Page
- Certificate of Insurance
- Declarations Page
- Declarations Page Schedule of Insureds
- Claims-Made Professional Liability Insurance Policy
- Business Associate Agreement
- California Changes Endorsement
- CyberGuard/MediGuard Endorsement
- Known Claim Exclusion Endorsement

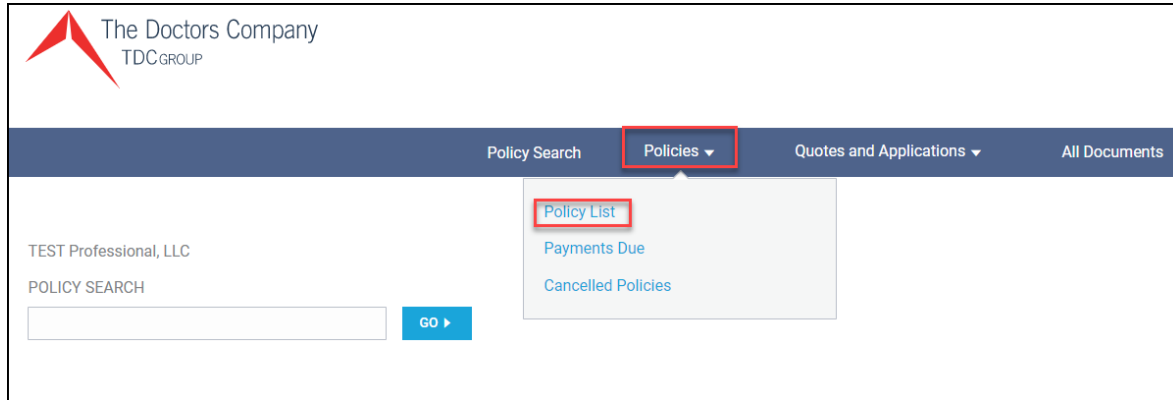
Tribute 2751312 02/10/2023

Page 1 of 1 Per Page Options 25

DOWNLOAD SELECTED ▶

Policy List

Click **Policies > Policy List** to see a list of all policies associated with your agency.



You will see a list of all policies linked to your portal.

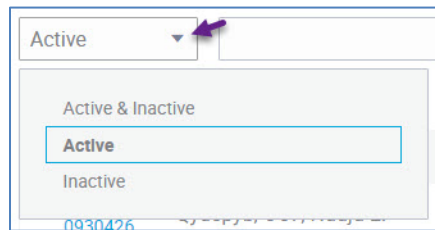
Policy List

Your search can only return 1000 results. Please narrow your search.

Active

Policy #	Name	Address	City	State	ZIP	Effective Date	Status
0012345	Cotati Medical Group PA	123 Main Street	Cotati	CA	94928	07/01/2021	Active
0054321	Morrow, MD, Ozzy D.	326 Mainsail Drive	Rohnert Park	CA	94928	07/01/2021	Active

The Policy List defaults to **Active** policies. Click the triangle to change the policy list display to show: **Active & Inactive**, **Active** (default value), or **Inactive**:



Within the **Search** field, you can search by policy or member name.

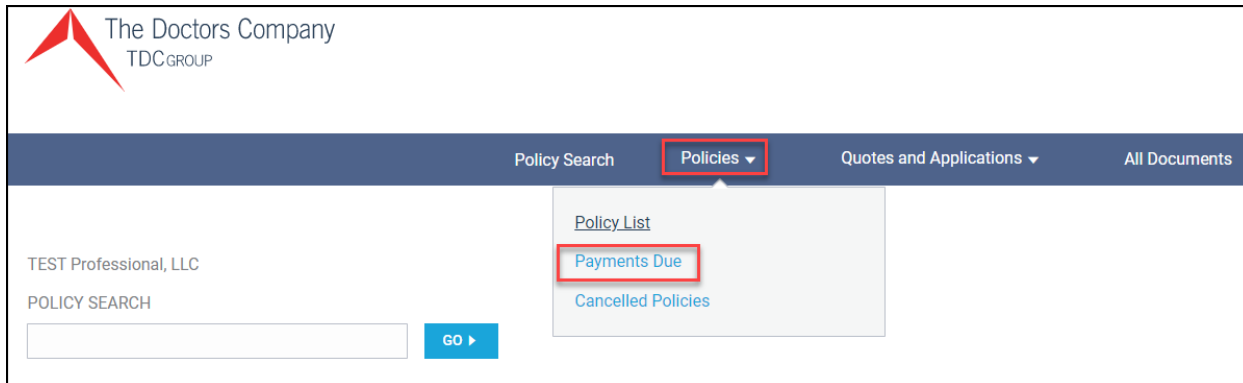
Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook File.

At the bottom of the page, you can move to the next page by pressing **>**. You can move to the last page by pressing **>|**. On the right side using the dropdown, you can change the number of records viewed per page by 25, 50, and 100.

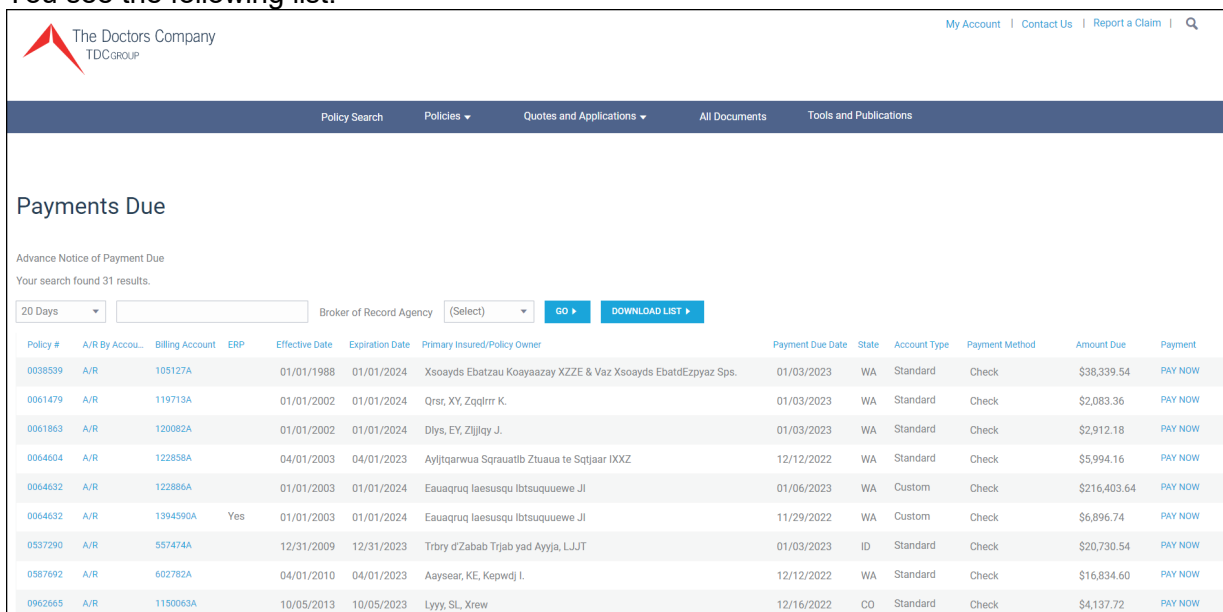


Payments Due (Advanced Notice of Payment Due)

Click **Policies > Payments Due** to see the **Advance Notice of Payment Due** list that helps you to track policies that have payments due. The Payments Due list includes payments due in 5-, 10-, and 20-days and the expected payment method.



You see the following list:



Policy #	A/R By Account	Billing Account	ERP	Effective Date	Expiration Date	Primary Insured/Policy Owner	Payment Due Date	State	Account Type	Payment Method	Amount Due	Payment
0038539	A/R	105127A		01/01/1988	01/01/2024	Xsoayds Ebatzau Koayaazay XZZE & Vaz Xsoayds EbatdEzpyaz Sps.	01/03/2023	WA	Standard	Check	\$38,339.54	PAY NOW
0061479	A/R	119713A		01/01/2002	01/01/2024	Qrsr, XY, Zqqr K.	01/03/2023	WA	Standard	Check	\$2,083.36	PAY NOW
0061863	A/R	120082A		01/01/2002	01/01/2024	Dlys, EY, Zjllqy J.	01/03/2023	WA	Standard	Check	\$2,912.18	PAY NOW
0064604	A/R	122858A		04/01/2003	04/01/2023	Aylitqanwua Sqrauatb Ztuaua te Sqttjaar IXXZ	12/12/2022	WA	Standard	Check	\$5,994.16	PAY NOW
0064632	A/R	122886A		01/01/2003	01/01/2024	Eauaqrnuq laesusqu lbttsuqueweue JI	01/06/2023	WA	Custom	Check	\$216,403.64	PAY NOW
0064632	A/R	1394590A	Yes	01/01/2003	01/01/2024	Eauaqrnuq laesusqu lbttsuqueweue JI	11/29/2022	WA	Custom	Check	\$6,896.74	PAY NOW
0537290	A/R	557474A		12/31/2009	12/31/2023	Trbry d'Zabab Trjab yad Ayyja, LJJT	01/03/2023	ID	Standard	Check	\$20,730.54	PAY NOW
0587692	A/R	602782A		04/01/2010	04/01/2023	Aaysear, KE, Kepwdj I.	12/12/2022	WA	Standard	Check	\$16,834.60	PAY NOW
0962665	A/R	1150063A		10/05/2013	10/05/2023	Lyyy, SL, Xrew	12/16/2022	CO	Standard	Check	\$4,137.72	PAY NOW

Within the **Search** field, you can search by policy or member name.

Within the **Broker of Record Agency** dropdown, you can select a certain book of business code to sort policies.

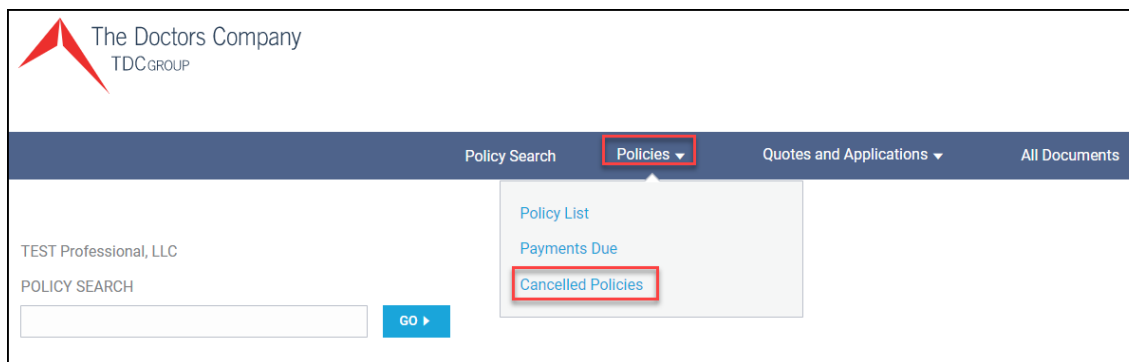
Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook file.

Each column header within the search results is sortable. You can click each column header to sort from A-Z, Z-A, Oldest to newest, and newest to oldest.

On the last column to the right, you will see the **Pay Now** prompt, which you can click to process e-check or credit card payment on your client's behalf. Otherwise, a payment can be made by contacting Member Services.

Cancelled Policies (Advanced Notice of Cancellation for Non-Pay)

Click **Policies > Cancelled Policies** to see **Advanced Notice of Cancellation for Non-Pay** list that helps you to track policies that could be canceled for non-payment. This online list includes 5- and 10-day advance notice of cancellation effective dates and cancellation process dates.



You see the following list:

The screenshot shows the 'Cancelled Policies' search results page. It features a search bar with '10 Days' selected, a 'Broker of Record Agency' dropdown, and 'GO' and 'DOWNLOAD LIST' buttons. Below the search bar is a table with the following data:

Policy #	A/R By Account	Billing Account	Effective Date	Expiration Date	Primary Insured/Policy Owner	Cancel Eff Date	Cancel Process Date	State	Account Type	Payment Method	Payment
0068376	A/R	196165A	09/30/2004	09/30/2022	Singh, MD, Joscelyn P.	09/29/2021	09/29/2021	FL	Standard	Credit Card Auto P...	PAY NOW

Within the **Search field**, you can search by policy or member name.

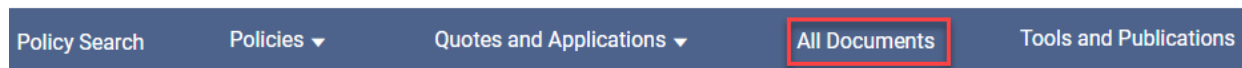
Within the **Broker of Record Agency** drop down, you can select a certain book of business code to sort policies.

Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook File.

Each column header within the search results is sortable. You can click each column header to sort from A–Z, Z–A, oldest to newest, and newest to oldest.

All Documents

To see all documents delivered today, or any date range you enter, click **All Documents**.



You see the *All Documents* screen.

All Documents

Search:

Search by Policy Number, Policy Name, or Document Name.

Show these document types:

Policy Billing Tribute Additional

From: To:

GO ▶

<input type="checkbox"/>	Name	Policy Name	Policy	Delivery Date
<input checked="" type="checkbox"/>	Offer of Insurance	MOLLY MALLARD	2640704	11/19/2021

Page 1 of 1 Per Page Options 25

DOWNLOAD SELECTED ▶

Note: The date range defaults to show all policy documents delivered today and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.

You can click the document name to save the file and open as a PDF. Or click the document checkbox and click **DOWNLOAD SELECTED** to save as a *.ZIP file [which you can later open to see the individual *.PDF file(s)].

New Policy 2751312 02/10/2023

- Mail Page
- Certificate of Insurance
- Declarations Page
- Declarations Page Schedule of Insureds
- Claims-Made Professional Liability Insurance Policy
- Business Associate Agreement
- California Changes Endorsement
- CyberGuard/MediGuard Endorsement
- Known Claim Exclusion Endorsement

Tribute 2751312 02/10/2023

Page 1 of 1 Per Page Options 25

DOWNLOAD SELECTED ▶

Policy Search

To find a specific policy, click **Policy Search**. You see the *Policy Search* screen.

Policy Search Policies ▾ Quotes and Applications ▾ All Documents Tools and Publications

POLICY SEARCH

Enter the policy number or name in the **POLICY SEARCH** field and click **GO**. You will see the search results.

Policy List

Your search found 1 results.

Active & Inactive

Policy #	Name	Address	City	State	ZIP	Effective Date	Status
0054321	Morrow, MD, Ozyy D.	325 Mansail Drive	Cotati	CA	94928	07/01/2020	Active

Click the policy number to see the *Policy Summary* screen.

Policy Drop-Down Resources

Below the policy name, you will see the **Policy**, **Billing**, and **Documents** policy-specific resources.

Watts, MD, Todd P.

[POLICY ▼](#) [BILLING ▼](#) [DOCUMENTS ▼](#)

Below the **Policy**, **Billing**, and **Documents** menu, you will see the Policy Summary screen. Click **MORE** to view more information.


Policy Search > Policy List > 0064601 - Watts, MD, Todd P.

Watts, MD, Todd P.

[POLICY ▼](#) [BILLING ▼](#) [DOCUMENTS ▼](#)

Policy Summary

Policy #	0064601	Primary Practice	122 1st St. Napa, CA 94558
Edition	<input type="text" value="04/01/2022 - 04/01/2023"/>		
Status	Inforce	Practice Phone	(509) 489-2851
Reporting Type	Claims Made and Reported	Email	IT-APPDEV-DEV_QANotifications@thedoctors.com
Transaction Effective Date	04/01/2022	Bill To	Watts, MD, Todd P. 122 1st St. Napa, CA 94558
Underwriter	Linda M. Manning IT-APPDEV-DEV_QANotifications@thedoctors.com (971) 223-6356	Carrier	The Doctors Company

 [MORE >](#)

To return to the default policy summary screen view, click **LESS**.

Policy Type	Healthcare Professional	Entity Coverage	
Account Type	Standard Service	Line Of Business	Medical Professional Liability
Pre-Paid ERP	No	Policy Form	MPL (04/15)
Broker of Record	400 - ACME Insurance Agency	Commission	10.00%
Servicing Agent	400 - ACME Insurance Agency		

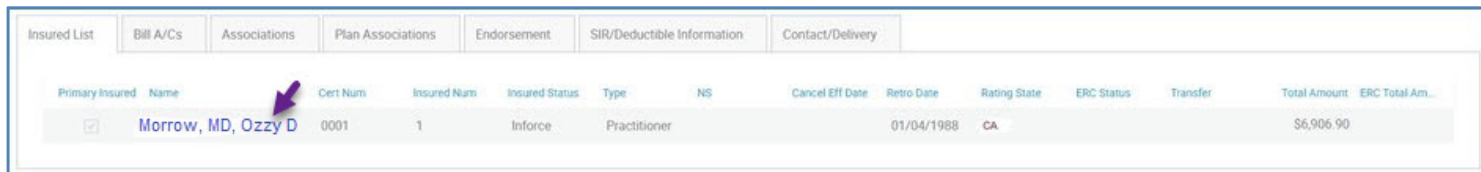
Policy Tab Resources

After selecting a policy, you will also see the following tabs when you scroll to the bottom of the *Policy Summary* screen. Click each tab to view the information listed.

[Insured List](#) [Bill A/Cs](#) [ERC Insureds](#) [Associations](#) [Plan Associations](#) [Endorsement](#) [SIR/Deductible Information](#) [Contact/Delivery](#)

Insured Detail

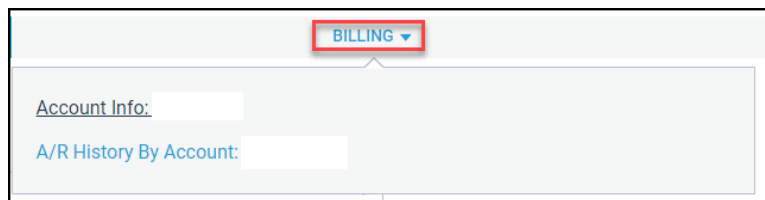
Within a policy, you can view the details for each insured in the **Insured List**. Click on the insured member's name to see the *Insured Detail* information.



Primary Insured	Name	Cert Num	Insured Num	Insured Status	Type	NS	Cancel Eff Date	Retro Date	Rating State	ERC Status	Transfer	Total Amount	ERC Total Am...
<input checked="" type="checkbox"/>	Morrow, MD, Ozzy D	0001	1	Inforce	Practitioner			01/04/1988	CA			\$6,906.90	

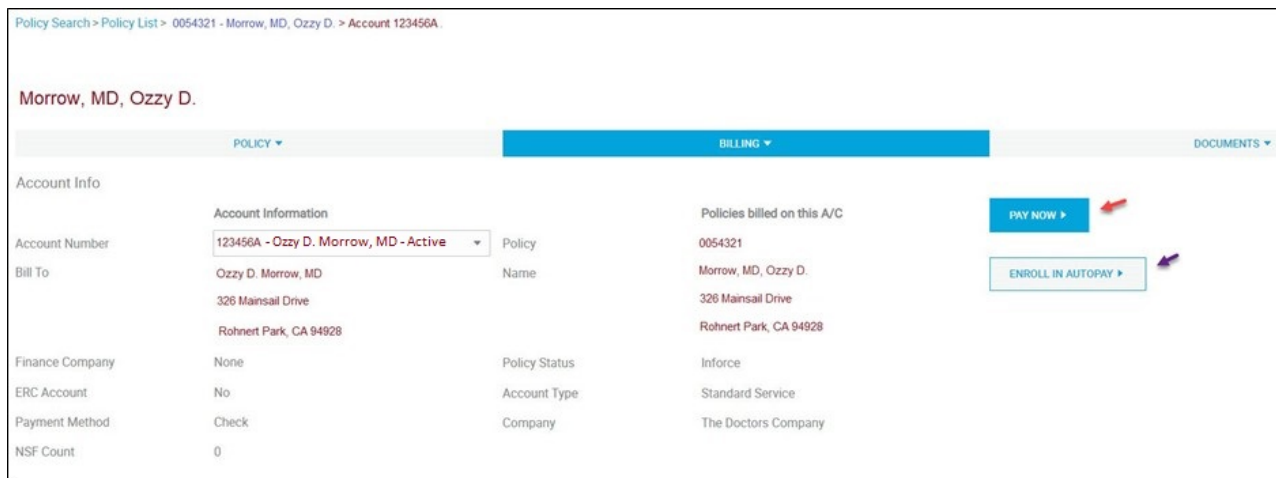
Policy Billing Drop-Down Resources

The Billing drop-down resource has the following menu options:



Account Info

Click **Billing > Account Info** to see the *Account Info* screen.



Policy Search > Policy List > 0054321 - Morrow, MD, Ozzy D. > Account 123456A.

Morrow, MD, Ozzy D.

POLICY BILLING DOCUMENTS

Account Info

Account Information	Policies billed on this A/C
Account Number: 123456A - Ozzy D. Morrow, MD - Active	0054321
Bill To: Ozzy D. Morrow, MD 326 Mainsail Drive Rohnert Park, CA 94928	Name: Morrow, MD, Ozzy D. 326 Mainsail Drive Rohnert Park, CA 94928
Finance Company: None	Policy Status: Inforce
ERC Account: No	Account Type: Standard Service
Payment Method: Check	Company: The Doctors Company
NSF Count: 0	

PAY NOW

ENROLL IN AUTOPAY

Within this area, you can:

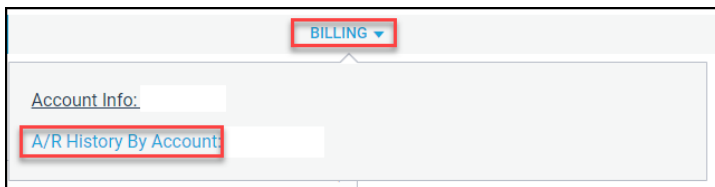
- Click **PAY NOW** to process a payment on behalf on your client (using the client's credit card or checking account information, or
- Click **ENROLL IN AUTOPAY** to set up recurring payments for your client (using the client's credit card or checking account information).

Scrolling to the bottom of the page, you will be able to see line-by-line accounting based on the debits and credits of the billing account. You can filter by selecting either **Activity Date**, **Start Date**, and **End Date**, then pressing **GO**.

Filter By	Activity Date	Start Date	2/15/2022	End Date	2/15/2023	Go ▶					
Activity Date	Effective Date	Description	Premium	Dividend	PCF	Tax And Surcharge	Credits And Fees	Total	Cash	Total Outstanding	Billed Amount
1/4/2023	1/6/2023	Apply Suspende e-check EC 2633	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,189.88	\$24,502.26	\$0.00
1/4/2023	1/1/2023	Written Premium Reinstatement	\$33,692.14	\$0.00	\$0.00	\$0.00	\$0.00	\$33,692.14	\$0.00	\$33,692.14	\$0.00
1/3/2023	1/1/2023	Written Premium Cancel	\$-33,692.14	\$0.00	\$0.00	\$0.00	\$0.00	\$-33,692.14	\$0.00	\$0.00	\$0.00
12/8/2022	1/1/2023	Written Premium Mid-Term Change	\$-3,577.93	\$0.00	\$0.00	\$0.00	\$0.00	\$-3,577.93	\$0.00	\$33,692.14	\$0.00
11/15/2022	1/1/2023	Written Premium Renewal	\$37,270.07	\$0.00	\$0.00	\$0.00	\$0.00	\$37,270.07	\$0.00	\$37,270.07	\$0.00
11/15/2022	11/15/2022	Annual Premium Statement Renewal 44486038-00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$37,270.07
6/27/2022	6/27/2022	Process Payment Check 208503	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,927.69	\$0.00	\$0.00
6/14/2022	6/16/2022	Process Payment e-check EC 4579	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,927.69	\$8,927.69	\$0.00
5/16/2022	5/16/2022	Premium Installment 444743582-00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17,855.38	\$8,927.69
3/16/2022	3/18/2022	Process Payment e-check EC 4579	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,830.64	\$17,855.38	\$0.00
		Starting Balance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$158,983.28	\$132,297.26	\$26,686.02	\$0.00
								Total:	\$192,675.42	\$168,173.16	

A/R History by Account

Click **Billing > A/R History by Account** to see the *A/R History by Account* screen.



The example shows the recent A/R history for this policy sorted by **Activity Date**.

Policy Search > Policy List > 0054321 - Morrow, MD, Ozzy D. > Account 123456A

Morrow, MD, Ozzy D.

POLICY BILLING DOCUMENTS

A/R History By Account

Account Information		A/R Summary	
Account Number	123456A - Ozzy D. Morrow, MD - Active	Suspense Amt	\$0.00
Bill To	Ozzy D. Morrow, MD 326 Mansal Drive Rohnet Park, CA 94928	Outstanding Balance Current Amt	\$6,324.62
ERC Account	No	Outstanding Balance Prior Term	\$0.00
Policy Status	Inforce	Cash Applied To Current Term	\$18,767.62
		Current Billed Amt Due	\$6,324.62
		Pending Refund	\$0.00

Filter By: Activity Date Start Date: 5/18/2020 End Date: 5/18/2021 Go ▶

Activity Date	Effective Date	Description	Premium	Dividend	PCF	Tax And Surcharge	Credits And Fees	Total	Cash	Total Outstanding	Billed Amount
5/17/2021	5/17/2021	Premium Installment 444483545-00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,324.62	\$6,324.62
3/15/2021	3/16/2021	Process Payment Discover D1 3885	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,255.86	\$6,324.62	\$0.00

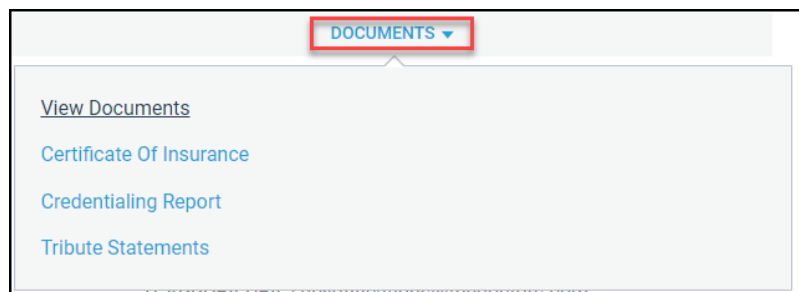
Policies that begin with “26” have transitioned to our new policy platform and present a simplified *A/R History by Account* screen (shown below).

Effective Date	Category	AR History DC Description	Amount
11/05/2021	Payment Received	Credit Card payment for \$9298.93 received. Receipt date: 11/05/2021	\$9,298.93
11/02/2021	Invoice	Invoice created. Total amount due \$16995.33. Due date 11/22/2021	\$16,995.33
10/15/2021	Payment Reminder Notice	Payment Reminder Notice sent to atrumala@thedoctors.com	
10/01/2021	Invoice	Invoice created. Total amount due \$16995.33. Due date 10/22/2021	\$16,995.33
09/17/2021	Payment Reminder Notice	Payment Reminder Notice sent to atrumala@thedoctors.com	
09/02/2021	Invoice	Invoice created. Total amount due \$16995.33. Due date 09/22/2021	\$16,995.33
08/17/2021	Payment Reminder Notice	Payment Reminder Notice sent to atrumala@thedoctors.com	
08/02/2021	Invoice	Invoice created. Total amount due \$16995.33. Due date 08/22/2021	\$16,995.33
03/15/2021	Policy Transaction	Flat Cancellation (Policy 2601045 2/22/2021 - 2/22/2022); receivable has been processed.	\$15,392.79
02/22/2021	Policy Transaction	Endorsement (Policy 2601045 4/1/2021 - 2/22/2022); receivable has been processed.	\$-13,790.25
02/22/2021	Invoice	Invoice created. Total amount due \$3848.20. Due date 03/14/2021	\$3,848.20
02/22/2021	Policy Transaction	New Business (Policy 2601045 2/22/2021 - 2/22/2022); receivable has been processed.	\$15,392.79
02/22/2021	Policy Term Issued	Policy Term 2601045 02/22/2021 - 02/22/2022 created	
02/22/2021	Account Created	Account created.	

Documents Drop-Down Resources

View Documents

Click the **Documents** drop-down arrow and select **View Documents**.

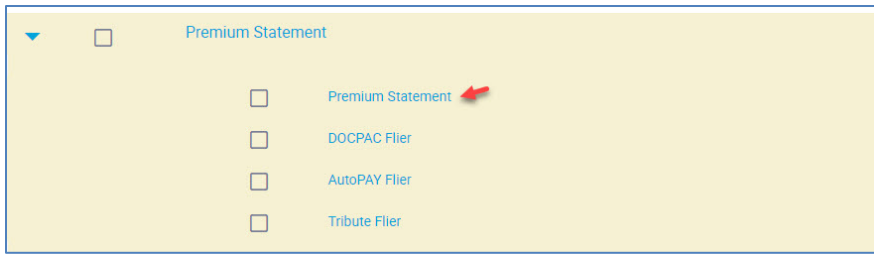


You will see the *View Documents* screen.

Note: The date range defaults to the last 12 months and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.

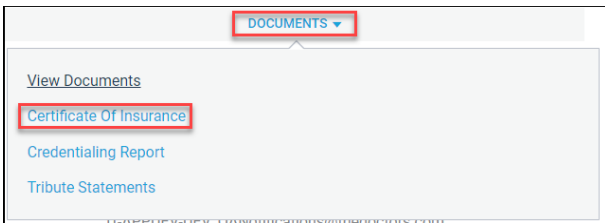
View Documents			
Show these document types:			
<input checked="" type="checkbox"/>	Policy	<input checked="" type="checkbox"/>	Billing
<input checked="" type="checkbox"/>	Tribute	<input checked="" type="checkbox"/>	Additional
From:	5/18/2020	To:	5/18/2021
GO ▶			
<input type="checkbox"/>	Name	Policy	Delivery Date
<input type="checkbox"/>	Premium Statement	0054321	05/17/2021
<input type="checkbox"/>	Premium Statement	0054321	02/16/2021

With the above example, you can click **Premium Statement** to open the premium statement packet to see the following individual document names.

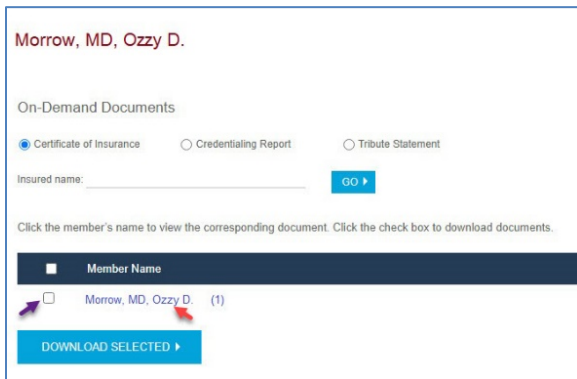


Certificate of Insurance

Click **Documents > Certificate of Insurance** to see the *Certificate of Insurance* screen.

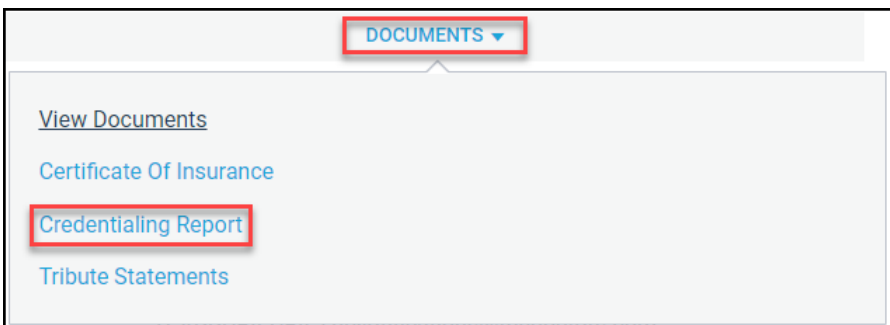


Click on the member's name link to download the certificate of insurance (COI).



Credentialing Report

Click **Documents > Credentialing Report** to see the *Credentialing Report* screen.



Click on the member's name link to download the credentialing report.

Morrow, MD, Ozzy D.

On-Demand Documents

Certificate of Insurance
 Credentialing Report
 Tribute Statement

Insured name: _____ [GO ▶](#)

Click the member's name to view the corresponding document. Click the check box to download documents.

<input type="checkbox"/>	Member Name
<input type="checkbox"/>	Morrow, MD, Ozzy D. (1) ←

[DOWNLOAD SELECTED ▶](#)

For both documents, you can click the member's name to view the COI as a *.PDF (see **red** Arrow) or click the checkbox (see **purple** arrow) and then click **Download Selected** to download and save the file as a *.PDF.

Note: You are not able to generate a credentialing report for a member that has "cancelled" as their insured status. Member Services can provide the requested report to the cancelled member if the former insured member provides the request in writing on their company letterhead and sign and date it within the last two years. The member can send the request to memberservices@thedoctors.com. The loss run/claims history report will be submitted directly back to the member for their review.

Tribute Statement

Click **Documents > Tribute Statement** to see the *Tribute Statement* screen.

[DOCUMENTS ▾](#)

- [View Documents](#)
- [Certificate Of Insurance](#)
- [Credentialing Report](#)
- [Tribute Statements](#)

Click **View Tribute Statement for Policy** to see the Tribute Statement.

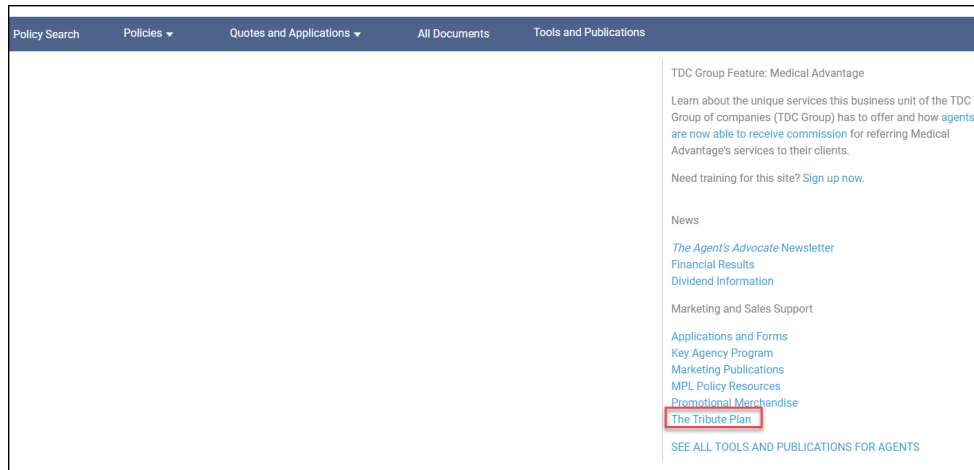
Morrow, MD, Ozzy D.

On-Demand Documents

Certificate of Insurance
 Credentialing Report
 Tribute Statement

[View Tribute Statement for Policy 00543201](#) ←

For more information on the Tribute® Plan, click **The Tribute Plan** from the portal landing page.

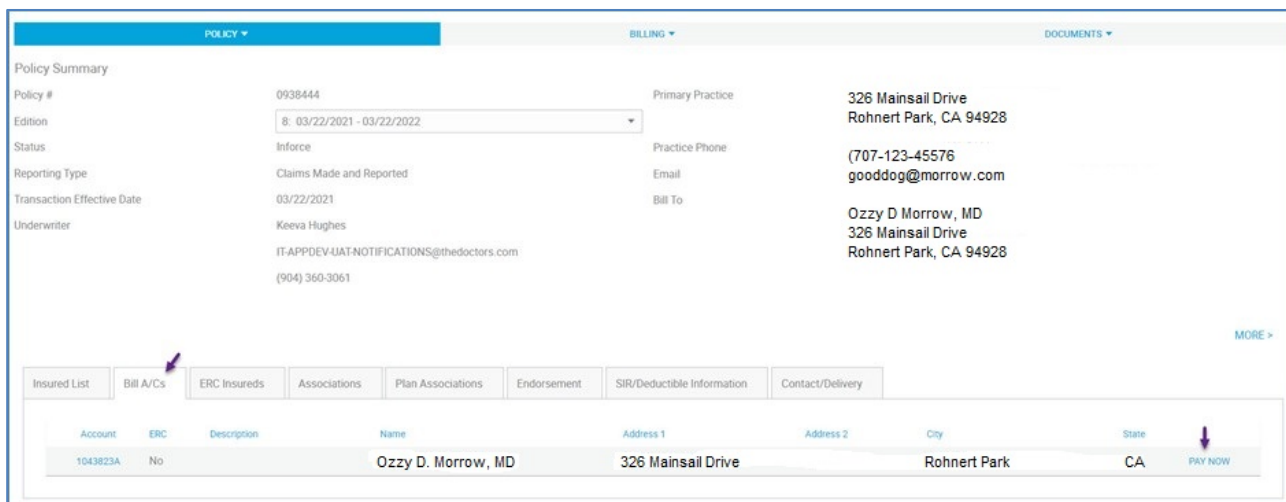


Make a Payment

From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.

The screenshot shows a search box labeled 'POLICY SEARCH' with a text input field and a blue 'GO' button with a right-pointing arrow.

You see the **Policy Summary** screen.



Click the **Bill A/Cs** tab and then click **PAY NOW**.

To make a one-time payment on behalf of your client using his or her e-check or credit card information, click **Pay amount due**, or click **Pay total outstanding amount**. Follow the prompts to complete payment.

Make a Payment

Account name:
Morrow, MD, Ozzy D
Billing account: 1041335A
Primary policy: 0934246

Policy term: 1/8/2021 to 1/8/2022

Total outstanding amount: **\$359.52**

Total billed amount: **\$0.00**

Groups, please note: All payments will be applied to this account, not to an individual member of the group.

Other Ways to Pay

Call (800) 421-2368

Or mail your check. Please include your account number, 1041335A, on your check.

The Doctors Company
PO Box 842045
Los Angeles, CA 90084-2045

Questions about your bill?
Contact Member Services:
[\(800\) 421-2368](tel:8004212368)

Make a One-Time Payment

Pay total outstanding amount: \$359.52

Pay this amount: _____

Voluntary **DOCPAC** contribution

Include DOCPAC: _____

Do not include DOCPAC

Total payment amount **\$0.00**

ENTER PAYMENT INFO ▶

Save Time with Recurring Payments

You are currently enrolled in **AutoPAY**. Your next payment will be deducted from your checking account ending in 6124.
[Cancel AutoPAY](#)

UPDATE AUTOPAY ▶

Make an E-Check Payment

From the *Make a One-Time Payment* screen, enter the payment amount in the *Pay this amount* field and click **ENTER PAYMENT INFO**.

Make a One-Time Payment

Pay total outstanding amount: \$3,485.65

Pay this amount:

Voluntary **DOCPAC** contribution: \$12.50

Include DOCPAC: _____

Do not include DOCPAC

Total payment amount **\$1,000.00**

ENTER PAYMENT INFO ▶

Enter the e-check information and follow the prompts to complete payment.

Enter Payment Information

Account name:
Ohtggk, DDS, Vgi A.

Please enter your client's e-check or credit card information to make a payment on his or her behalf.

Pay by:
 E-check Credit card

Account type:
Corporate checking

Routing number (What's this?):
09100019

Account number (What's this?):
1234567

Re-enter account number:
1234567

Name on account:
Vgi Ohtggk

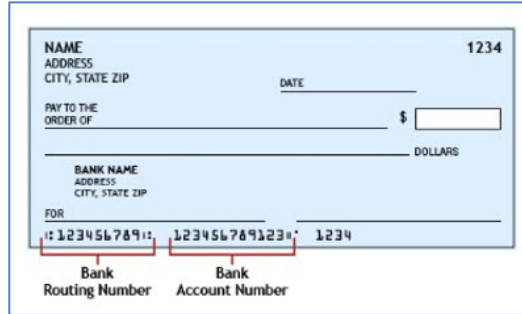
Billing Information

First name:
Vgi

Last name:
Ohtggk

Address:
1199 S. Pwybwjs Pbsjib

City:
Miami



Enroll in AutoPAY

From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.

POLICY SEARCH

GO ▶

You see the *Policy Summary* screen. Click the **Bill A/Cs** tab and then click **PAY NOW**.

POLICY BILLING DOCUMENTS

Policy Summary

Policy # 0938444 Primary Practice 5411 P. Pjrwjwj Qyjwvy #582

Edition 8: 03/22/2021 - 03/22/2022 Miami, FL 33134

Status Inforce Practice Phone (936) 469-5666

Reporting Type Claims Made and Reported Email IT-APPDEV-DEV_QANotifications@thedoctors.com.TEST

Transaction Effective Date 03/22/2021 Bill To Vgi A. Ohtggk, DDS

Underwriter Keeva Hughes 1199 S. Pwybwjs Pbsjib #590
IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com Miami, FL 33134
(904) 360-3061

MORE >

Insured List **Bill A/Cs** ERC Insureds Associations Plan Associations Endorsement SIR/Deductible Information Contact/Delivery

Account	ERC	Description	Name	Address 1	Address 2	City	State	
1043823A	No		Vgi A. Ohtggk, DDS	1199 S. Pwybwjs Pbsjib	#590	Miami	FL	PAY NOW

Click **ENROLL IN AUTOPAY** and enter the member's information.

Make a Payment

Account name:
Ynnnsjih, DMD, Ognunjn

Billing account: 1037687A
Primary policy: 0930417
There is no outstanding amount.

Groups, please note: All payments will be applied to this account, not to an individual member of the group.

Questions about your bill?

Contact Member Services:

[\(800\) 421-2368](tel:8004212368)

Save Time with Recurring Payments

AutoPAY is easy. With AutoPAY, your installments are automatically paid by deductions from your financial institution or charges to your credit card. Choose automatic deductions from your financial institution and receive a one-time \$25 credit. Enroll today!

[ENROLL IN AUTOPAY ▶](#)



Update or Cancel AutoPAY

To update or cancel AutoPAY for a policy, From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.

POLICY SEARCH

You see the *Policy Summary* screen. Click the **Bill A/Cs** tab and then click **PAY NOW**.

POLICY ▼ BILLING ▼ DOCUMENTS ▼

Policy Summary

Policy #	0938444	Primary Practice	5411 P. Pjrwjw Qyiwvy #582
Edition	B: 03/22/2021 - 03/22/2022		Miami, FL 33134
Status	Inforce	Practice Phone	(936) 469-5666
Reporting Type	Claims Made and Reported	Email	IT-APPDEV-DEV_QANotifications@thedoctors.com.TEST
Transaction Effective Date	03/22/2021	Bill To	Vgi A. Ohtggk, DDS
Underwriter	Keeva Hughes		1199 S. Pwybwjs Pbsjib #590
	IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com		Miami, FL 33134
	(904) 360-3061		

MORE >

Insured List **Bill A/Cs** ERC Insureds Associations Plan Associations Endorsement SIR/Deductible Information Contact/Delivery

Account	ERC	Description	Name	Address 1	Address 2	City	State	
1043823A	No		Vgi A. Ohtggk, DDS	1199 S. Pwybwjs Pbsjib	#590	Miami	FL	PAY NOW

To cancel an upcoming AutoPAY, click **Cancel AutoPAY** and follow the prompts. To make changes to an existing AutoPay, click **UPDATE AUTOPAY**.

Make a Payment

Account name:
Ynnnsjih, DMD, Ognunjn

Billing account: 1037687A
Primary policy: 0930417
There is no outstanding amount.

Groups, please note: All payments will be applied to this account, not to an individual member of the group.

Questions about your bill?
Contact Member Services:
[\(800\) 421-2368](tel:8004212368)

Save Time with Recurring Payments
You are currently enrolled in [AutoPAY](#). Your next payment will be deducted from your checking account ending in 4567.
[Cancel AutoPAY](#) ←
[UPDATE AUTOPAY](#) ▶ ←

Quotes and Applications

Policy Search Policies ▾ **Quotes and Applications ▾** All Documents Tools and Publications

- [Get a Quote](#)
- [View Quotes and Applications for Dentists](#)
- [View Quotes and Applications](#)
- [Referral Links](#)

Quotes and Applications is a resource for agencies that are set up to process online quotes and applications.

Get a Quote is where you can start to process **Dental Quotes and Applications**, **Advanced Practice Clinicians Quotes**, and **Quote Estimate for Physicians and Surgeons**.

Referral Link is where you can find the advanced practice clinicians (APCs) referral link. You are able to copy and paste the link to provide to a prospect APC.

View Quotes and Applications for Dentists will take you to the listing of your dental quotes and applications. After clicking, **View Quotes and Applications for Dentists**, you can access the **Dental Referral Link** from the top menu. You can copy and paste the link to provide to a prospect dentist.

Quotes and Applications

- [Get a Quote for a Dentist](#)
- [View Quotes and Applications](#)
- [Referral Links](#)

View Quotes and Applications will take you to the listing of your **Quote Estimate for Physicians and Surgeons** and well as **Advanced Practice Clinician Quotes and Applications**.

For more information, contact Agency Support by sending an email to agencysupport@thedoctors.com or by calling 800.421.2368, extension 1391.


Tools and Publications



Click **Tools and Publications** to see the *Agents and Brokers* screen with access to all the *Tools and Publications* resources. You can access many resources including application forms, marketing materials, and the *Underwriting and Business Development Contacts* sheet.

Agents and Brokers

The same qualities that make us the premium choice among physicians—experience, flexibility, strength, activism, and superior service—also make us attractive to agents and brokers. We understand the nuances of covering physicians across many specialties, from individual doctors to large groups, and we have worked with agents, brokers, and administrators to build products around the specialized needs of our physicians and hospitals.



Here's a quick guide to submitting business:

Admitted: All physician and hospital professional liability submissions expiring on admitted paper will be underwritten in our Regional Underwriting operations, regardless of premium size. Our Regional Underwriting units will refer submissions requiring admitted high layer excess, loss portfolio transfers, and all fronting arrangements to Headquarters Underwriting.

E&S Lines: All physician and hospital professional liability submissions expiring on E&S paper, or requiring facultative reinsurance, will be underwritten by TDC Specialty Underwriters (TDCSU), a wholly owned subsidiary of The Doctors Company. [Visit TDCSU's website](#) for a complete list of risk classes, underwriting contacts, and submission information.

Use our [Underwriting and Business Development Contacts](#) map for contact and submission information.

Please send submissions requiring admitted paper to the Underwriting region *with the majority of the exposure*. If you are unsure of where to send a submission, send it to any underwriter or region and we'll route it to the appropriate team.

To Get Started

[Sign in if you already have a user ID and password.](#)

If you are an agent or broker representing The Doctors Company and have not yet registered, please [sign up by creating a new user ID and password](#) and providing us with some identifying information. The verification/activation process typically takes up to two business days.

For detailed instructions on using online Certificates of Insurance, credentialing reports, billing information, and more, see the [Agent/Broker Portal User Guide](#).

Prospective Agents and Brokers

If you are an established medical malpractice agent or broker representing physicians, [we'd like to hear from you](#).

For doctors who are unable to find coverage in the standard markets, we operate our subsidiary, [TDC Specialty Insurance Company](#), which offers innovative coverage solutions for physicians outside traditional risk profiles.

Tools and Publications for Agents

- [Advanced Practice Clinicians](#)
- [Quote Estimate Tool](#)
- [New York Agent Information](#)

News

- [The Agent's Advocate Newsletter](#)
- [2022 Annual Agents and Brokers Meeting](#)
- [2021 Financial Results](#)
- [Agent Email Archive](#)

Marketing and Sales Support

- [Appetite Guide](#)
- [Applications and Forms](#)
- [Agent Marketing Program](#)
- [Broker of Record Guidelines](#)
- [Co-op Marketing Program for Chairman's Circle and Key Agencies](#)
- [Dental Resources for Agents](#)
- [Dividend Information](#)
- [Marketing Publications Print Order Form](#)
- [Marketing Publications for Download](#)
- [Patient Safety Centers of Excellence](#)
- [Promotional Merchandise](#)
- [Underwriting and Business Development Contacts](#)
- [2023 Key Agency Program](#)

Coverage Information

- [New Purchased Tail Rates](#)
- [MPL Policy](#)
- [CyberGuard](#)
- [MediGuard PLUS Rate Sheet](#)
- [The Tribute Plan](#)

Report a Claim - Report a Claim

From the main dashboard of the Agent/Broker Portal, at the top right, click **Report a Claim**.



You will be able to report a claim with the steps outlined below.

Reporting a Claim or Incident

As a member, it is essential that you notify The Doctors Company immediately if an incident occurs that may lead to a claim or if a claim has been made against you. Your claim specialist will immediately go into action to protect you. We'll be with you every step of the way.

1 Submit a First Report

To report a claim, please submit a First Report of New Incident or Claim.

[SUBMIT A FIRST REPORT ▶](#)

[Learn more about the incident or claim notification process](#) ▼

To report an administrative or regulatory action, submit a [MediGuard® Claim Form](#); or to report a suspected data breach, submit a [CyberGuard® Claim Form](#).

2 Submit all documentation

Submit all documentation that you have received regarding your claim or incident.

You may select multiple documents in PDF, JPEG, or Microsoft Word file formats and attach them to the online First Report completed in step 1 above.

Please do not forward medical records at this time.

? If you need help

[Contact our Claim Administrative Support Team by email](#), or call (800) 421-2368.

Agency Support Assistance

Thank you for reviewing our *Agent/Broker Portal User Guide*. For overall questions, or to provide feedback, contact Agency Support at agencysupport@thedoctors.com or 800.421.2368, extension 1391. If you would like personalized training for your agency, you can [schedule training](#), which will occur via a Microsoft Teams session.