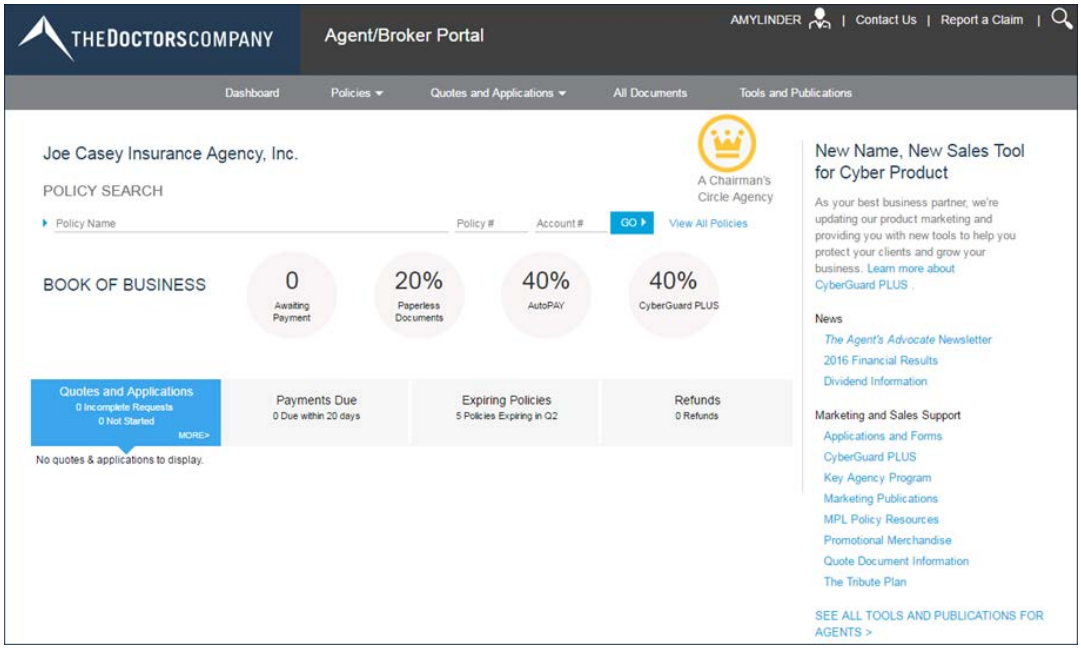
THE DOCTORS COMPANY
medical malpractice insurance



Agent/Broker Portal

Training Guide

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Introduction

To improve and expand our partnership with you, The Doctors Company completed a redesign of our Agent/Broker Portal. We created an all-inclusive dashboard that provides a synopsis of your business and immediate access to your clients' policies, billing information, and policy documents with effortless navigation. The end result is a more policy-centric portal where you spend less time on redundant searches and more time assisting your clients. This training guide explains the new and existing features.

What's New

New features have been added to the Agent/Broker Portal. You can now make one-time premium payments on behalf of your standard business clients using their e-check or credit card information (custom and middle market accounts are excluded). You can also conveniently schedule them for automatic payments.

Processing premium payments is optional for agents—your clients can still make premium payments by their current preferred method.

For more information see:

Agent Online Payments and Enrollment in AutoPAY

Make a Payment

Enroll in AutoPay

Also new, the *Payment Due* reports have a new *Payment* column for processing payments on your client's behalf.

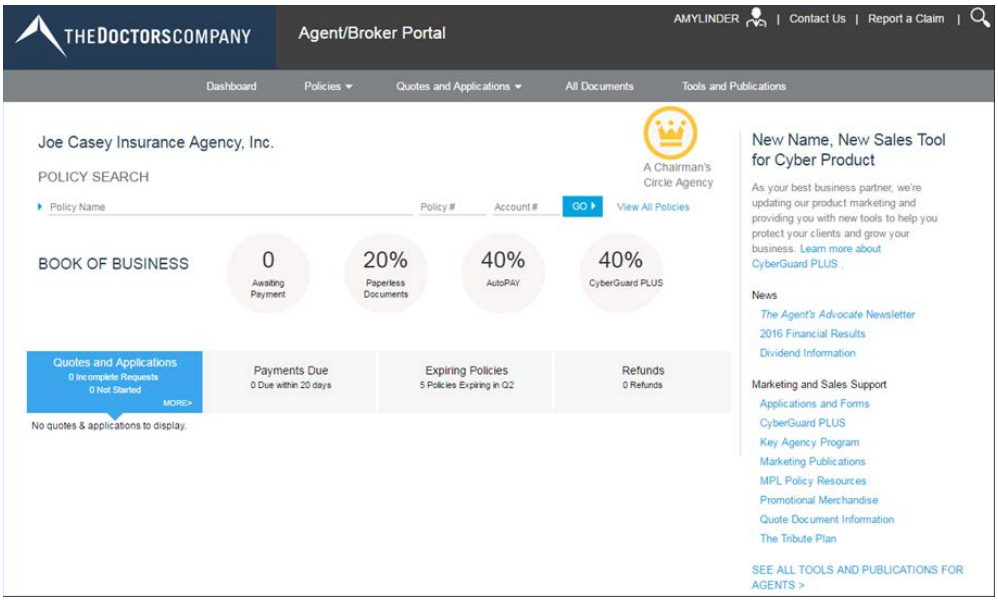
Payment Due Lists – Make a Payment

Payment Due Lists – Enroll in AutoPay

Agent Dashboard

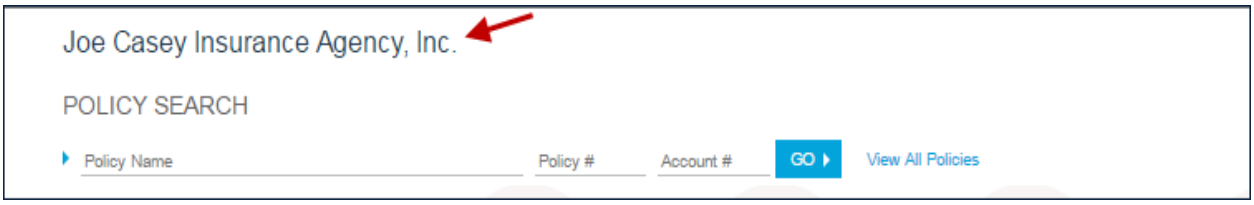
The most significant enhancement is the capability to quickly search and find the information you need by utilizing the new dashboard.

Once you sign in you see the new dashboard.



Agency Information

To review the current information we have for your agency, click your agency name. You see the *Agency Information on File* screen.

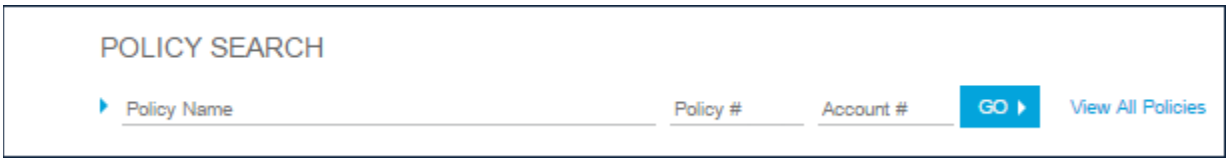


Note: You can also click your user ID and select *Review Agency Information*.

To submit changes, click agencysupport@thedoctors.com to send an e-mail with the requested changes to Agency Support.

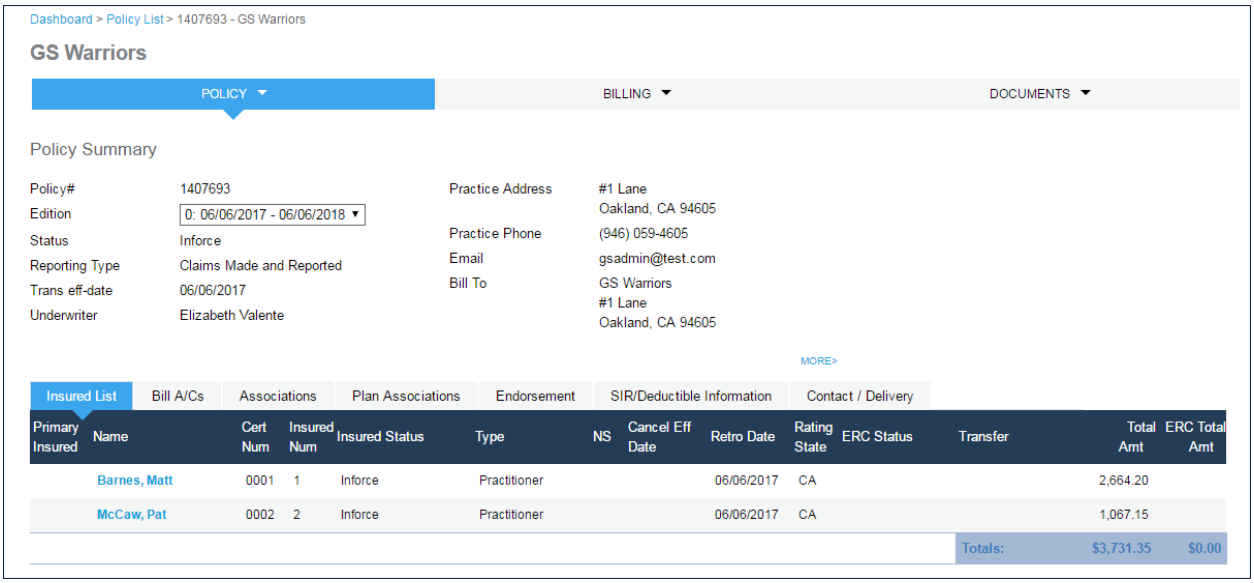
Policy Search

You can find a specific policy using our *Policy Search* tool located on the dashboard. Enter the policy name, policy number, or account number and click *GO*. You see the *Policy Summary* screen.

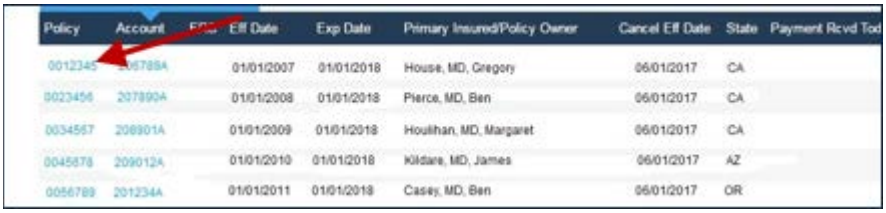


Policy Summary

The *Policy Summary* screen is your one-stop-shop for all policy-related inquiries. You can view policy information, billing information, documents, and produce Credentialing Reports, Certificates of Insurance, and Tribute Statements.



Note: When viewing policy lists, you can click the hyperlink (in light blue) associated with any policy number to view the *Policy Summary* screen. Hyperlinks are also provided for account numbers and policy names.

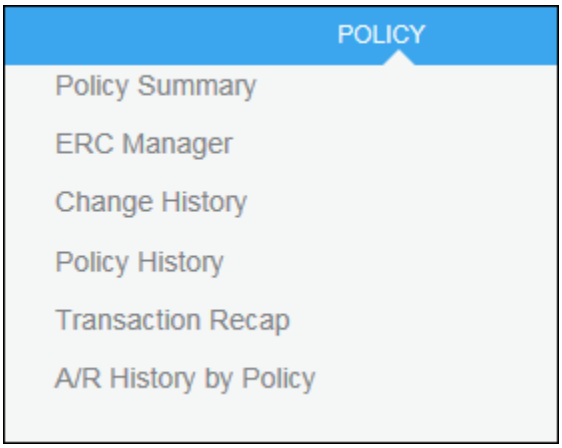


The *Policy Summary* screen has a new *Contact/Delivery* tab. This tab is similar to the existing tab in the old agent portal, but now provides information on which document types are delivered to which address.

Policy-Specific Policy Resources

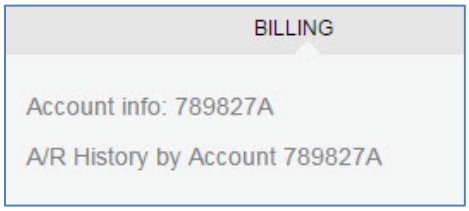
From the *Policy Summary* screen, you see the following policy-specific navigation bar.

Click the *Policy* drop-down arrow to access all policy information (including what was previously provided via Policy Details):



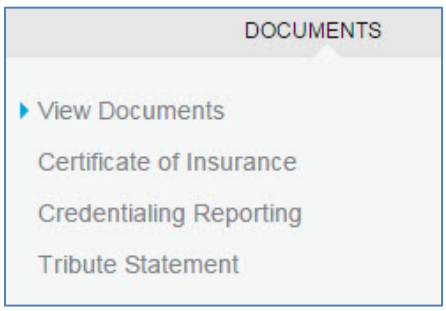
Policy-Specific Billing Resources

Click the *Billing* drop-down arrow to access:



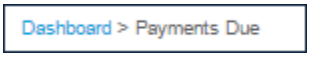
Policy-Specific Document Resources

Click the *Documents* drop-down arrow to access:



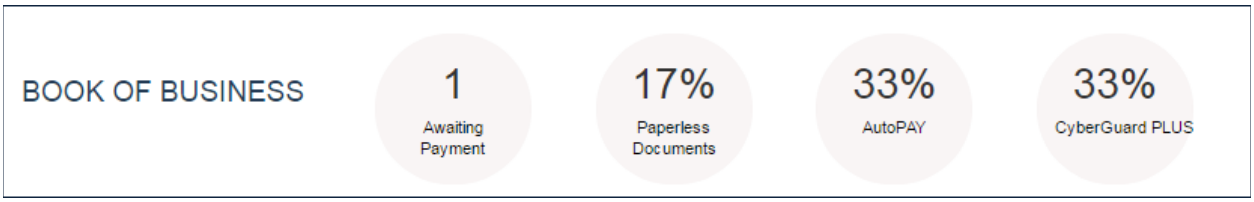
Breadcrumb Trail

A breadcrumb trail was added to the portal so you can always return to a previous screen.



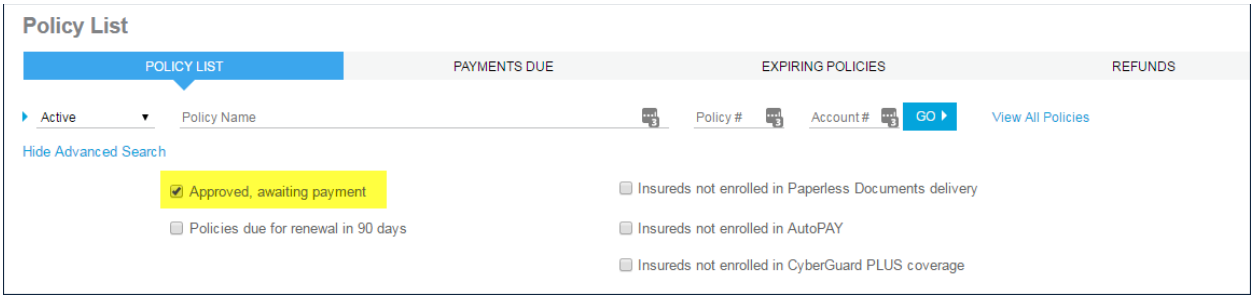
You can click any segment of the breadcrumb trail to return to that screen

Book of Business Bubbles



Awaiting Payment

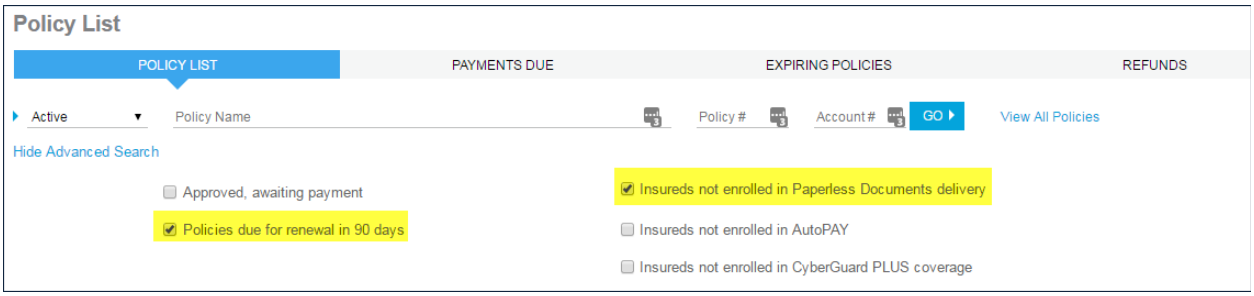
The dashboard's *Awaiting Payment* bubble notes how many policies are awaiting payment. Click the *Awaiting Payment* bubble to see new policies that are awaiting payment. Click *Show Advanced Search* for more search options.



The filter, as displayed, provides a list of policies that are approved and awaiting payment. This is your opportunity, if needed, to follow up with these new clients.

Paperless Documents

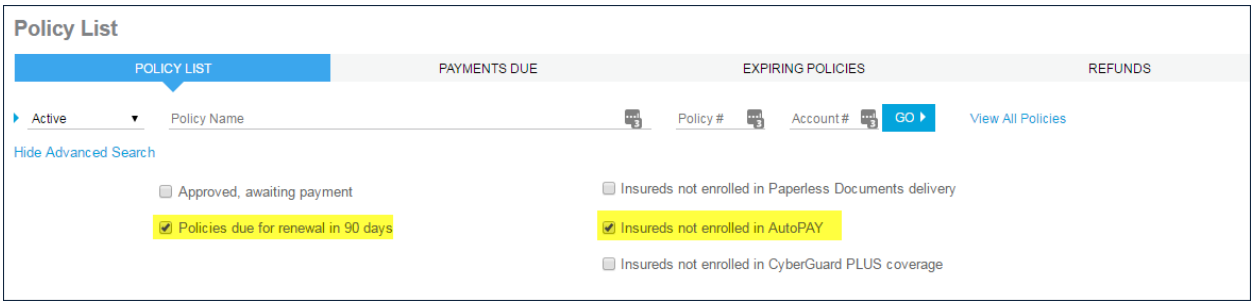
The dashboard's *Paperless Documents* bubble notes the total percent of policies that have signed up for e-delivery. Click the *Paperless Documents* bubble to see a list of policies that are not enrolled in paperless document delivery. Click *Show Advanced Search* for more search options.



The filters, as displayed, provide a list of policies that are up for renewal in 90 days and have not signed up for paperless documents. This is your opportunity to discuss with your clients the benefits of going paperless and receiving policy and billing documents as soon as new documents are available.

AutoPAY

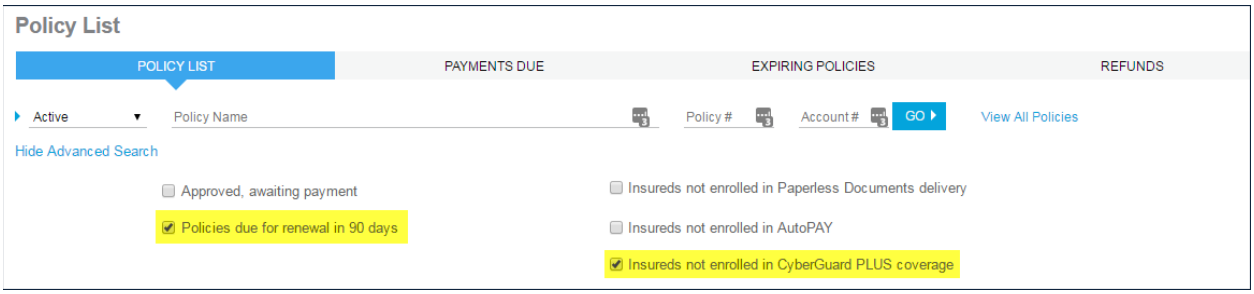
The dashboard's *AutoPAY* bubble notes the total percent of insureds that have signed up for AutoPAY. Click the *AutoPAY* bubble to see policies that are not enrolled in automatic payments. Click *Show Advanced Search* for more search options.



The filters, as displayed, provides a list of policies that are up for renewal in 90 days and have not signed up for AutoPAY. This is your opportunity to discuss with your clients the benefits of signing up for AutoPAY, which is easy and saves your clients time and postage. First-time enrollees currently receive a one-time $25 credit.

CyberGuard PLUS

The dashboard's *CyberGuard PLUS* bubble notes the total percent of insureds that have signed up for CyberGuard® PLUS. Click the *CyberGuard PLUS* bubble to see policies that are not enrolled in CyberGuard PLUS coverage. Click *Show Advanced Search* for more search options.

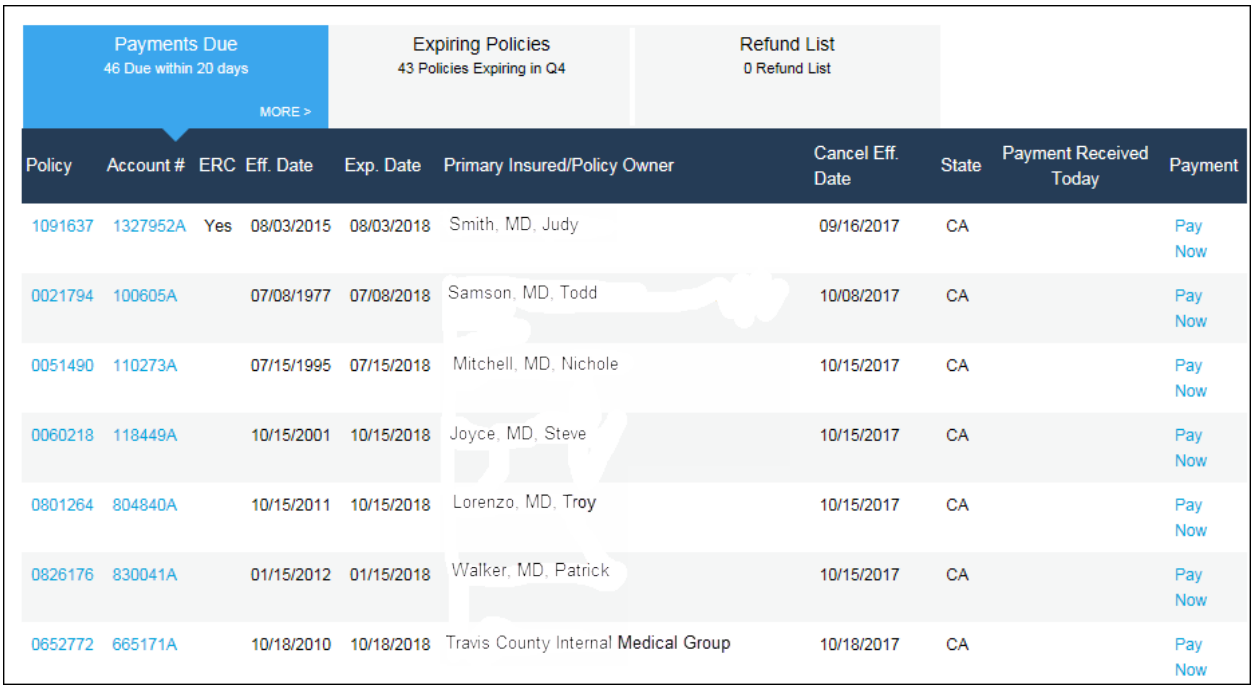


The filters, as displayed, provide a list of policies that are up for renewal in 90 days and have not enrolled in CyberGuard PLUS coverage. This is your opportunity to discuss with your clients the benefits of CyberGuard PLUS coverage, which protect your clients' medical practices with higher limits for cyber and regulatory liability coverage.

Time Sensitive Policy Lists

The dashboard displays three time-sensitive policy lists: *Payments Due*, *Expiring Policies*, and *Refunds*.

Payments Due

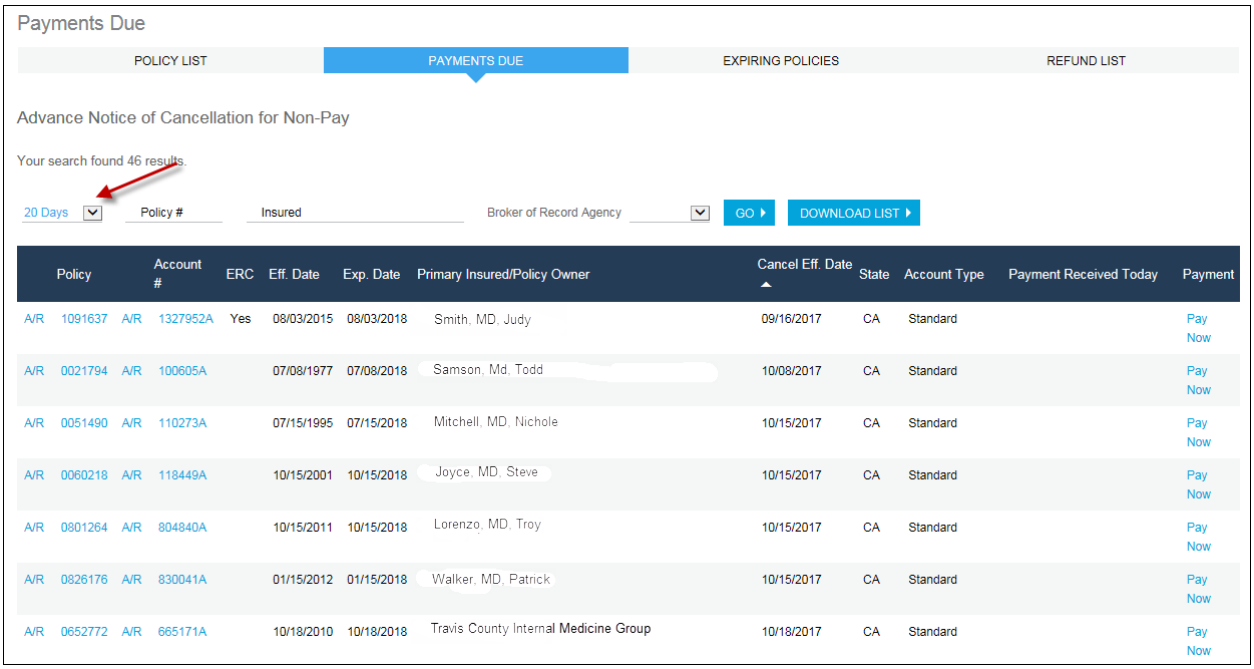


Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment
1091637	1327952A	Yes	08/03/2015	08/03/2018	Smith, MD, Judy	09/16/2017	CA		Pay Now
0021794	100605A		07/08/1977	07/08/2018	Samson, MD, Todd	10/08/2017	CA		Pay Now
0051490	110273A		07/15/1995	07/15/2018	Mitchell, MD, Nichole	10/15/2017	CA		Pay Now
0060218	118449A		10/15/2001	10/15/2018	Joyce, MD, Steve	10/15/2017	CA		Pay Now
0801264	804840A		10/15/2011	10/15/2018	Lorenzo, MD, Troy	10/15/2017	CA		Pay Now
0826176	830041A		01/15/2012	01/15/2018	Walker, MD, Patrick	10/15/2017	CA		Pay Now
0652772	665171A		10/18/2010	10/18/2018	Travis County Internal Medical Group	10/18/2017	CA		Pay Now

The dashboard notes how many policies have payments due within 20 days and displays the 20-day list.

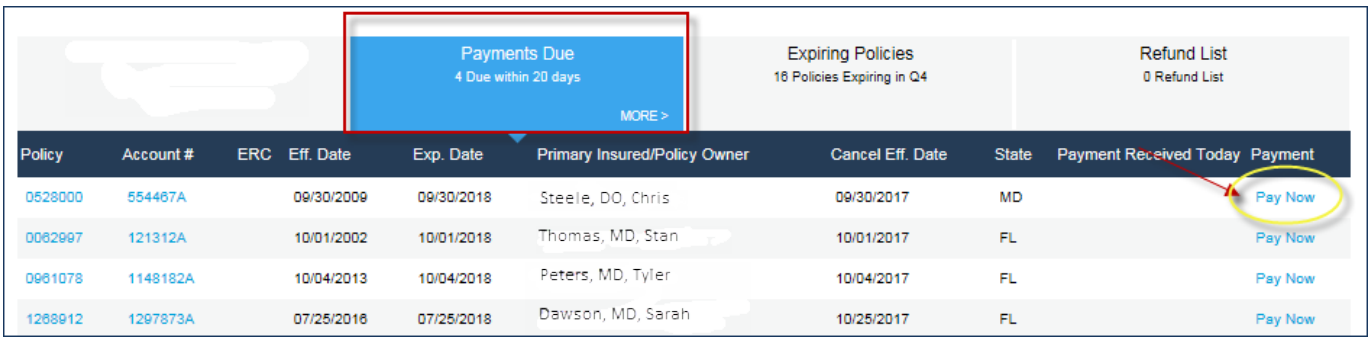
Click

to see the complete list with options to filter the search as needed. You can also select the 10-day or 5-day list.



The *Payment Due* reports have a *Payment Received Today* column. This field is updated in real time as payments are received and processed.

New: The *Payment Due* reports also have a new *Payment* column with *Pay Now* or *AutoPay* listed.



- By clicking *Pay Now* you see the *Billing and Payment* screen where you can select the amount to pay on behalf of a client. For more information, see Payment Due Lists – Make a Payment.

- By clicking *AutoPay*, you see the *Billing and Payment* screen where you can enroll in AutoPAY on behalf of a client. For more information, see Payment Due Lists – Enroll in AutoPAY.

Click *Download List* to download a complete *Payments Due* report in Excel format.

Note: The *Cancel Process Date* is available on downloaded policy lists.

Expiring Policies

The dashboard notes how many policies will expire for the selected quarter and displays the list of policies (with the exception of polices where the renewal has already been processed) for that quarter. Click

to see the complete list with options to filter the search as needed. You can also select to see policies that will expire in future quarters.

Note: When looking at the current quarter you do not see the policy listed if that policy's renewal has already been processed.

For example, the policy for Dr. Casey has a renewal date of 9/1/17. The Doctors Company's internal systems batch processes the renewal on 6/26/17, and generates and sends the client the Annual Premium Statement with a 6/26/17 Date of Billing and a Premium Due Date of 9/1/17. If the payment is not received on/or before 9/1/17 the policy will not renew and the coverage will expire on 9/1/17.

Looking at future quarters will display a greater number of policies as the batch renewal process may not have occurred.

Refund List

The dashboard notes how many policies have refunds and displays the list of policies with refunds. Click

to see the complete list with options to filter the search as needed.

New: Agent Online Payments and Enroll in AutoPAY

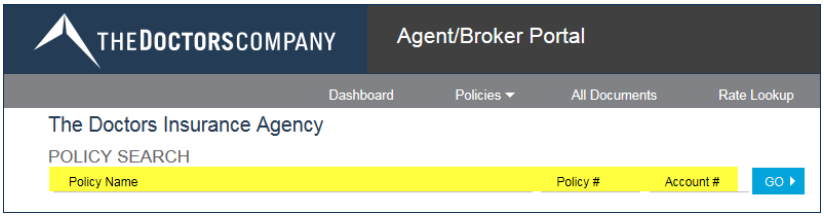
New online pay features now appear on your Agent/Broker Portal. You can make payments and sign up for AutoPAY on your client's behalf.

Note: The online pay features are only available for standard accounts (custom and middle market accounts are excluded).The online pay features will be available for your clients with The Doctors Company risk retention group (RRG) policies in 2018.

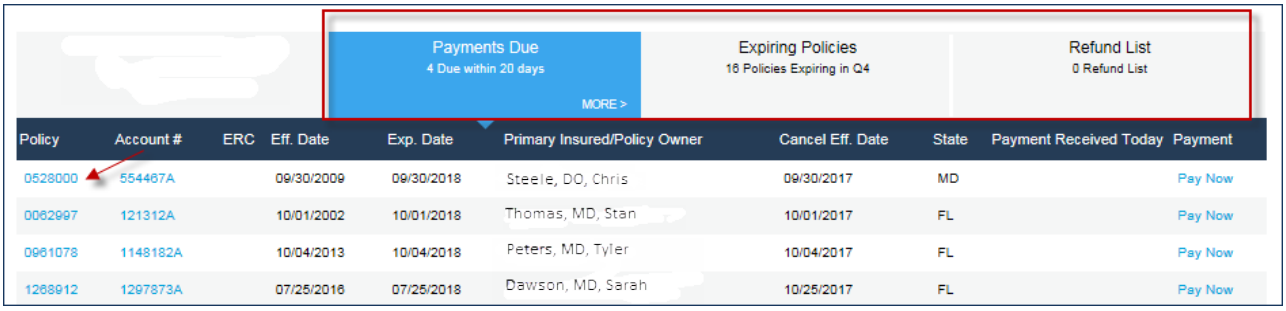
Access to the Agent/Broker Portal, so that you can access the new online payment features, requires an active user ID. If you do not have an active user ID, or are unable to login, please contact Agency Support by sending an e-mail to agencysupport@thedoctors.com, or by calling (800) 421-2368, extension 1391.

Make a Payment

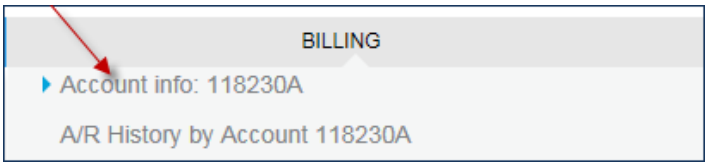
From your dashboard, enter in the policy name, policy number, or account number in the *Policy Search* tool and click *GO*.



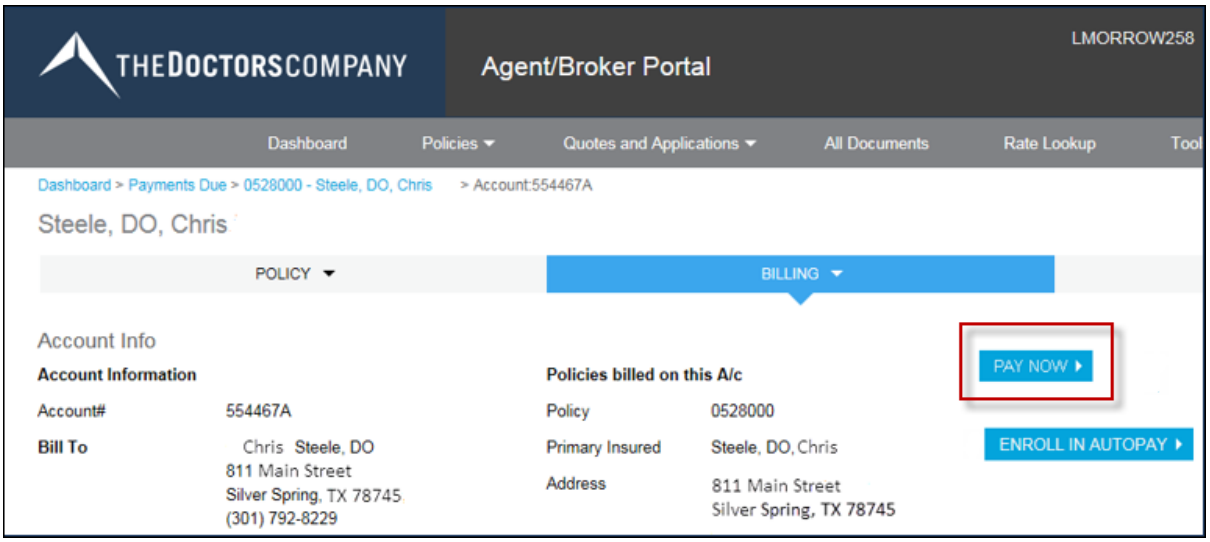
Or, click on the policy number hyperlink on any list in the agent portal.



You will see the *Policy Summary* screen. Click the *Billing* tab and select the *Account Info* option from the drop-down list.



Once selected, the *Account Summary* screen displays. Click *PAY NOW* to navigate to the *Billing and Payment* screen.

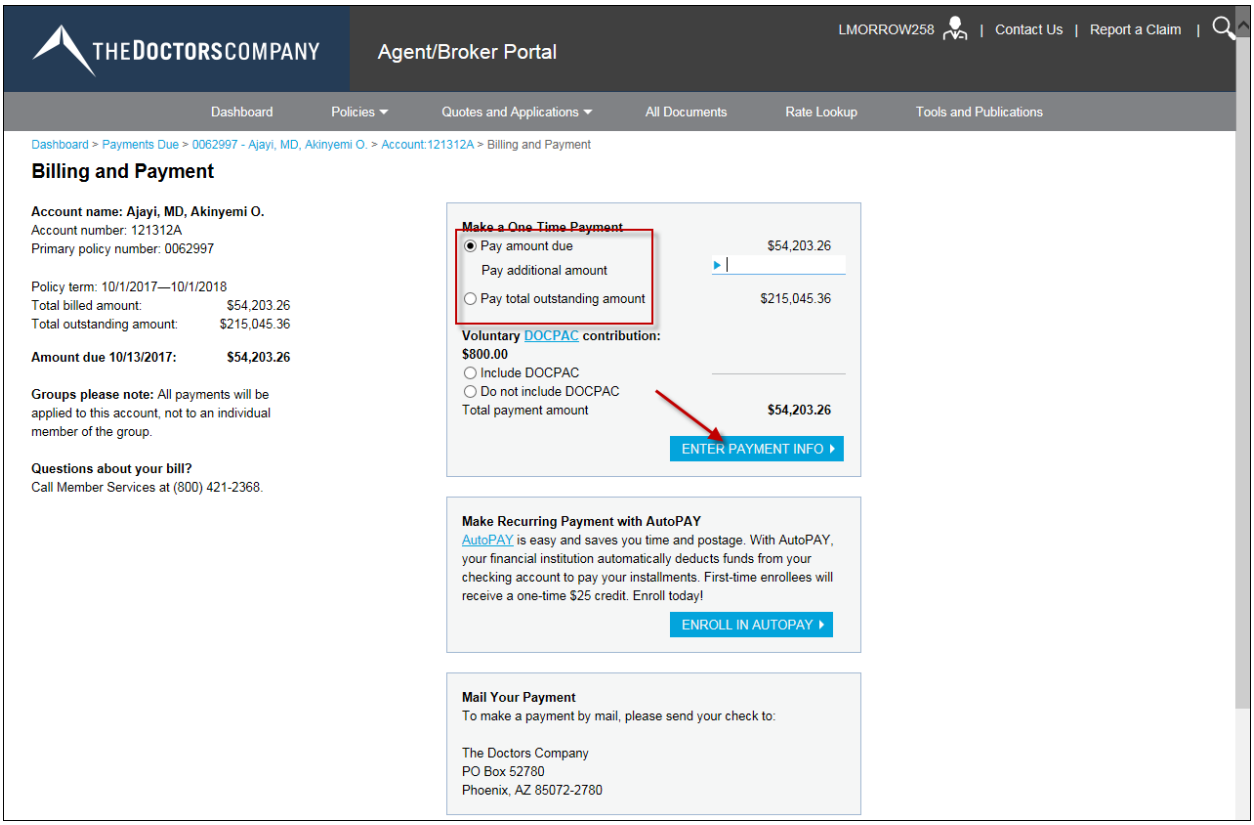


When you click *PAY NOW*, you begin the process to make a one-time payment on behalf of your client using his or her e-check or credit card information.

Enter the payment amount.

Be sure to click “Pay amount due” or “Pay total outstanding amount.” If you do not, the *ENTER PAYMENT INFO* button will be grayed out).

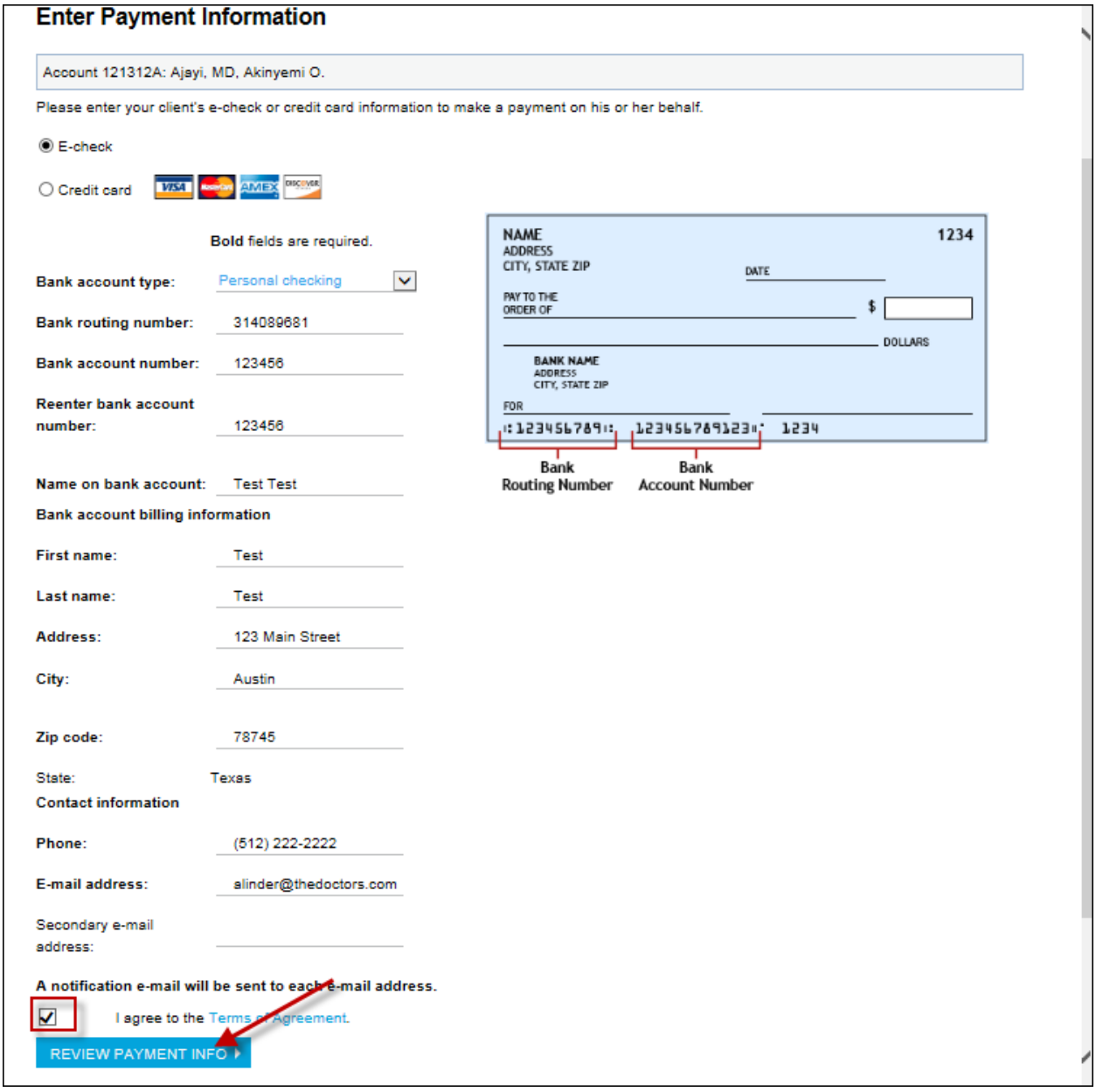
Click *ENTER PAYMENT INFO*.



You will see the *Enter Payment Information* screen.

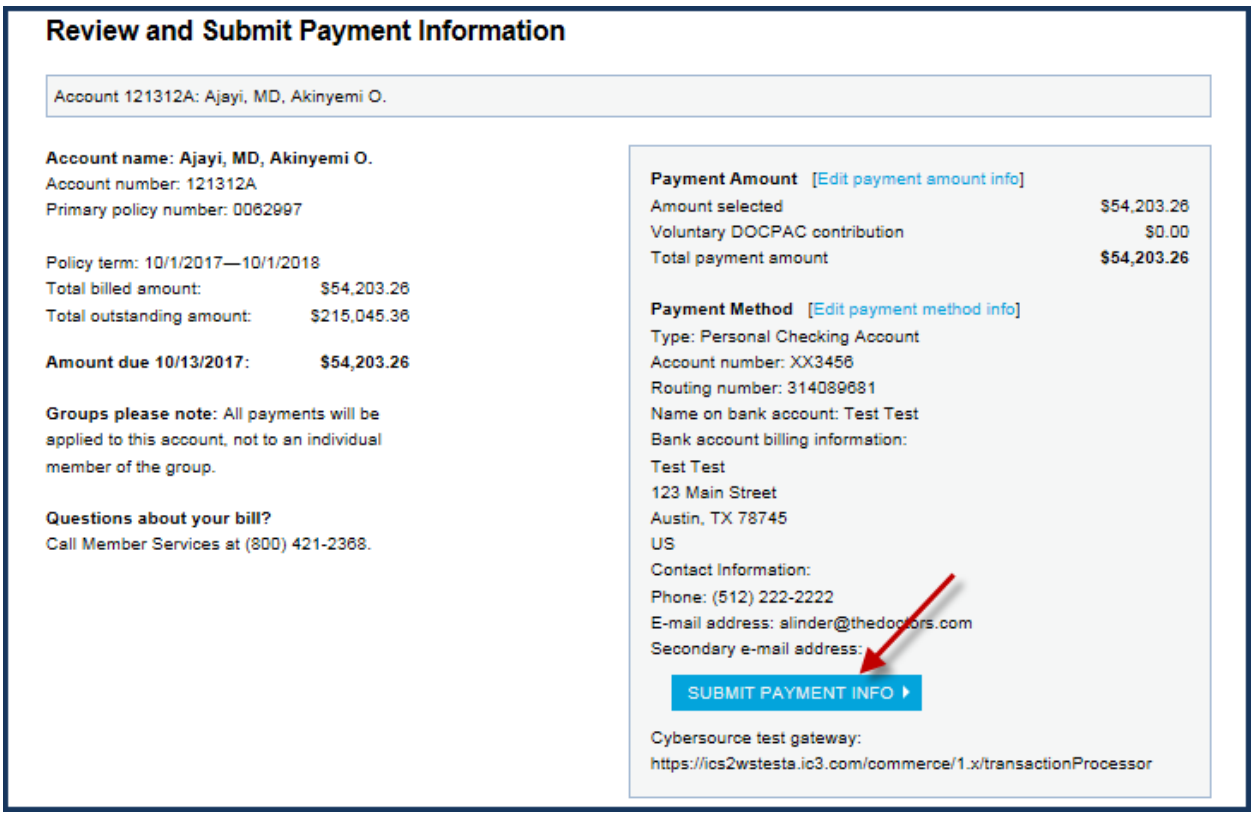
Enter the payment information. Payment options are e-check or credit card.

Once all payment information is entered, check the *Terms of Agreement* box and click *Review Payment Info*.



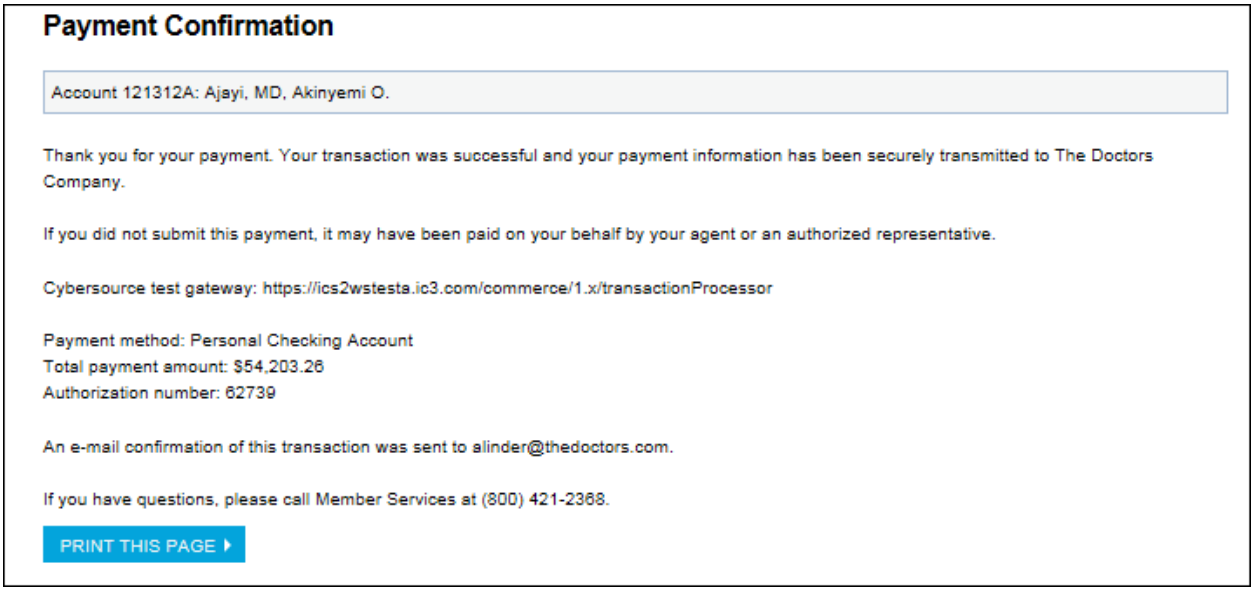
You will see the *Review and Submit Payment Information* screen. You can now complete a final review of the payment amount and method before submitting payment.

After review is complete, click *Submit Payment Info*.

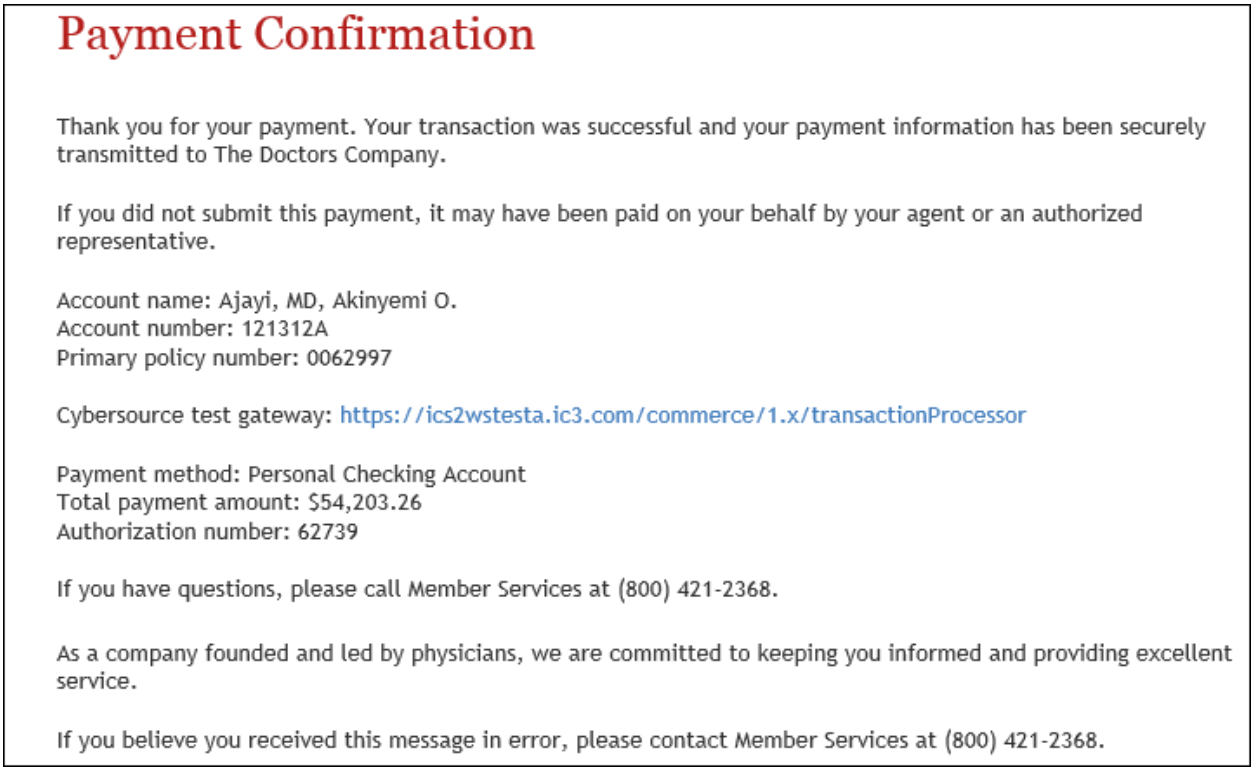


Once submitted, the confirmation page appears and a confirmation e-mail is sent to the e-mail address provided.

Confirmation Screen



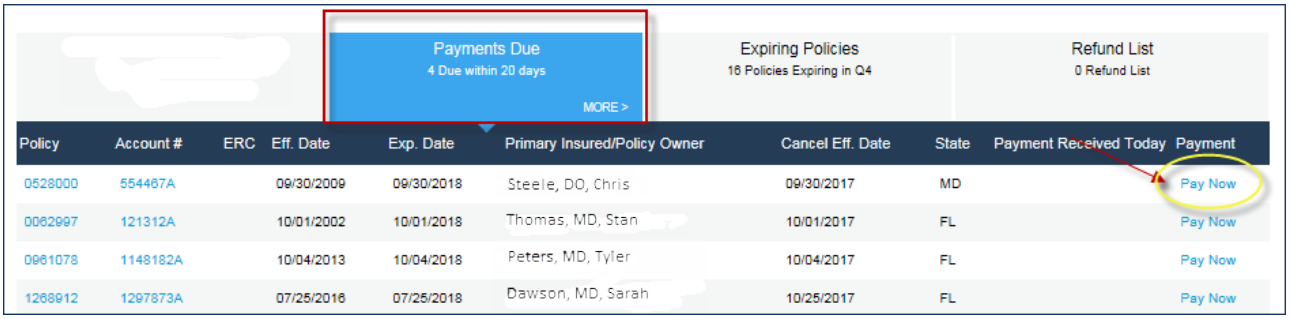
Confirmation E-mail



Payment Due Lists – Make a Payment

Another way to access the online payment functionality is by selecting the Payment Due tab on your Agent Portal dashboard.

You see the 20-day Payment Due list (by default), which has a new 'Payment column' with *Pay Now* or *AutoPay* listed.

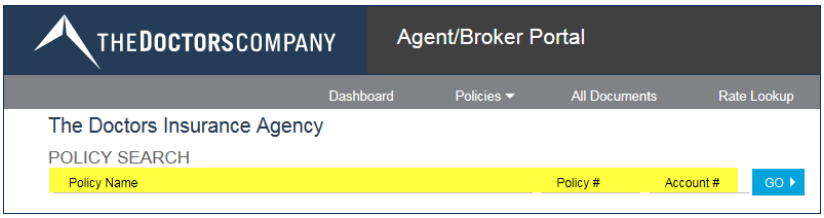


By clicking *Pay Now* you see the Billing and Payment screen where you can select the amount to pay.

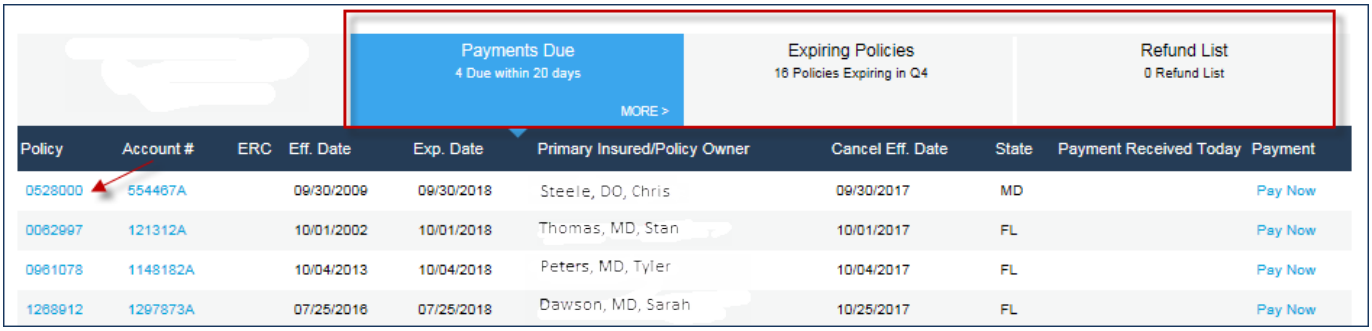
Click *ENTER PAYMENT INFO* to enter the payment information and submit payment. For more information on payment processing, see Make a Payment.

Enroll in AutoPAY

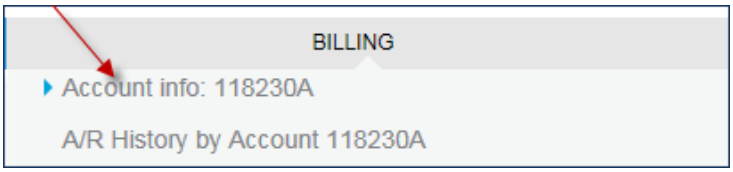
From your dashboard, enter the policy name, policy number, or account number in the *Policy Search* tool and click *GO*.



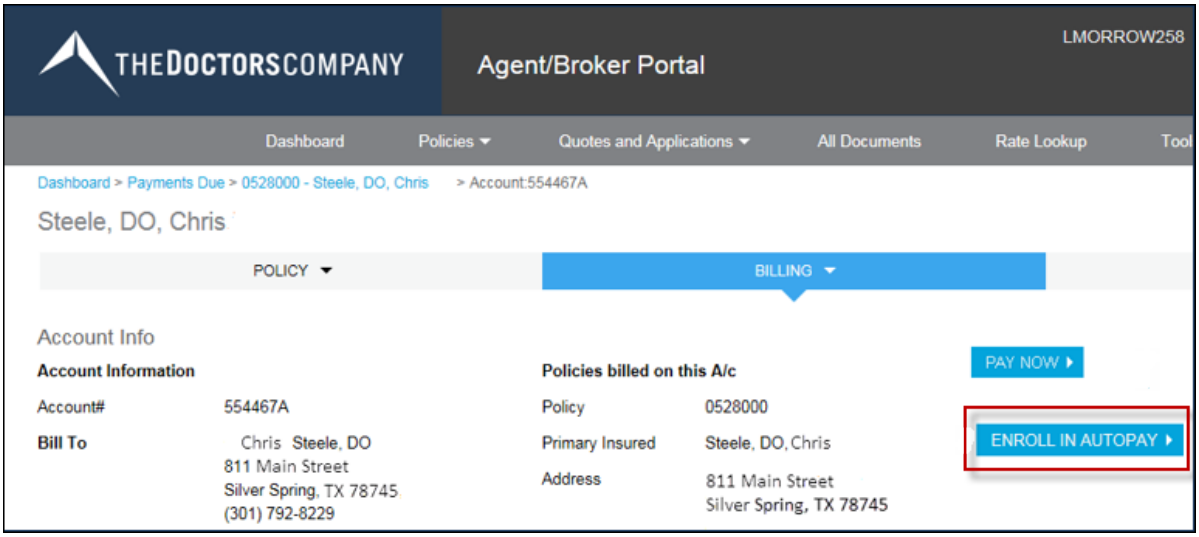
Or, click the policy number hyperlink on any list in the agent portal.



You will see the *Policy Summary* screen. Click the *Billing* tab and select the *Account Info* option from the drop-down list.

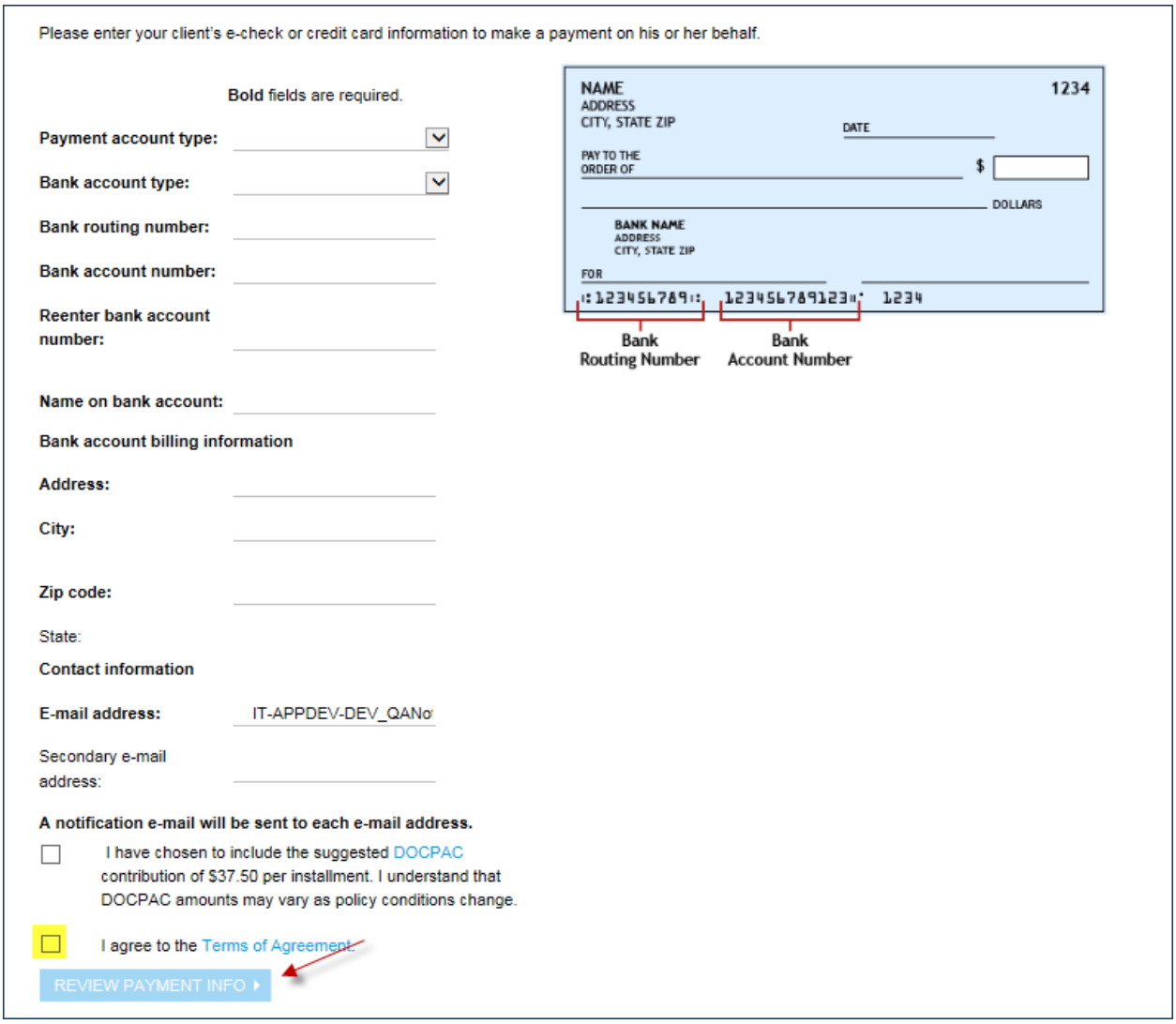


You will see the *Account Summary* screen. Click *ENROLL IN AUTOPAY*.

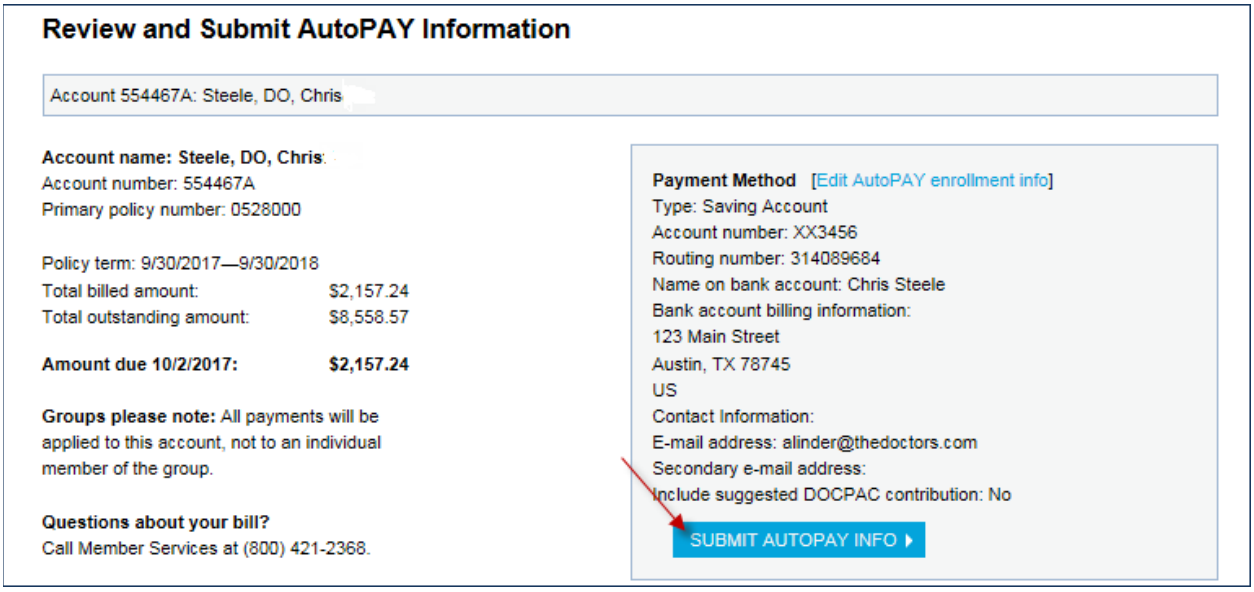


When you click *ENROLL IN AUTOPAY,* you begin the process to schedule automatic payments for your client using his or her e-check or credit card information.

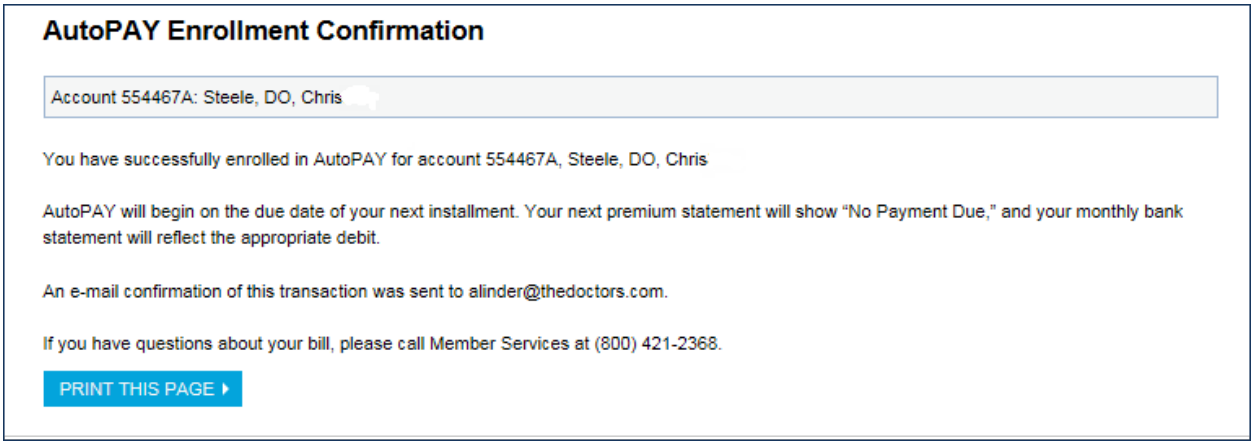
You will see the *Enroll in AutoPAY* screen. Enter the client's AutoPAY information, agree to the terms, and click *REVIEW PAYMENT INFO*.



Complete your review and click *SUBMIT AUTOPAY INFO* to complete the AutoPAY setup.



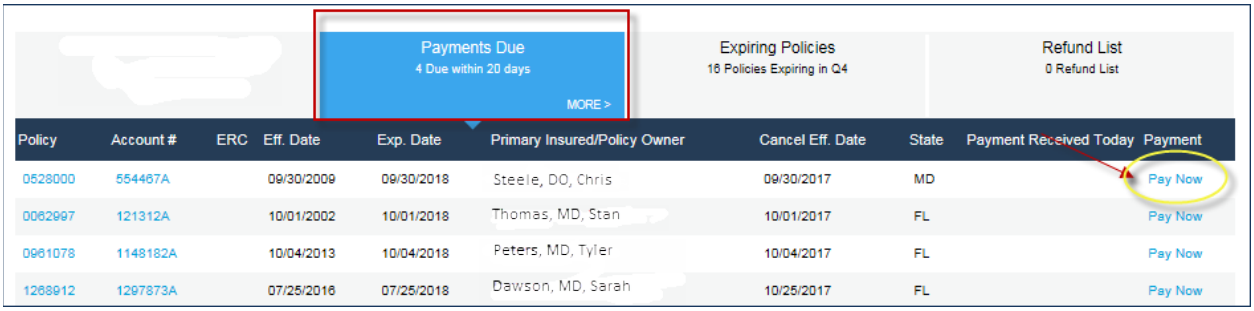
Once submitted, a message displays confirming the successful AutoPAY enrollment along with the e-mail address where the confirmation was sent.



Payment Due Lists – Enroll in AutoPAY

Another way to access the *Enroll in AutoPay* functionality is by selecting the *Payment Due* tab on your Agent/Broker Portal Dashboard.

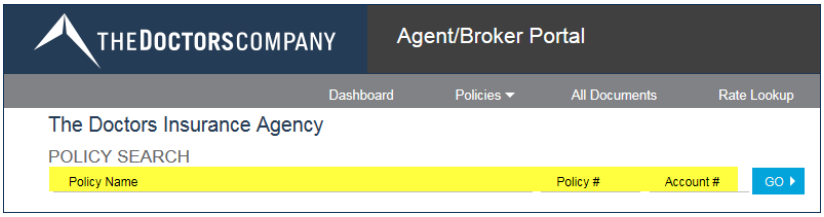
You will see the 20-day *Payment Due* list (by default), which has a new *Payment* column with *Pay Now* or *AutoPAY* listed.



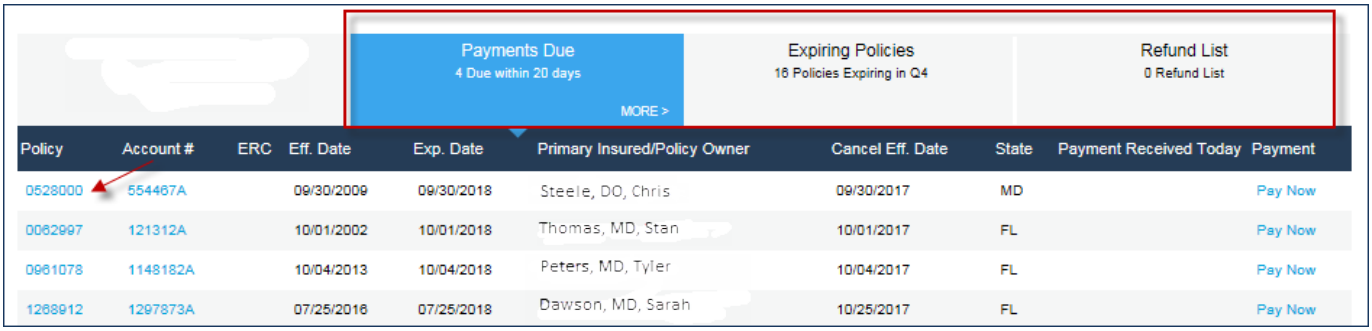
By clicking *AutoPAY*, you will see the *Billing and Payment* screen. Click *ENROLL IN AUTOPAY.* For more information on AutoPAY enrollment, see Enroll in AutoPAY.

Update or Cancel AutoPAY

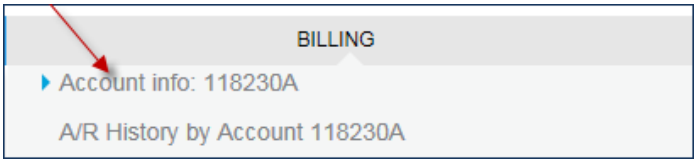
From your dashboard, enter the policy name, policy number, or account number in the *Policy Search* tool and click *GO*.



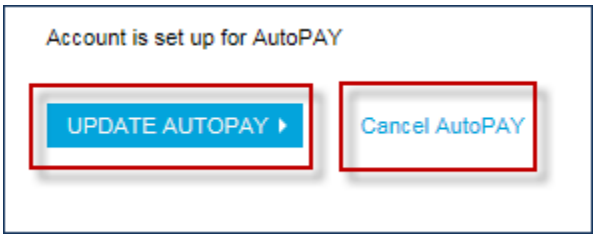
Or, click the policy number hyperlink on any list in the Agent/Broker Portal.



You will see the *Policy Summary* screen. Click the *Billing* tab and select the *Account Info* option from the drop-down list.

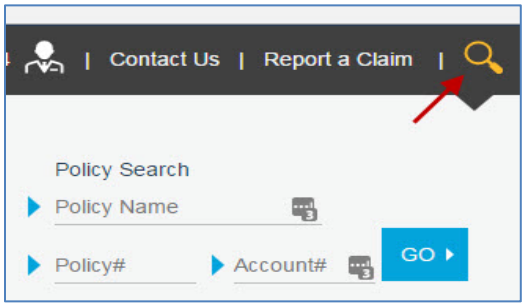


You will see the *Account Summary* screen. Click *UPDATE AUTOPAY* or *Cancel AutoPAY*.



Policy (Quick) Look-Up

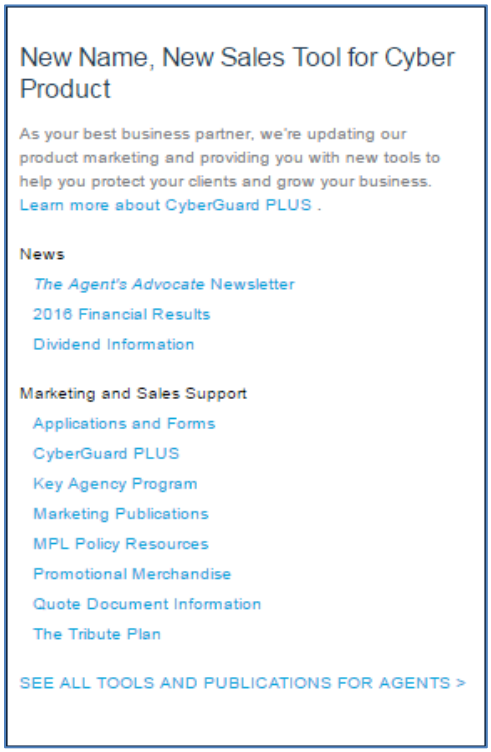
You can also find a policy quickly using our *Policy Look-Up* feature, which is located at the top, right corner of the Agent/Broker Portal.



Once a policy name, policy number, or policy account number is entered, the *Policy Summary* screen appears.

News and Marketing and Sales Support

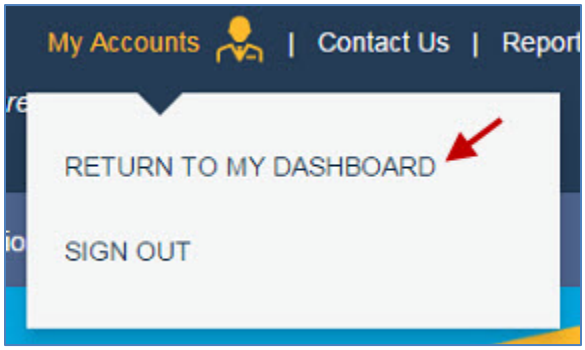
You can access news resources and marketing and sales support resources by clicking the appropriate hyperlinks.



For more resources, click *SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS.*

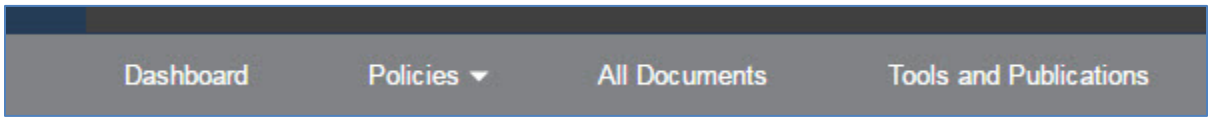
You will see the *Agents and Brokers* screen with access to all the *Tools and Publications* resources.

To return to the dashboard, click *My Accounts* > *Return to My Dashboard*.



Header

Another way to navigate is to utilize the header menu bar. Click a menu option and select from the menu's drop-down list.

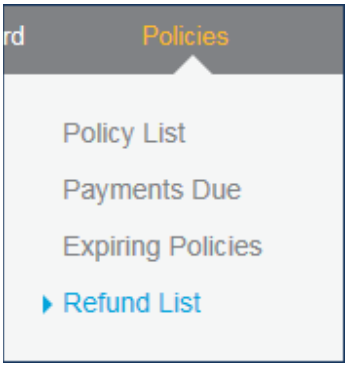


Header – Dashboard

Click *Dashboard* to return to the dashboard.

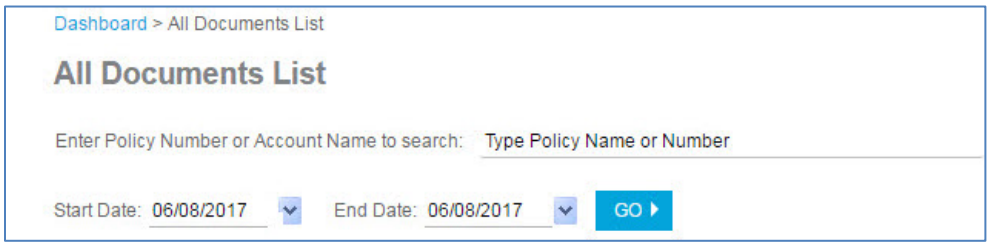
Header – Policies

Click *Policies* to see the following menu options.



Header – All Documents

Click *All Documents* to see the *All Documents List* screen:

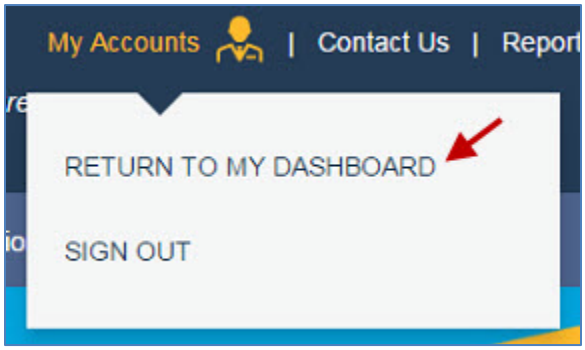


In the *All Documents List* screen, you can search for policy documents for all policies associated with your agency.

Header – Tools and Publications

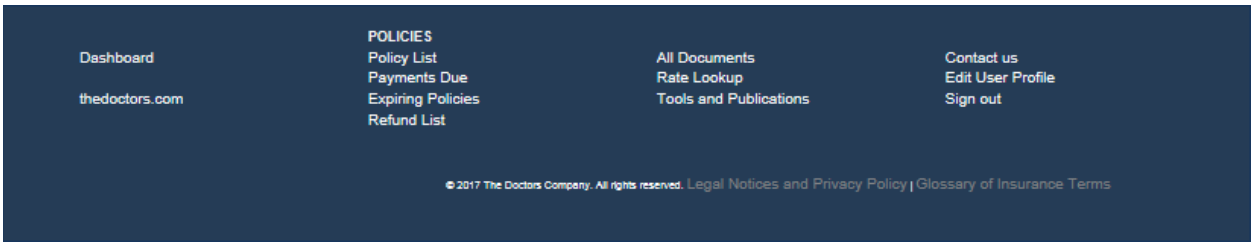
Click *Tools and Publications* to see the *Agents and Brokers* screen with access to the *Tools and Publications* resources.

To return to the dashboard, click *My Accounts* > *Return to My Dashboard*.



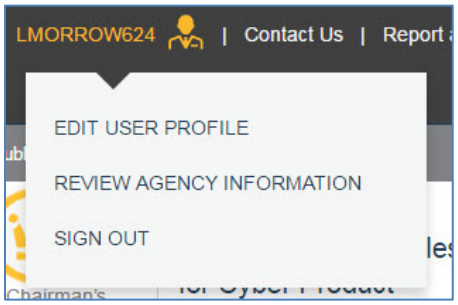
Footer

The footer is simplified to help you find the functionality you need within the Agent/Broker Portal.



User ID

Click your user ID to edit your user profile, review agency information, or to sign out of the portal.



Contact Information

To view The Doctors Company's contact information, click *Contact Us* at the top of the portal.
Note: The contact information has changed from Customer Service to Agency Support.

Agency Support Assistance

For more information or assistance with the Agent/Broker Portal, please contact Agency Support by sending e-mail to agencysupport@thedoctors.com, or by calling (800) 421-2368, extension 1391.