



Agent/Broker Portal

AMYLINDER | [Contact Us](#) | [Report a Claim](#) |

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

Joe Casey Insurance Agency, Inc.

POLICY SEARCH

Policy Name

Policy #

Account #

GO

[View All Policies](#)

BOOK OF BUSINESS

0

Awaiting Payment

20%

Paperless Documents

40%

AutoPAY

40%

CyberGuard PLUS

Quotes and Applications

0 Incomplete Requests

0 Not Started

MORE>

Payments Due

0 Due within 20 days

Expiring Policies

5 Policies Expiring in Q2

Refunds

0 Refunds

No quotes & applications to display.

A Chairman's Circle Agency

New Name, New Sales Tool for Cyber Product

As your best business partner, we're updating our product marketing and providing you with new tools to help you protect your clients and grow your business. [Learn more about CyberGuard PLUS](#).

News

- [The Agent's Advocate Newsletter](#)
- [2016 Financial Results](#)
- [Dividend Information](#)

Marketing and Sales Support

- [Applications and Forms](#)
- [CyberGuard PLUS](#)
- [Key Agency Program](#)
- [Marketing Publications](#)
- [MPL Policy Resources](#)
- [Promotional Merchandise](#)
- [Quote Document Information](#)
- [The Tribute Plan](#)

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

Agent/Broker Portal

Training Guide

TABLE OF CONTENTS

Introduction	3
What's New.....	3
Agent Dashboard.....	4
Agency Information.....	5
Policy Search	5
Policy Summary	5
Policy-Specific Policy Resources	7
Policy-Specific Billing Resources	7
Policy-Specific Document Resources.....	7
Breadcrumb Trail	8
Book of Business Bubbles	8
Awaiting Payment	8
Paperless Documents.....	9
AutoPAY	9
CyberGuard PLUS.....	10
Time Sensitive Policy Lists.....	11
Payments Due	11
Expiring Policies	13
Refund List	13
New: Agent Online Payments and Enroll in AutoPAY.....	13
Make a Payment.....	13
Payment Due Lists – Make a Payment	19
Enroll in AutoPAY	19
Payment Due Lists – Enroll in AutoPAY.....	23
Update or Cancel AutoPAY.....	23
Policy (Quick) Look-Up	24
News and Marketing and Sales Support	25
Header.....	27
Header – Dashboard.....	27
Header – Policies.....	27
Header – All Documents	28
Header – Tools and Publications	28
Footer	29
User ID	29
Contact Information.....	30
Agency Support Assistance	30

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.

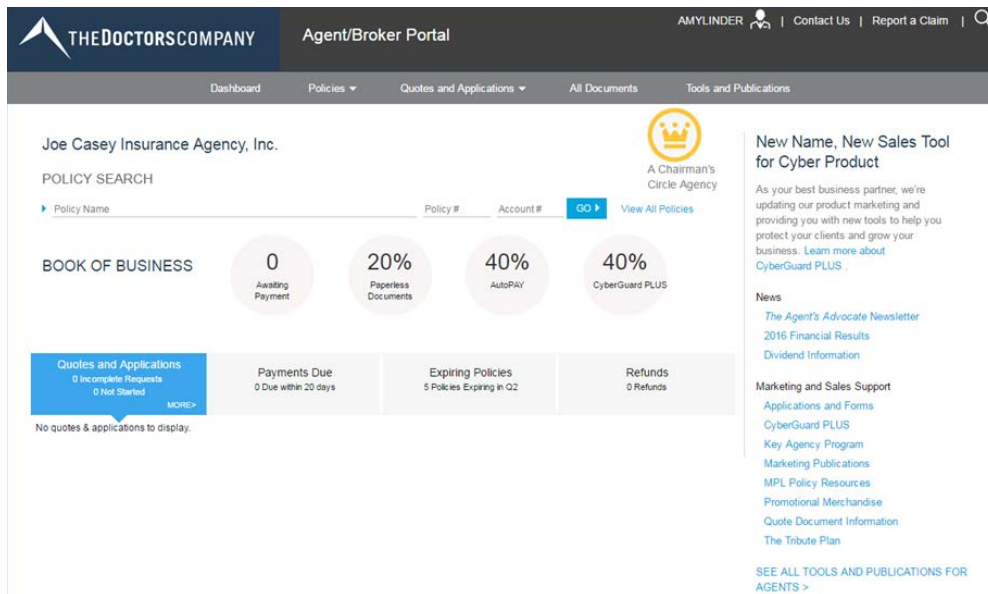
[Payment Due Lists – Make a Payment](#)

[Payment Due Lists – Enroll in AutoPay](#)

Agent Dashboard

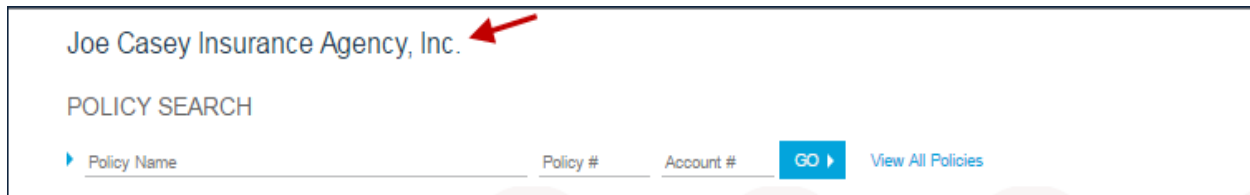
The most significant enhancement is the capability to quickly search and find the information you need by utilizing the new dashboard.


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.



Joe Casey Insurance Agency, Inc. 

POLICY SEARCH

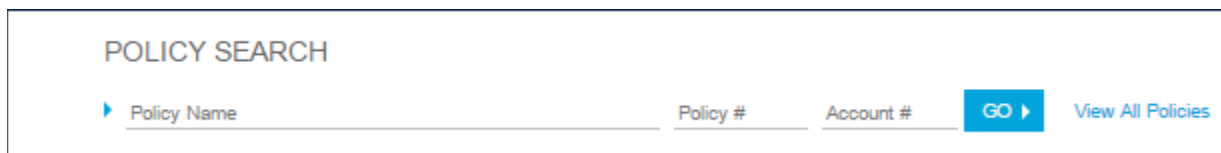
Policy Name Policy # Account # GO View All Policies

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.

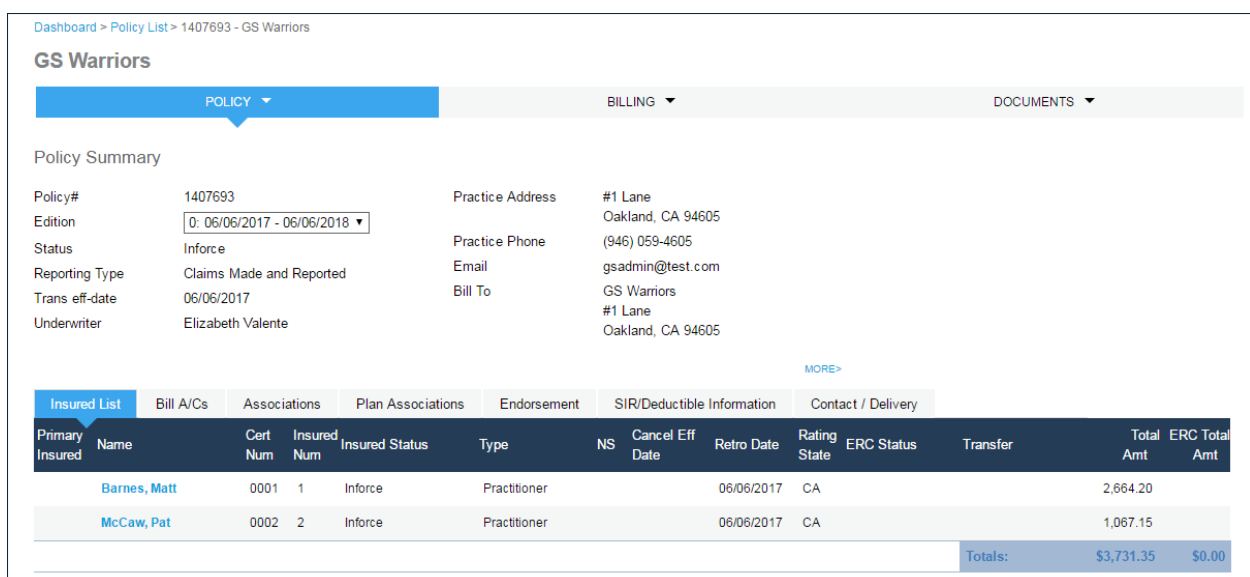


POLICY SEARCH

Policy Name Policy # Account # GO View All Policies

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.



Dashboard > Policy List > 1407693 - GS Warriors

GS Warriors

POLICY BILLING DOCUMENTS

Policy Summary

Policy# 1407693 Practice Address #1 Lane Oakland, CA 94605

Edition 0: 06/06/2017 - 06/06/2018 Practice Phone (946) 059-4605

Status Inforce Email gsadmin@test.com

Reporting Type Claims Made and Reported Bill To GS Warriors

Trans eff-date 06/06/2017 Underwriter Elizabeth Valente

#1 Lane Oakland, CA 94605

MORE>

Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact / Delivery							
Primary Insured	Name	Cert Num	Insured Num	Insured Status	Type	NS	Cancel Eff Date	Retro Date	Rating State	ERC Status	Transfer	Total Amt	ERC Total Amt
	Barnes, Matt	0001	1	Inforce	Practitioner			06/06/2017	CA			2,664.20	
	McCaw, Pat	0002	2	Inforce	Practitioner			06/06/2017	CA			1,067.15	
Totals:												\$3,731.35	\$0.00

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.

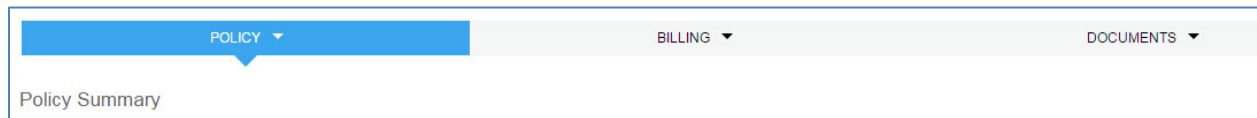
Policy	Account	Eff Date	Exp Date	Primary Insured/Policy Owner	Cancel Eff Date	State	Payment Rcvd To
0012345	206788A	01/01/2007	01/01/2018	House, MD, Gregory	06/01/2017	CA	
0023456	207890A	01/01/2008	01/01/2018	Pierce, MD, Ben	06/01/2017	CA	
0034567	208901A	01/01/2009	01/01/2018	Houlihan, MD, Margaret	06/01/2017	CA	
0045678	209012A	01/01/2010	01/01/2018	Kildare, MD, James	06/01/2017	AZ	
0056789	201234A	01/01/2011	01/01/2018	Casey, MD, Ben	06/01/2017	OR	

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.

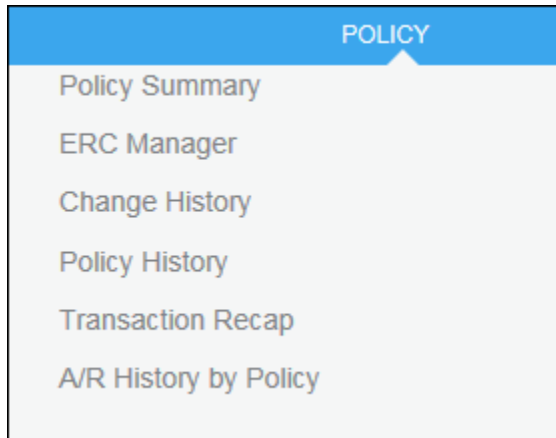
Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact / Delivery
Address Type	Name	Address	Document Delivery			
Primary Practice	GS Warriors Practice Phone:(946) 059-4605 Email:gsadmin@test.com	#1 Lane Oakland, CA 94605	Policy and Tribute Documents delivered here			
Bill To	GS Warriors Phone:(946) 059-4605 Email:gsadmin@test.com	#1 Lane Oakland, CA 94605	Billing Documents delivered here			

Policy-Specific Policy Resources

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

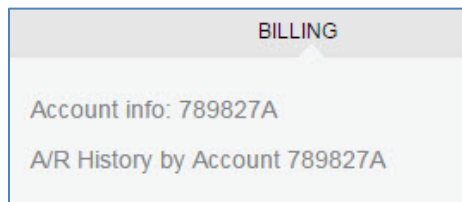


Click the *Policy* drop-down arrow to access all policy information (including what was previously provided via Policy Details):



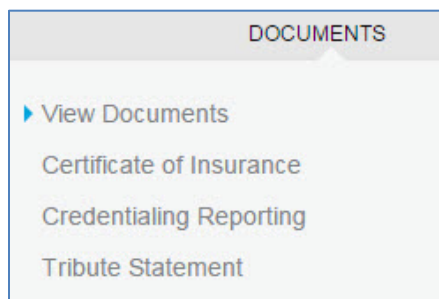
Policy-Specific Billing Resources

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



Policy-Specific Document Resources

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



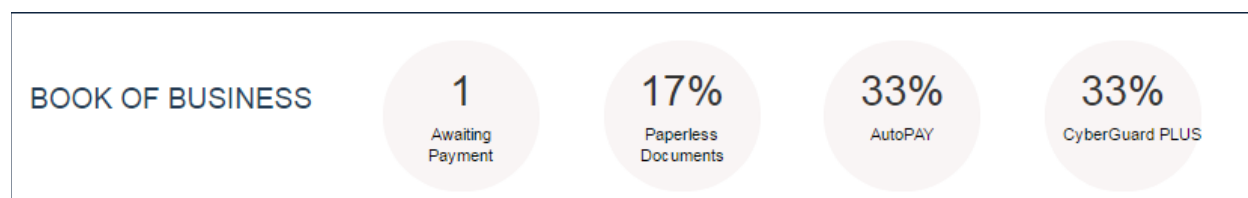
Breadcrumb Trail

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

[Dashboard](#) > [Payments Due](#)

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 image shows the 'Policy List' advanced search filter interface. It has a tabbed header with 'POLICY LIST' selected, followed by 'PAYMENTS DUE', 'EXPIRING POLICIES', and 'REFUNDS'. Below the tabs, there's a search bar with 'Active' selected and 'Policy Name' entered. To the right are fields for 'Policy #', 'Account #', and a 'GO' button. A 'View All Policies' link is also present. Below the search bar, there's a 'Hide Advanced Search' link. The filter section includes a checked box for 'Approved, awaiting payment' (highlighted in yellow), and three unchecked boxes: 'Policies due for renewal in 90 days', 'Insureds not enrolled in Paperless Documents delivery', 'Insureds not enrolled in AutoPAY', and 'Insureds not enrolled in CyberGuard PLUS coverage'.

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 screenshot shows the 'Policy List' dashboard with the 'POLICY LIST' tab selected. The 'Active' filter is expanded, showing a search bar for 'Policy Name' and a 'GO' button. Below the search bar, there are several filter options: 'Approved, awaiting payment' (unchecked), 'Policies due for renewal in 90 days' (checked), 'Insureds not enrolled in Paperless Documents delivery' (checked), 'Insureds not enrolled in AutoPAY' (unchecked), and 'Insureds not enrolled in CyberGuard PLUS coverage' (unchecked). A 'View All Policies' link is visible on the right.

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 screenshot shows the 'Policy List' dashboard with the 'POLICY LIST' tab selected. The 'Active' filter is expanded, showing a search bar for 'Policy Name' and a 'GO' button. Below the search bar, there are several filter options: 'Approved, awaiting payment' (unchecked), 'Policies due for renewal in 90 days' (checked), 'Insureds not enrolled in Paperless Documents delivery' (unchecked), 'Insureds not enrolled in AutoPAY' (checked), and 'Insureds not enrolled in CyberGuard PLUS coverage' (unchecked). A 'View All Policies' link is visible on the right.

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.

Policy List

POLICY LIST

PAYMENTS DUE

EXPIRING POLICIES

REFUNDS

Active

Policy Name

Policy #

Account #

GO

View All Policies

Hide Advanced Search

☐ Approved, awaiting payment

☒ Policies due for renewal in 90 days

☐ Insureds not enrolled in Paperless Documents delivery

☐ Insureds not enrolled in AutoPAY

☒ Insureds not enrolled in CyberGuard PLUS coverage

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

Payments Due 46 Due within 20 days MORE >				Expiring Policies 43 Policies Expiring in Q4		Refund List 0 Refund List			
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.

Payments Due

POLICY LIST

PAYMENTS DUE

EXPIRING POLICIES

REFUND LIST

Advance Notice of Cancellation for Non-Pay

Your search found 46 results.

20 Days

Policy #

Insured

Broker of Record Agency

GO

DOWNLOAD LIST

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

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.

Payments Due											
POLICY LIST			PAYMENTS DUE			EXPIRING POLICIES			REFUND LIST		
			4 Due within 20 days			16 Policies Expiring in Q4			0 Refund List		
			MORE >								
Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment		
0528000	554467A		09/30/2009	09/30/2018	Steele, DO, Chris	09/30/2017	MD		Pay Now		
0062997	121312A		10/01/2002	10/01/2018	Thomas, MD, Stan	10/01/2017	FL		Pay Now		
0961078	1148182A		10/04/2013	10/04/2018	Peters, MD, Tyler	10/04/2017	FL		Pay Now		
1268912	1297873A		07/25/2016	07/25/2018	Dawson, MD, Sarah	10/25/2017	FL		Pay Now		


- 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 policies 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

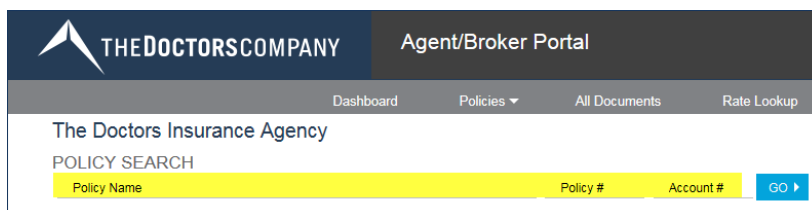
New online pay features now appear on your Agent/Broker Portal. You can make payments and sign up for AutoPAY on your client's behalf.

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*.



The screenshot shows the Agent/Broker Portal interface for The Doctors Insurance Agency. The top navigation bar includes 'Dashboard', 'Policies', 'All Documents', and 'Rate Lookup'. Below this, the 'POLICY SEARCH' section is highlighted in yellow. It contains three input fields: 'Policy Name', 'Policy #', and 'Account #', followed by a 'GO' button with a right-pointing arrow.

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*.

THE DOCTORS COMPANY Agent/Broker Portal LMORROW258 | Contact Us | Report a Claim

Dashboard Policies Quotes and Applications All Documents Rate Lookup Tools and Publications

Dashboard > Payments Due > 0062997 - Ajayi, MD, Akinyemi O. > Account:121312A > Billing and Payment

Billing and Payment

Account name: Ajayi, MD, Akinyemi O.
Account number: 121312A
Primary policy number: 0062997

Policy term: 10/1/2017—10/1/2018
Total billed amount: \$54,203.26
Total outstanding amount: \$215,045.36

Amount due 10/13/2017: \$54,203.26

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

Questions about your bill?
Call Member Services at (800) 421-2368.

Make a One Time Payment

☒ Pay amount due \$54,203.26

☐ Pay additional amount

☐ Pay total outstanding amount \$215,045.36

Voluntary DOCPAC contribution:
\$800.00

☐ Include DOCPAC

☐ Do not include DOCPAC

Total payment amount \$54,203.26

ENTER PAYMENT INFO

Make Recurring Payment with AutoPAY

AutoPAY is easy and saves you time and postage. With AutoPAY, your financial institution automatically deducts funds from your checking account to pay your installments. First-time enrollees will receive a one-time \$25 credit. Enroll today!

ENROLL IN AUTOPAY

Mail Your Payment

To make a payment by mail, please send your check to:

The Doctors Company
PO Box 52780
Phoenix, AZ 85072-2780

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*.

Enter Payment Information

Account 121312A: Ajayi, MD, Akinyemi O.

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

☒ E-check

☐ Credit card 

Bold fields are required.

Bank account type: **Personal checking** ▼

Bank routing number: 314089681

Bank account number: 123456

Reenter bank account number: 123456

Name on bank account: Test Test

Bank account billing information

First name: Test

Last name: Test

Address: 123 Main Street

City: Austin

Zip code: 78745

State: Texas

Contact information

Phone: (512) 222-2222

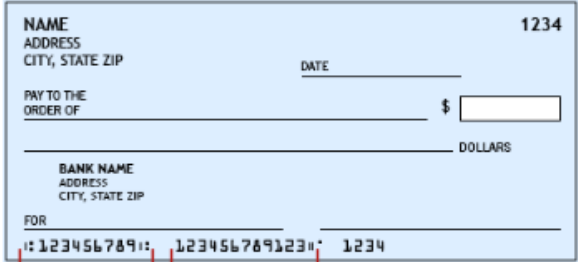
E-mail address: alinder@thedoctors.com

Secondary e-mail address:

A notification e-mail will be sent to each e-mail address.

☒ I agree to the [Terms of Agreement](#).

REVIEW PAYMENT INFO ▶



NAME ADDRESS CITY, STATE ZIP DATE 1234

PAY TO THE ORDER OF \$ DOLLARS

BANK NAME ADDRESS CITY, STATE ZIP

FOR

12345678910 1234567891234 1234

Bank Routing Number Bank Account Number

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*.

Review and Submit Payment Information

Account 121312A: Ajayi, MD, Akinyemi O.

Account name: Ajayi, MD, Akinyemi O.
Account number: 121312A
Primary policy number: 0062997

Policy term: 10/1/2017—10/1/2018
Total billed amount: \$54,203.26
Total outstanding amount: \$215,045.36

Amount due 10/13/2017: \$54,203.26

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

Questions about your bill?
Call Member Services at (800) 421-2368.

Payment Amount [\[Edit payment amount info\]](#)

Amount selected	\$54,203.26
Voluntary DOCPAC contribution	\$0.00
Total payment amount	\$54,203.26

Payment Method [\[Edit payment method info\]](#)

Type: Personal Checking Account
Account number: XX3456
Routing number: 314089681
Name on bank account: Test Test
Bank account billing information:
Test Test
123 Main Street
Austin, TX 78745
US
Contact Information:
Phone: (512) 222-2222
E-mail address: alinder@thedoctors.com
Secondary e-mail address:

[SUBMIT PAYMENT INFO ▶](#)

Cybersource test gateway:
<https://ics2wstesta.ic3.com/commerce/1.x/transactionProcessor>

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

Confirmation Screen

Payment Confirmation

Account 121312A: Ajayi, MD, Akinyemi O.

Thank you for your payment. Your transaction was successful and your payment information has been securely transmitted to The Doctors Company.

If you did not submit this payment, it may have been paid on your behalf by your agent or an authorized representative.

Cybersource test gateway: <https://ics2wstesta.ic3.com/commerce/1.x/transactionProcessor>

Payment method: Personal Checking Account
Total payment amount: \$54,203.26
Authorization number: 62739

An e-mail confirmation of this transaction was sent to alinder@thedoctors.com.

If you have questions, please call Member Services at (800) 421-2368.

PRINT THIS PAGE ▶

Confirmation E-mail

Payment Confirmation

Thank you for your payment. Your transaction was successful and your payment information has been securely transmitted to The Doctors Company.

If you did not submit this payment, it may have been paid on your behalf by your agent or an authorized representative.

Account name: Ajayi, MD, Akinyemi O.
Account number: 121312A
Primary policy number: 0062997

Cybersource test gateway: <https://ics2wstesta.ic3.com/commerce/1.x/transactionProcessor>

Payment method: Personal Checking Account
Total payment amount: \$54,203.26
Authorization number: 62739

If you have questions, please call Member Services at (800) 421-2368.


As a company founded and led by physicians, we are committed to keeping you informed and providing excellent service.

If you believe you received this message in error, please contact Member Services at (800) 421-2368.

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.



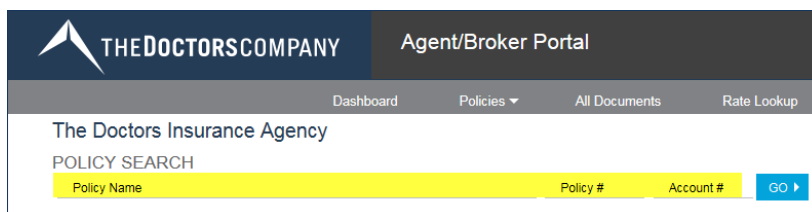
Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment
0528000	554467A		09/30/2009	09/30/2018	Steele, DO, Chris	09/30/2017	MD		Pay Now
0082997	121312A		10/01/2002	10/01/2018	Thomas, MD, Stan	10/01/2017	FL		Pay Now
0061078	1148182A		10/04/2013	10/04/2018	Peters, MD, Tyler	10/04/2017	FL		Pay Now
1268912	1297873A		07/25/2016	07/25/2018	Dawson, MD, Sarah	10/25/2017	FL		Pay Now

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*.



THE DOCTORS COMPANY Agent/Broker Portal

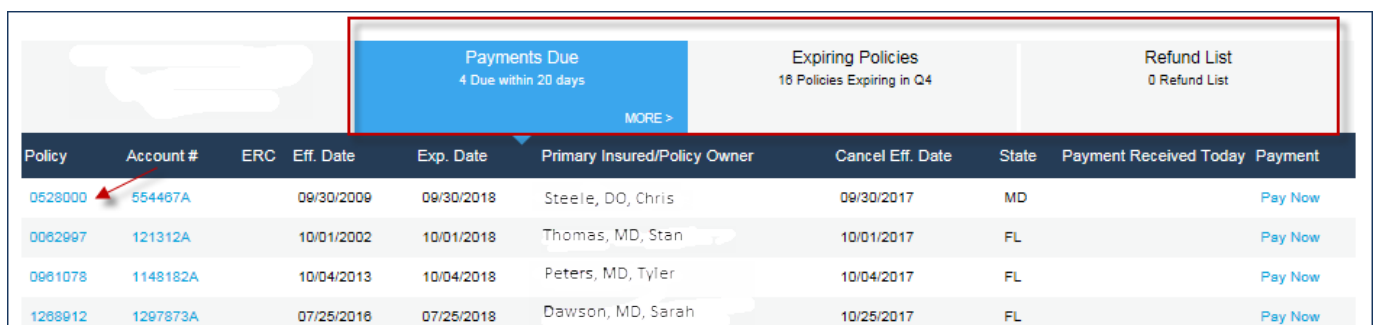
Dashboard Policies All Documents Rate Lookup

The Doctors Insurance Agency

POLICY SEARCH

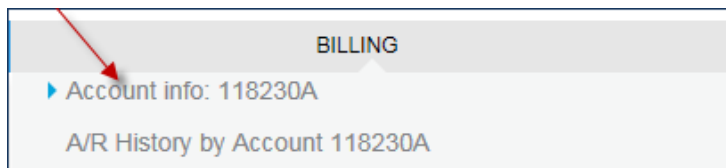
Policy Name Policy # Account # GO

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

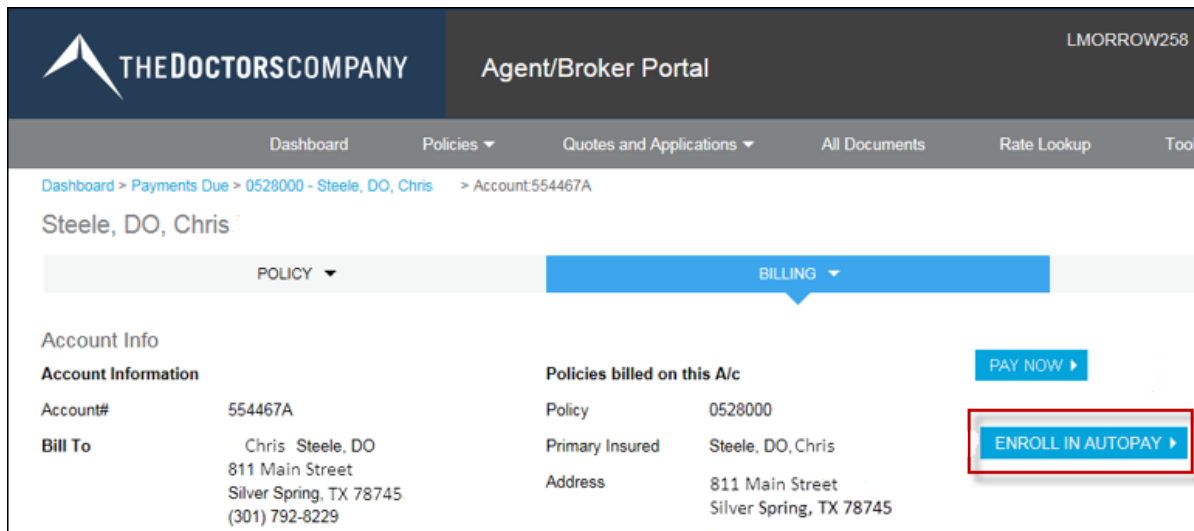


Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment
0528000	554467A		09/30/2009	09/30/2018	Steele, DO, Chris	09/30/2017	MD		Pay Now
0082997	121312A		10/01/2002	10/01/2018	Thomas, MD, Stan	10/01/2017	FL		Pay Now
0061078	1148182A		10/04/2013	10/04/2018	Peters, MD, Tyler	10/04/2017	FL		Pay Now
1268912	1297873A		07/25/2016	07/25/2018	Dawson, MD, Sarah	10/25/2017	FL		Pay Now

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*.

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

Bold fields are required.

Payment account type:

Bank account type:

Bank routing number:

Bank account number:

Reenter bank account number:

Name on bank account:

Bank account billing information

Address:

City:

Zip code:

State:

Contact information

E-mail address:

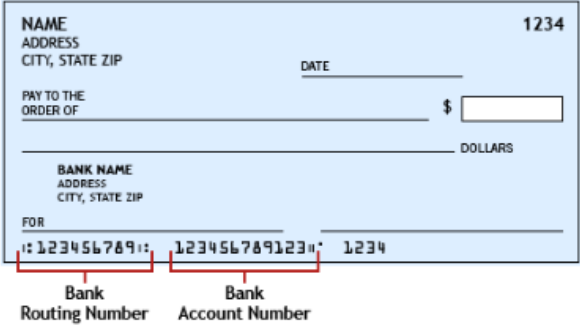
Secondary e-mail address:

A notification e-mail will be sent to each e-mail address.

☐ I have chosen to include the suggested **DOCPAC** contribution of \$37.50 per installment. I understand that DOCPAC amounts may vary as policy conditions change.

☐ I agree to the [Terms of Agreement](#).

REVIEW PAYMENT INFO



The diagram shows a check layout with the following labels:

- NAME** (top right)
- ADDRESS** (top left)
- CITY, STATE ZIP** (top left)
- DATE** (top right)
- PAY TO THE ORDER OF** (middle left)
- \$** (middle right)
- DOLLARS** (middle right)
- BANK NAME** (bottom left)
- ADDRESS** (bottom left)
- CITY, STATE ZIP** (bottom left)
- FOR** (bottom left)
- 123456789101112345678910111234** (bottom)
- Bank Routing Number** (bottom left)
- Bank Account Number** (bottom right)

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

Review and Submit AutoPAY Information

Account 554467A: Steele, DO, Chris

Account name: Steele, DO, Chris
Account number: 554467A
Primary policy number: 0528000

Policy term: 9/30/2017—9/30/2018
Total billed amount: \$2,157.24
Total outstanding amount: \$8,558.57

Amount due 10/2/2017: **\$2,157.24**

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

Questions about your bill?
Call Member Services at (800) 421-2368.

Payment Method [\[Edit AutoPAY enrollment info\]](#)
Type: Saving Account
Account number: XX3456
Routing number: 314089684
Name on bank account: Chris Steele
Bank account billing information:
123 Main Street
Austin, TX 78745
US
Contact Information:
E-mail address: alinder@thedoctors.com
Secondary e-mail address:
Include suggested DOCPAC contribution: No

SUBMIT AUTOPAY INFO

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

AutoPAY Enrollment Confirmation

Account 554467A: Steele, DO, Chris

You have successfully enrolled in AutoPAY for account 554467A, Steele, DO, Chris

AutoPAY will begin on the due date of your next installment. Your next premium statement will show "No Payment Due," and your monthly bank statement will reflect the appropriate debit.

An e-mail confirmation of this transaction was sent to alinder@thedoctors.com.

If you have questions about your bill, please call Member Services at (800) 421-2368.

PRINT THIS PAGE

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.

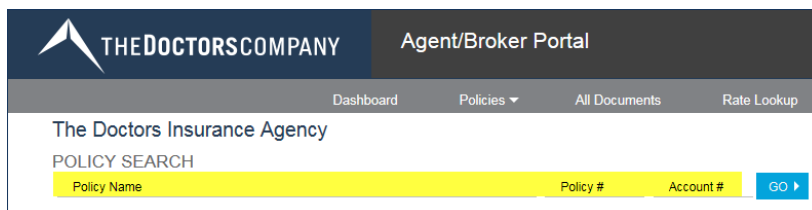


Payments Due 4 Due within 20 days MORE >									
Expiring Policies 16 Policies Expiring in Q4									
Refund List 0 Refund List									
Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment
0528000	554467A		09/30/2009	09/30/2018	Steele, DO, Chris	09/30/2017	MD		Pay Now
0062997	121312A		10/01/2002	10/01/2018	Thomas, MD, Stan	10/01/2017	FL		Pay Now
0961078	1148182A		10/04/2013	10/04/2018	Peters, MD, Tyler	10/04/2017	FL		Pay Now
1268912	1297873A		07/25/2016	07/25/2018	Dawson, MD, Sarah	10/25/2017	FL		Pay Now

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*.



THE DOCTORS COMPANY Agent/Broker Portal

Dashboard Policies All Documents Rate Lookup

The Doctors Insurance Agency

POLICY SEARCH

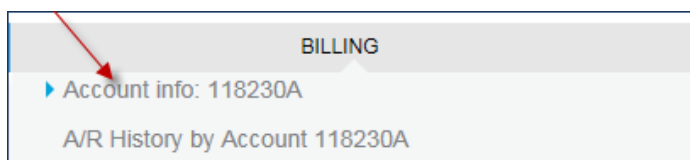
Policy Name Policy # Account # [GO](#)

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

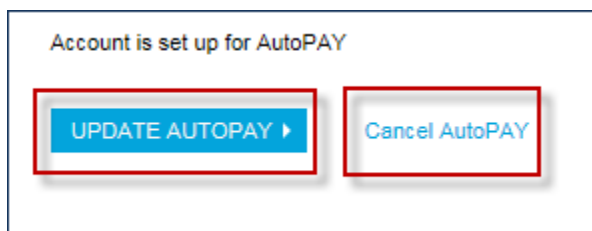


Payments Due 4 Due within 20 days MORE >									
Expiring Policies 16 Policies Expiring in Q4									
Refund List 0 Refund List									
Policy	Account #	ERC	Eff. Date	Exp. Date	Primary Insured/Policy Owner	Cancel Eff. Date	State	Payment Received Today	Payment
0528000	554467A		09/30/2009	09/30/2018	Steele, DO, Chris	09/30/2017	MD		Pay Now
0062997	121312A		10/01/2002	10/01/2018	Thomas, MD, Stan	10/01/2017	FL		Pay Now
0961078	1148182A		10/04/2013	10/04/2018	Peters, MD, Tyler	10/04/2017	FL		Pay Now
1268912	1297873A		07/25/2016	07/25/2018	Dawson, MD, Sarah	10/25/2017	FL		Pay Now

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

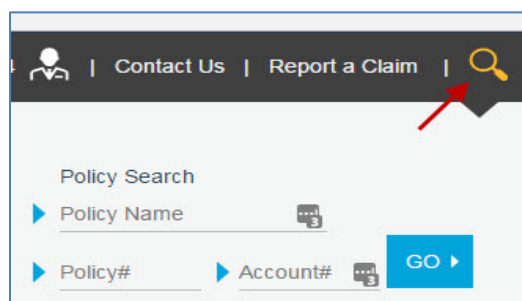


You will see the *Account Summary* screen. Click *UPDATE AUTOPAY* or *Cancel AutoPAY*.



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.

New Name, New Sales Tool for Cyber Product

As your best business partner, we're updating our product marketing and providing you with new tools to help you protect your clients and grow your business. [Learn more about CyberGuard PLUS .](#)

News

- [The Agent's Advocate Newsletter](#)
- [2016 Financial Results](#)
- [Dividend Information](#)

Marketing and Sales Support

- [Applications and Forms](#)
- [CyberGuard PLUS](#)
- [Key Agency Program](#)
- [Marketing Publications](#)
- [MPL Policy Resources](#)
- [Promotional Merchandise](#)
- [Quote Document Information](#)
- [The Tribute Plan](#)

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

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.



The nation's largest physician-owned medical malpractice insurer

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

[About Us](#)
[Products](#)
[Risk Management](#)
[Education and CME](#)

NO ONE PAYS GREATER TRIBUTE TO DOCTORS.

LEARN MORE >



HIGHEST TRIBUTE AWARD PAID TO DATE: \$138,599

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.

Tools and Publications for Agents

News

- [The Agent's Advocate Newsletter](#)
- [2016 Agents Meeting](#)
- [2016 Financial Results](#)

Marketing and Sales Support

- [Applications and Forms](#)
- [Agent Marketing Program](#)
- [Co-op Marketing Program for Chairman's Circle and Key Agencies](#)
- [Dividend Information](#)

Marketing Publications Print Order Form

Marketing Publications for Download

- [Promotional Merchandise](#)
- [Regional Agent Presentations](#)
- [Underwriting and Business Development Contacts](#)
- [Social Media Resource Center](#)
- [2017 Key Agency Program](#)
- [Guide to Online Services for Members](#)

Coverage Information

- [New Quote Document](#)
- [Updated MPL Policy](#)
- [Dental Policy](#)
- [CyberGuard](#)
- [CyberGuard for Healthcare Facilities](#)
- [CyberGuard PLUS](#)
- [Select Premium Credit Programs](#)
- [The Tribute Plan](#)

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 Area—Web Site Training Guide](#).

Prospective Agents and Brokers

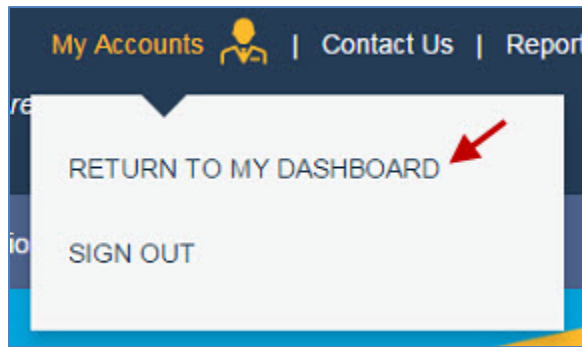
If you are an established medical malpractice agent or broker representing physicians, [we'd like to hear from you.](#)

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.

An Unparalleled Sales and Retention Tool

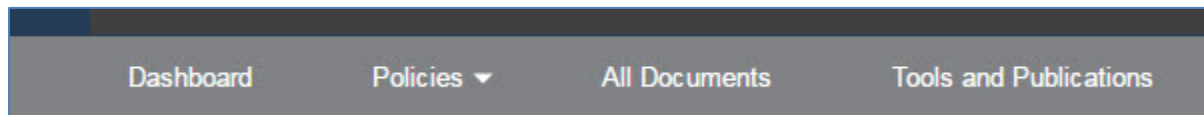
The Tribute® Plan is an unrivaled benefit that provides doctors with a significant financial award when they retire from the practice of medicine. How significant?

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.

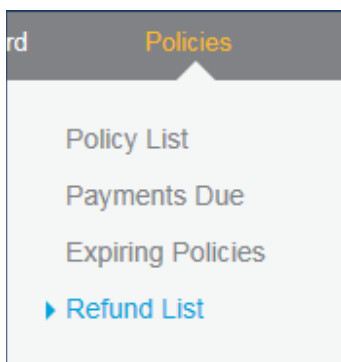


Header – Dashboard

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:

Dashboard > All Documents List

All Documents List

Enter Policy Number or Account Name to search:

Start Date: End Date:

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.

**THE DOCTORS COMPANY**
The nation's largest physician-owned medical malpractice insurer

My Accounts  | Contact Us | Report a Claim | 

About Us | Products | Risk Management | Education and CME

NO ONE PAYS GREATER TRIBUTE TO DOCTORS.

[LEARN MORE](#)



NUMBER OF TRIBUTE PLAN AWARD RECIPIENTS: 5,800

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.



Region	Underwriting Unit
Northwest	Northwest Underwriting Unit
West	West Underwriting Unit
Southwest	Southwest Underwriting Unit
South	South Underwriting Unit
Midwest	Midwest Underwriting Unit
North	North Underwriting Unit
East	East Underwriting Unit

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.

Tools and Publications for Agents

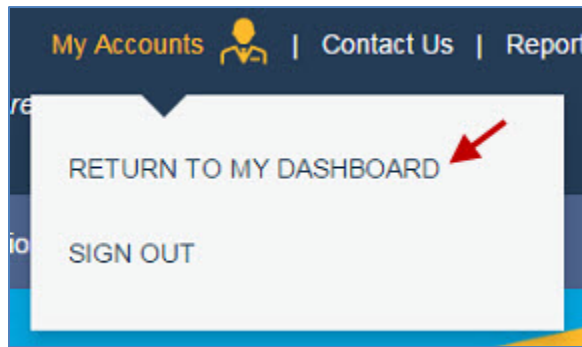
News

- [The Agent's Advocate Newsletter](#)
- [2017 Agents Meeting](#)
- [2016 Financial Results](#)

Marketing and Sales Support

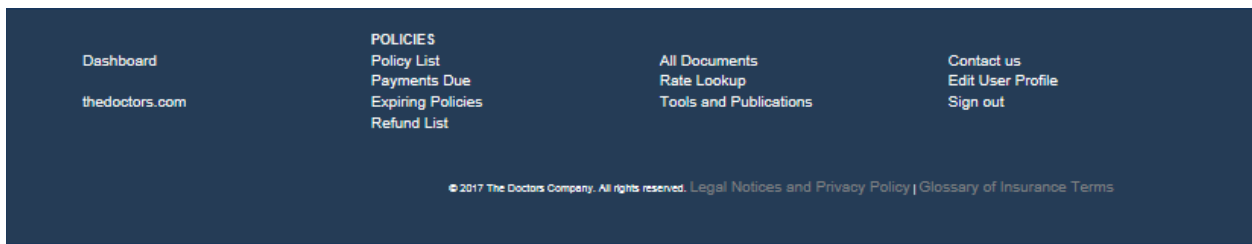
- [Applications and Forms](#)
- [Agent Marketing Program](#)
- [Co-op Marketing Program for Chairman's Circle and Key Agencies](#)
- [Dividend Information](#)
- [Information for New York Agents](#)

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



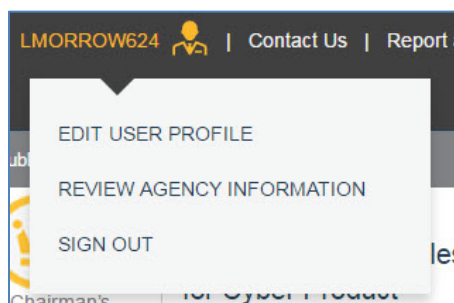
Footer

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.