

The Doctors Company Healthcare Risk Advisors TDC Specialty Underwriters Medical Advantage

Agent Website Portal

User Guide

The Doctors Company					My Account Contact Us Report a Claim 🔍
	Policy Search	Policy List	All Documents	Tools and Publications	
ACME Insurance Agency 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 <i>The Agent's Advocate</i> 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 SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS
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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 Portal. Doing so helps position The Doctors Company for the expansion and efficient integration of future business processes and technology innovations.

Agent Portal Updates

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



As of November 22, 2021, the following updates and new features are listed:

Latest Updates

Listed below are the latest updates for the Agent/Broker Portal. If you have any questions or need assistance, please contact Agency Support at (800) 421-2368, extension 1391, or agencysupport@thedoctors.com.

11/22/21—Credentialing reports access: Credentialing reports are currently unavailable for download. To access these documents, please call Member Services at (800) 421-2368.

9/17/21—E-Doc email and policy document access: We are aware that some agents are not receiving e-Doc emails for certain policies that begin with "26." As a result, policy documents for those policies are not found when the user clicks on All Documents. As we work to fix this issue, you can locate the missing policy documents by clicking on Policies, and then Policy List. Once the policy list is displayed you can click on the policy number, of the policy you seek, to see the Policy Summary screen. You can then access policy documents by clicking on Documents and then View Documents.

Newly Installed Features

Listed below are the latest features added to the agent portal. If you have any questions or need assistance, please contact Agency Support at (800) 421-2368, extension 1391, or agencysupport@thedoctors.com.

10/20/21—Policies sorted by Active/Inactive account status: Within the **Billing screen** in the **A/R History by Account section**, the **Account Information drop-down menu** now sorts policies by Active (premium is due) or Inactive (premium is not due) account status. The active accounts where premium is due are sorted at the top of the drop-down menu with all inactive accounts that are current on premium payments grouped together underneath the active policies.

9/21/21—The TDC Group Merchandise Store: <u>The TDC Group Merchandise Store</u> recently underwent a site refresh, so you may notice a slight change in the site's appearance and checkout process. Checking out with your order(s) has been simplified to just a couple of steps and you now have more shipping options. A <u>user guide</u> is available to address questions about ordering merchandise.

9/17/21—Cancellation for non-payment list: an Advance Notice of Cancellation Policy for Non-Pay list is available to help you 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. This list can be downloaded and saved as an Excel worksheet.

9/17/21—Document download issue: The document download process that was failing when multiple large files or policy packets were selected for download has been fixed.

9/17/21—Faster load times: For complex accounts and large policies that contain more than 200 insured members, you will see faster load times for the Policy Overview page.

9/17/21—New information added on A/R History screen: Agents can now search for account numbers within a newly added drop-down menu. We have also added a Payment Method section that shows the last four digits of the bank account, debit card, or credit card associated with the account number if the insured member is enrolled in AutoPAY. In addition, an Equity Date section has been added to the A/R History screen.

9/17/21—On-demand certificates of insurance: Agents can now generate on-demand certificates of insurance for all policies with the exception of complex accounts or policies that are limited based on their profile. On-demand credentialing reports and Tribute® Plan statements for some policies may not be available at this time.

When you are accessing on-demand documents, in some cases the on-demand document options will appear in a new (separate) tab in your browser; in other cases, they will come up on the same screen. This scenario will occur as we migrate policies from our legacy system to our new technology platform. Once all policies are migrated, the on-demand options will come up on the same screen.

If you cannot generate on-demand documents for a policy, contact Member Services at (800) 421-2368.

8/17/21—Payments Due list: To help you track policies that have payments due, a Payments Due list is now available. The new Payments Due list will include payments due in 5, 10, and 20 days and the expected payment method. This list can be downloaded and saved as an Excel worksheet.

7/6/21—E-Doc email and policy document access: Access to policy documents through e-Doc emails has been simplified. When you click on the link to the documents in the email received, you will no longer have to search for the documents by the associated policy-the

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documents will be listed on the **All Documents screen** where the link takes you. Here are <u>detailed instructions</u> for accessing policy documents through e-Doc emails.

7/6/21—Carrier designation has been moved: To make it easier to see the carrier of your clients' policies (i.e., The Doctors Company, The Doctors Company Risk Retention Group, and later, Hospitals Insurance Company), we have placed the carrier name in a more prominent location towards the top of the **Policy Summary screen**.

4/29/21—Online commission statements: Commission statements will continue to be emailed, but now agencies can designate an "Agency Accountant" who has access to retrieve and download future commission statements. Please contact Agency Support to create or enable access to the commission dashboard.

4/27/21—Policy list with download functionality: You can now export the Policy List by clicking **Policy List** from the blue menu bar, then the **Download List** button. The full policy list will export to a CSV file, which you can save as an Excel Workbook File.

4/2/21—Update to new dentist members' account password rules: The online dental platform password rules have changed to conform to increased security requirements. When an agent completes an application for a dentist client and clicks on the **Generate Quote button** and then the **Email Quote button**, two emails will be sent to the agent's dentist client: (1) an email providing temporary password criteria with instructions to use the password for accessing their new member account in the Member Portal; (2) an email with the premium amount quoted and the option to make a payment.

Agency Support

For overall questions, contact Agency Support at <u>agencysupport@thedoctors.com</u> or call (800) 421-2368, extension 1391. If you would like personalized training for your agency, you can <u>schedule training</u> that will be made available via a WebEx session.

Sign In

Access <u>www.thedoctors.com</u> and click Sign In.

The Doctors Compa TDCgROUP	any	GET A QUOTE → Sign In Contact Us Report a Claim Q
ou see the <i>Sign In</i> sci	reen:	
Sign In		
User ID	Forgot ID?	New to The Doctors Company?
Password	Forgot password?	REGISTER ACCOUNT >
s	IGN IN 🕨	

Register Account

If you do not have an activated User ID and Password, click Register Account.

You see the Register Your Online Member Account screen.



Click I am an agent or broker.

You see the *Register for an Account* screen:

in a training	
Daniel	E
Last name	
Jones	
Agency name	
ACME Insurance	
Annual and a stand	
Agency number (optional)	
Agency Role Agent/broker Support Staff	
Agency Role Agent/broker Support Staff Phone	
Agency Role Agent/broker Support Staff Phone 707-123-4567	
Agency humber (optional) 400123 Agency Role Agent/broker To7-123-4567 Are you registering as a Chubo Dental Pr participant?	ogram
Agency humber (optional) 400123 Agency Role Agent/broker To7-123-4567 Are you registering as a Chubo Dental Pr participant? Yes No	ogram
Agency Role Agent/broker Support Staff Phone 707-123-4567 Are you registering as a Chubb Dental Pr participant? Yes No Email Address	ogram

Complete the Personal Details.

Regarding the question "Are you registering as a Chubb Dental Partnership participant."

Click **Yes** if you are a participant, Click **No** if not.

ID				
				2
	ID	ID	ID	ID

If you click Yes, you are prompted to enter your Chubb Web Login ID (with correct case sensitivity).

Click Send Verification Code.

rirst name	
Daniel	đ
Last name	
Jones	
Agency name	
ACME Insurance	
Agency number (optional)	
400123 Agency Role O Agent/broker Support Staff	
400123 Agency Role O Agent/broker Support Staff Phone	
400123 Agency Role Agent/broker Support Staff Phone 707-123-4567	
400123 Agency Role Agent/broker Support Staff Phone 707-123-4567 Are you registering as a Chubb Dental Pr participant?	ogram
400123 Agency Role Agent/broker Support Staff Phone 707-123-4567 Are you registering as a Chubb Dental Pr participant? Yes No	ogram
400123 Agency Role Agent/broker Support Staff Phone 707-123-4567 Are you registering as a Chubb Dental Pr participant? Yes No Email Address	ogram

You see the **Verification code** field.

mail Addr	ess
mt@ma	linator.com
erification	code
i i	
	VERIEY CODE ►
	VERIFY CODE >

Agency Support will process the Verification Request. Once processed, an email is sent with a Verification Code.

From the email received, enter 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:

Create password	
	ø
Confirm password	
	ø
Select a security questi	~
Your answer	read and agree to the Terms of U

Complete this screen.

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

When completed, click **Terms of Use** to read, and then click the **I certify that I have read and agree to the Terms of Use** check box.

Now click Next.

Agency Support will process the Online Account Request. Once processed, an email is sent to you with notification that your account access is activated.

Once you sign in, you see the Agent Website Portal Landing Page.

The Doctors Company					My Account Contact Us Report a Claim 🤇
	Policy Search	Policy List	All Documents	Tools and Publications	
ACME Insurance Agency POLICY SEARCH CO 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 <i>The Agent's Advocate</i> 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 SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS
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For help to access the Agent Portal, send an email to <u>agencysupport@thedoctors.com</u> or call (800) 421-2368, extension 1391.

User ID Retrieval

To Retrieve a forgotten user ID, click Forgot ID and enter your email. The account ID will be emailed to you.

Retrieve User ID
If you forgot your User ID, please enter your 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.

Forgot your password?
If you forgot your password, please enter your email address.
Email address
SEND VERIFICATION CODE >

Landing Page

Once you sign in, you see the Landing Page.

					My Account Contact Us Report a Claim 🔍
	Policy Search	Policy List	All Documents	Tools and Publications	
ACME Insurance Agency 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 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 SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS
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Note: To return to the Landing Page from other Agent Portal screens (Web pages) click The Doctors Company TDC Group logo as shown below.



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 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 LookU	p All Docume	nts Too	Is and Publications
All Docume	nts				
Search:					
Search by Policy Number,	Policy Name, or Doci	ument Name.			
Show these document typ	Des:				
Policy Billing	Tribute	Additional			
From: 11/19/2021	To: 11/19/2021				
GO ►					
Name Name			Policy Name	Policy	Delivery Date
Offer of Ins	surance		MOLLY MALLARD	2640704	11/19/2021
i¶ √ Page	1 of 1	⊳ l a	C	Per Pa	ge 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).



Policy List

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

The Doctors Company TDCgROUP				
	Policy Search	Policies 🗸	All Documents	Tools and Publications
ACME Insurance Agency POLICY SEARCH	Policy List Payments Due Cancelled Policies	5		

You see the following list:

Policy	List						
Your search ca	in only return 1000 results. Please narrow your search.						
Active	Ψ	GO 🕨 DOWNLO	AD LIST 🕨				
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

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

You can click the **Active** drop-down list ...

A	ctive -
	Active & Inactive
	Active
	Inactive
	0930426

- ... to change the policy list display to show:
 - Active & Inactive,
 - Active (default value), or
 - Inactive.

Payments Due (Advanced Notice of Payment Due)

Click **Policies > Payments Due** to see **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.

The Doctors Company TDCgROUP				
	Policy Search	Policies 🗸	All Documents	Tools and Publications
ACME Insurance Agency POLICY SEARCH	Policy List Payments Due Cancelled Policie	s		

You see the following list:

Payments Due						
·						
Advance Notice of Payment Due						
Your search found 5 results.						
20 Days 🔻	Broker of Record Agency (Select) ▼ GO > DOWNLOAD 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	Payment
0062105 A/R 120365A	01/15/2002 01/15/2022 Classi, MD, RoseMarie	09/26/2021	GA	Standard	ACH	PAY NOW

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

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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.

The Doctors Company TDCgROUP				
	Policy Search	Policies 🗸	All Documents	Tools and Publications
ACME Insurance Agency POLICY SEARCH	Policy List Payments Due Cancelled Policie	s 👉		

You see the following list:

Cance	elled Policies						
Advance No Your search	tice of Cancellation for Non-Pay found 8 results.						
10 Days	▼ Broker of Record Agency (Select) ▼ Go ▶ DOWNLOAD LIST ▶						
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

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

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

The Doctors Company					My Account Contact Us Report a Claim Q
	Policy Search	Policy List	All Documents	Tools and Publications	
ACME Insurance Agency POLICY SEARCH					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 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
	2021 The Doctors Company. Al	rights reserved. Le	egal Notices and Privacy	Policy i Do Not Sell My Personal Inform	SEE ALL TOOLS AND PUBLICATIONS FOR AGENTS

You see the All Documents screen.

Policy Search	Policies 🔻	Rate LookUp	All Documents	; Tool	s and Publications	
All Docume	nts					
Search:						
earch by Policy Number,	Policy Name, or Doo	cument Name.				
Show these document typ	Des:					
Policy Billing	Tribute	Additional				
From: 11/19/2021	To: 11/19/2021					
GO 🕨						
Name		Polic	cy Name	Policy	Delivery Date	
Offer of Ins	surance	MO	LLY MALLARD	2640704	11/19/2021	
Page	1 of 1	N C		Per Pag	ge Options 25	•

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).

DOWNLOAD SELECTED >

Policy Search

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



Enter the policy number or name in the Policy Search field and click **GO**. You see the search results:

Policy List					
Your search found 1 results.					
Active & Inactive	Morrow	GO ► DOWNLOAD LIST ►			
Policy # Name	Address	City	State	ZIP Effective Date St	tatus
0054321 Morrow, MD, Ozzy D.	326 Mainsail Drive	Cotati	CA	94928 07/01/2020 Ac	ctive

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

Policy Search > Policy List > 0054321 - Morrow, MD, Ozz	y D.			
Morrow, MD, Ozzy D.				
POLICY 🔻		BILLING 🔻	DOCUMENTS 🔻	
Policy Summary				
Policy #	0054321	Primary Practice	326 Mainsail Drive	
Edition	19: 01/15/2021 - 01/15/2022	Ŧ	Rohnert Park, CA 94928	
Status	Inforce	Practice Phone	(707) 123-4567	
Reporting Type	Claims Made and Reported	Email	gooddog@morrow.com	
Transaction Effective Date	01/15/2021	Bill To	Ozzy D. Morrow, MD	
Underwriter	Angela L. More		326 Mainsail Drive Rohnert Park, CA 94928	
	AMore@thedoctors.com			
	(904) 360-3042	Carrier	The Doctors Company	
				1
			MC	ORE >
Insured List Bill A/Cs Associations	Plan Associations Endorsement SIR/Deductible Info	rmation Contact/Delivery		

To see more policy information, click **MORE**.

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	678 - ACME Insurance Agency	Commission	10.00%
Servicing Agent	678 - ACME Insurance Agency		
			<u>LESS <</u>

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

Policy Drop-Down Resources

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

Morrow, MD, Ozzy D.		
POLICY 🔻	BILLING 🔻	DOCUMENTS 🔻

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



You see the *View Documents* screen:

View Doc	uments			
Show the Policy	se document / I Billin	iypes: g 🗹 Tribute 🗹 Additional		
From: 5/	/18/2020	To: 5/18/2021		
G0 ►				
		Name	Policy	Delivery Date
•		Premium Statement <table-cell-columns></table-cell-columns>	0054321	05/17/2021
		Premium Statement	0054321	02/16/2021

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.

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

-	Premium Stateme	nt
		Premium Statement
		DOCPAC Flier
		AutoPAY Flier
		Tribute Flier

You can then click on the "Premium Statement" document to save and open as a PDF or, by clicking the appropriate checkbox, you can download the:

- Premium Statement "Packet" (see **blue arrow**)
- Premium Statement document (see red arrow)

 Premium Stateme	nt
→ 🗆	Premium Statement
	DOCPAC Flier
	AutoPAY Flier
	Tribute Flier

... and then scroll down and click **DOWNLOAD SELECTED** to save as a *.ZIP file (which you can later open to see the individual *.PDF files).



Policy Billing Drop-Down Resources

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

	BILLING 🕶 👉
Account Info:	
Account Info

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

The Account Info screen has three sections:

Policy Search > Policy List >	> 0054321 - Morrow, MD, Ozzy D. > Account 123456A.			
Morrow, MD, Ozz	y D.			
	POLICY -		BILLING 🔻	DOCUMENTS -
Account Info Account Number Bill To	Account Information 123456A - Ozzy D. Morrow, MD - Active Ozzy D. Morrow, MD 326 Mainsail Drive Rohnert Park, CA 94928	Policy Name	Policies billed on this A/C 0054321 Morrow, MD, Ozzy D. 326 Mainsail Drive Rohnert Park, CA 94928	PAY NOW >
Finance Company	None	Policy Status	Inforce	
ERC Account	No	Account Type	Standard Service	
Payment Method	Check	Company	The Doctors Company	
NSF Count	0			

With the first section you can:

- Click Pay Now to process a payment on behalf on your client (using the clients 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.

The next section shows the payment plan installments.

Policy Term:	33: 10/01/2020 - 10/0	1/2021 🔹	Payment Plan: Quarterly 4 Installments	Mid Term B	illing Rule: Spread	Tei	rm Status: Inforce	
	Billed Status	Payment Status	Туре	Bill Date	Due Date	Cancel Process Date	Installment Amount	Balance
1	Billed	Paid	Installment	07/29/2020	10/01/2020	10/01/2020	\$6,324.64	\$0.00
2	Billed	Paid	Installment	11/16/2020	12/13/2020	01/04/2021	\$6,187.12	\$0.00
3	Billed	Paid	Installment	02/16/2021	03/15/2021	04/05/2021	\$6,255.86	\$0.00
4	Billed	Unpaid	Installment	05/17/2021	06/13/2021	07/05/2021	\$6,324.62	\$6,324.62
						Total:	\$25,092.24	\$6,324.62

With the above example, installment four has been billed (by TDC) but is unpaid. The Due Date is 6/13/2021 but the Cancel Process Date (if payment is not made) is 7/5/2021.

The last section shows insured-level information.

Policy:	0054321	Current Term:	10/01/2020 -10/01/2021					
Cert #	Insured #	Name		Insured Status	Billing Start Date	Billing End Date	Current Term Written	Outstanding Balance
0001	1	worrow, MD, 0229 D.		morce	10/01/2020		\$20,002.24	00,021.02

A/R History by Account

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

Policy Search > Pol	licy List > 0054321	Morrow, MD, Ozzy D. > Act	ount 123456A								
Morrow, MD,	Ozzy D.										
		POLICY -			803	LING -			DOCUME	NTS -	
A/R History By	Account										
	A	ccount Information			A/R Su	immary					
Account Number	1	23456A - Ozzy D. Morri	ow, MD - Active	Suspense Amt			\$0.00				
Bill To	c	zzy D. Morrow, MD		Outstanding Balance Current An	ot		\$6,324.62				
	3	26 Mainsail Drive		Outstanding Balance Prior Term			\$0.00				
	R	ohnert Park, CA 94928		Cash Applied To Current Term			\$18,767.62				
ERC Account	N	0		Current Billed Amt Due			\$6,324.62				
Policy Status	lin in	force		Pending Refund			\$0.00				
Filter By	Activity D	ite 💌	Start Date	5/18/2020		End Date	5/18/2021			Go F	
Activity Date	Effective Date	Description	Premiun	Dividend.	PCF	Tax And Surcharge	Credits And Fees	Total	Cash	Total Outstanding	Billed Amount
5/17/2021	5/17/2021	Premium Install- ment 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 DI 3885	\$0.00	\$0.00	S0.00) \$0.00	\$0.00	\$0.00	\$6,255.86	\$6,324.62	\$0.00

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

Policies that begin with "26" have transitioned to our new technology platform and present a more simplified *A/R History by Account* screen (shown below) that requires less time and effort to retrieve a desired policy detail or transaction.

A/R History By A	ccount					
	Account	information	τ	A/R Summary		
Account Number	65432	1A - Mary B. Jones - Active 🔹	Outstanding Balance	\$7,696.40		
Bill To	Mary B.	Jones	Current Amount Due	\$0.00		
	321 Wa	ter Way	Past-Due Amount	\$7,696.40		
	Lake City	FL 32025	Pending Disbursement	\$0.00		
ERC Account	No		In Suspense Amt	\$0.00		
Payment Method	Check					
Last Four Digits						
Policy Status	InForce					
Effective Date	Category	AR History DC Description				Amount
11/05/2021	Payment Received	Credit Card payment for \$9298.93 rec	eived. Receipt date: 11/05/2021			\$9,298.93
11/02/2021	Invoice	Invoice created. Total amount due \$16	5995.33. Due date 11/22/2021			\$16,995.33
10/15/2021	Payment Reminder Notice	Payment Reminder Notice sent to atim	umala@thedoctors.com			
10/01/2021	Invoice	Invoice created. Total amount due \$16	5995.33. Due date 10/22/2021		т	\$16,995.33
09/17/2021	Payment Reminder Notice	Payment Reminder Notice sent to atim	umala@thedoctors.com			
09/02/2021	Invoice	Invoice created. Total amount due \$16	5995.33. Due date 09/22/2021			\$16,995.33
08/17/2021	Payment Reminder Notice	Payment Reminder Notice sent to atim	umala@thedoctors.com			
08/02/2021	Invoice	Invoice created. Total amount due \$16	5995.33. Due date 08/22/2021			\$16,995.33
03/15/2021	Policy Transaction	Flat Cancellation (Policy 2601045 2/2	2/2021 - 2/22/2022): receivable ha	is been processed.		\$15,392.79
02/22/2021	02/22/2021 Policy Transaction Endorsement (Policy 2601045 4/1/2021 - 2/22/:		21 - 2/22/2022): receivable has be	en processed.		S-13,790.25
02/22/2021	Invoice	Invoice created. Total amount due \$38	348.20. Due date 03/14/2021			\$3,848.20
02/22/2021	Policy Transaction	New Business (Policy 2601045 2/22/2	2021 - 2/22/2022): receivable has t	been processed.		\$15,392.79
02/22/2021	Policy Term Issued	Policy Term 2601045 02/22/2021 - 02	1/22/2022 created			
02/22/2021	Account Created	Account created.				

If you have any questions, please contact Agency Support at 800.421.2368, extension 1391, or send an email to <u>agencysupport@thedoctors.com</u>.

Note: For some policies you may see the following.

	A				
POLICY 💌	BILLING 🔻	DOCUMENTS -			
A/R History By Account					
To receive a copy of the documents you need, please contact Member Services at (800) 4	421-2368, press option 1 then 2, or complete this form.				
If requesting via phone, you will need the member's date of birth and the last four digits of the member's Social Security number.					
© 2021 The Doctors Company. All rights reserved. Legal Notices and Privacy Policy Do Not Sell My Personal Information					

Policy Documents Drop-Down Resources

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

	DOCUMENTS
View Documents	
Certificate Of Insurance	
Credentialing Reporting	
Tribute Statement	

View Documents

Click **Documents > View Documents**. You see the *View Documents* screen:

View Doc	cuments				
Show these document types:					
From: 5/	/18/2020	To: 5/18/2021			
G0 ▶					
		Name	Policy	Delivery Date	
		Premium Statement 🦛	0054321	05/17/2021	
		Premium Statement	0054321	02/16/2021	

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.

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

•	Premium Statement		
		Premium Statement	
		DOCPAC Flier	
		AutoPAY Flier	
<i>.</i>		Tribute Flier	

You can then click on the "Premium Statement" document to save and open as a PDF or, by clicking the appropriate checkbox, you can download the:

- Premium Statement "Packet" (see blue arrow)
- Premium Statement document (see red arrow)

 Premium Statement		
-	Premium Statement	
	DOCPAC Flier	
	AutoPAY Flier	
	Tribute Flier	

... and then scroll down and click **DOWNLOAD SELECTED** ...

DOWNLOAD SELECTED >

... to save as a *.ZIP file (which you can later open to see the individual *.PDF files).

On Demand Document Request form

Due to system upgrades, the document download feature is currently unavailable for policies that begin with "26". We apologize for the inconvenience. To receive a copy of the documents you need, please contact Member Services at (800) 421-2368, and press "1", or send a request to Member Services by completing the <u>On Demand Document Request</u> form.

On Demand Document Request
Please describe the requested documents
Tell us your role?
Agent
O Member
Agency name
Agent name
Member name
Policy number
Agent email address
Documents requested
Claims history
Certificate of insurance
Tribute statement
Other
SUBMIT

Certificate of Insurance

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

Morrow, MD, Ozzy	D.	
On-Demand Document	S	
Certificate of Insurance	O Credentialing Report	⊖ Tribute Statement
Insured name:		GO 🕨
Click the member's name to vi	ew the corresponding docume	nt. Click the check box to download documents.
Morrow, MD, Oz	zy D. (1)	
DOWNLOAD SELECTED		

You can click the member's name to view the COI as a *.PDF (see **Red** Arrow) or click the checkbox (see **blue** arrow) and then click **Download Selected** to download and save the file as a *.PDF.

Once saved and opened, the COI appears as follows:

CERTIFICATE	OF INSURANCE	Issue Date: 05/18/2021		
Effective Date: 01/04/	2021	A Claims-Made Profess	ional Liab	ility Policy
First Named Insured: Ozzy D. Morrow, 326 Mainsail Driv Rohnert Park, CA	MD e 94928	IMPORTANT NOTICE: 1 a matter of information at to any recipient. This doo not part of the Policy des not change or extend the Policy.	This docum nd does no ument is n cribed belo coverage	ent is issued as t confer rights ot binding, is w, and does provided by that
Insured: Ozzy D. N	lorrow, MD			
Specialty: PAT01 - P	athology			
Policy Number:		Policy Period:		
0054321		From: 01/04/2021	To:	01/04/2022
Retroactive Date:		Departure Period:		
01/04/1988		From: N/A	To:	N/A
A Named Insured A Locum Tenens An Additional Insur	ed	Shakedown Street In 23 Sugar Magnolia A Mill Valley CA 94941 (415) 234-5678	surance A venue	Agency
	LIMITS	OF LIABILITY		
Claim Limit:		\$1,000,000		
Aggregate Limit.		\$3,000,000		
Locum Tenens and Individuals who oco Policy Period.	Additional Insureds share Li cupy a "slot" share Limits of L	mits of Liability with the applica iability with all others who occi	able Named upy the sar	d Insured. ne "slot" during th
 Photocopies of this 	document are deemed as vi	alid as the original.		
 The Policy, includin by the terms of the 	g Endorsements, determines Policy, or may be subject to	s the coverage provided. Some restrictions such as lower Limi	Claims mathematical Claims mathematical Claims mathematical claims and the claims mathematical claims mathemat Representations mathematical claims	ay not be covere ty.
 If the Policy, or cov changed, we will no applicable state law 	erage for any person, is can otify the First Named Insured v). Coverage is not in effect u	celed for any reason or if the te (and any additional Named Ins nless and until all payments an	erms of the sureds as r re received	Policy are equired by when due.
 If a Departure Perior Professional Servic the Policy will response 	ed is indicated, the Policy will ses Incidents or Review Incid and if we receive a Claim Re	not respond to Probable Clain ents that take place during the port during this period.	n Events ar designated	rising from I period; however

Credentialing Report

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

Morrow, MD, Ozzy D.	
On-Demand Documents	
Certificate of Insurance Credentialing Report	O Tribute Statement
Insured name:	GO 🕨
Click the member's name to view the corresponding docume	nt. Click the check box to download documents.
Member Name	
Morrow, MD, Ozzy D. (1)	
DOWNLOAD SELECTED >	

You can click the member's name to view the COI as a *.PDF (see **Red** Arrow) or click the checkbox (see **blue** 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. However, 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 <u>memberservices@thedoctors.com</u>. The loss run/claims history report will be submitted directly back to the member for their review.

Once saved, you see the following:



Tribute Statement

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



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

You see the following:



Tribute[®] Plan Individual Statement

May 18, 2021

Ozzy D. Morrow, MD 326 Mainsail Drive Rohnert Park, CA 94928 NOTE: Your Tribute award balance may also be distributed in the event that you die or become permanently disabled while insured by The Doctors Company. Eligibility requirements for members who were previously insured by a company acquired by The Doctors Company vary. For additional details, please see thedoctors.com/tribute.

The information in this document is a summary of certain terms and conditions of the Plan Document ("Plan Document") of the Tribute Plan, as established and administered by The Doctors Company. This document does not purport to describe all the terms and conditions of the Tribute Plan. The Plan Document contains a full description of the Tribute Plan. In the event of any conflict, inconsistency, or other difference between this document and the Plan Document, the terms and conditions of the Plan Document will control in every respect. Any projected balance amounts or other projections shown herein are for illustrative purposes only. Said projections are not intended to be a forecast of future events or a guarantee of future balance amounts. The statistics used herein have been obtained from sources the plan administrators believe to be reliable, but the accuracy and completeness of the information cannot be guaranteed. Past experience and practices with respect to Plan Balances do not guarantee the same or similar future results.

For information only. This is not a bill.

Policy Information	
Policy Number	0054321
Tribute Plan Information	
Estimated balance at the end of the current policy term 01/04/2022	\$13,843
Estimated balance in five years	\$16,846

The estimated balance at the end of the current policy term reflects any premium adjustments that have been made since the last statement and represents the accumulated balance if your policy remains in force at the current premium through the policy expiration date cited above. The estimated balance in five years assumes continual renewal at your current premium. These amounts may chance based on premium adjustments.

You are eligible to receive your award when you reach age 55 or older, permanently retire from the practice of medicine, and have five or more years of continuous coverage with The Doctors Company on the day you retire. As a long-term member of The Doctors Company, you already have met the five-year coverage requirement.

To review your estimated balance at any time, or to find more information on the Tribute Plan, visit thedoctors.com/tribute or call us at (800) 421-2368. You can also contact your agent, The Premium Group, Inc. dba The Doctors Company Servicing Agency, at (800)997-3509.

If you are approaching retirement, The Doctors Company Member Services is available to review Tribute Plan award details and required documentation.

Rewarding doctors is just one of the ways we are taking the mal out of malpractice insurance.

SSAIND J12511A (08/17)

See important information on page 2. Page 1 of 2 For more information on the Tribute Plan, click **Tools and Publications**.



You see the Agent's and Broker Web page.

Agent's and Brokers		Tools and Publications for
The same qualities that make us the premium c and superior service—also make us attractive to physicians across many specialties, from individ brokers, and administrators to build products are	noice among physicians—experience, flexibility, strength, activism, a agents and brokers. We understand the nuances of covering ual doctors to large groups, and we have worked with agents, bund the specialized needs of our physicians and hospitals.	Agents News The Agent's Advocate Newsletter
<page-header><section-header><section-header><section-header><section-header><section-header><section-header> ADDELICENCE CONCURSE 1000000000000000000000000000000000000</section-header></section-header></section-header></section-header></section-header></section-header></page-header>	 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 CTDCSU, a wholly-owned subsidiary of The Doctors Company. Visit TDCSU's website for a complete list of risk classes, underwriting contacts, and submission information. 	2018 Agents Meeting 2018 Financial Results Marketing and Sales Support Applications and Forms Agent Marketing Program Co-ob Marketing Program for Chairman's Circle and Key Agencies Dividend Information Information for New York Agents Marketing Publications Print Order Form Marketing Publications for Download Promotional Merchandise d ^a Underwriting and Business Development Contacts
Use our Underwriting and Business Description information. Please send submissions requiring admitted pay you are unsure of where to send a submission, 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 E creating a new user ID and password and provid verification/activation process typically takes up	evelopment Contacts map for contact and ber to the Underwriting region with the majority of the exposure. If send it to any underwriter or region and we'll route it to the ord. boctors Company and have not yet registered, please <u>sign up by</u> ling us with some identifying information. The to two business days.	Social Media Resource Center 2018 Key Agency Program Guide to Online Services for Members Coverage Information New Quote Document MPL Policy Dental Policy Dental Policy CyberGuard CyberGuard for Healthcare Facilities CyberGuard PLUS Select Premium Credit Programs The Tribule Plan

Click The Tribute Plan.

Edition Date: 11/22/2021 - LM 52

Policy Tab Resources

After selecting a policy, you also see the following tabs when you scroll to the bottom of the Policy Summary screen,

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

Insured List

The **Insured List** tab provides the following information:

Insured List	Bill A/Cs	Associations	Plan Asso	ciations	Endorsement	SIR/Deductible	Information	Contact/Delivery						
Primary ins	ured Name	4	Cert Num	insured Nun	n Insured Status	Туре	NS	Cancel Eff Date	Retro Date	Rating State	ERC Status	Transfer	Total Amount	ERC Total Am
e	Morrow,	MD, Ozzy D	0001	1	Inforce	Practitioner			01/04/1988	CA			\$6,906.90	

If you click on the insured name, you see the *Insured Detail* screen.

Policy Search > Policy List	> 00543201 - Morro	ow, Ozzy D > Ir	nsured: Morrow, (Dzzy D					
					BILLING V				DOCUMENTS V
Insured Detail									
Insured	Morrow, N	1D, Ozzy D		Exchange Effective	07/10/1998		Commission		7.50%
Edition	10: 07/10/20	021 - <mark>07/10/20</mark> 22)	Prep Date			ERC Status		
Status	Inforce			Prep Maturation Typ	e		ERC Expiration	1	
Cancel Eff Date				Maturation Year	24		Former Ins. Ca	ancel	
Rating State	MI			Prep Year			Transfer From		AP-10000654-CM
Rating Territory	G			Reunderwriting Date			Transfer To		
Allow Multiple Specialty	No			Retro Date	07/10/1998		Dec Page Spe	ciality	Psychology
Computer Rated	No			Date of Birth	05/29/1961		County		Washtenaw
Pre-Paid ERP	No								
Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians			
Specialty				Exposure Rating Basis	Coverage	Inc	cident Limit	Aggregate Limit	Disc/Srch Debit/Credit
Psychology				1 FTE	Professional Liability		100,000	400,000	
Psychology				1 FTE	MediGuard		25,000	25,000	

Bill A/Cs

The **Bill A/Cs** tab provides the following information:

Insuled List	A/Cs As	ssociations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery			
Accou	unt ERC	Description	Name		Address 1		Address 2	City	State
A/R 123456/	SA No		Morrow,	MD, Ozzie D.	326 Mainsail Drive			Rohnert Park	CA PAY N

ERC Insureds

For policies with ERC insureds, the **ERC Insureds** tab appears and provides the following information:

Ins	sured List	Bill A/Cs	ERC Insureds	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery		
	Name		Cert Number	Editio	on Num	Exchange Eff Date	Cancel Eff Date	Status	ERC Eff Date	ERC Exp Date
	Morrow, MI	D, Ozzy D	0003	9		01/01/1988	07/01/1997	Cancelled	07/01/1997	
	Guappo, M	D, Cat	0006	11		01/01/1988	01/01/1999	Cancelled	01/01/1999	

Association

The **Associations** tab provides the following information:

Insured List	Bill A/Cs	ERC Insureds	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery			
Association	і Туре Па	ime		Vicarious Party Type	A	ddress		Effective Date	Expiration Date	Retroactive Date
Vicarious	Party Cat	, MD, Guappo		Other				11/01/2009		11/01/2009

Plan Association

The **Plan Associations** tab provides the following information:

Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery
There is n	o Plan Associati	ons information.				

Endorsement

The **Endorsement** tab provides the following information:

Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery	
Endorcomo	at Num	1	Endersome	- Description		Endernament	Delieu Level
MPL001 ()4/15)		Policy	an Description		001	1
MPL002 (04/15)		Declaratio	ons Page		002	1
MPL002S	(04/15)		Declaratio	ns Page Schedule o	f Insureds	002S	1
MPL101N	C (04/15)		California	Changes (With Punit	tive Damage Coverage)	101CA	1
MPL270 (10/15)		CyberGua	rd/MediGuard		270	1
MPLBAA (04/15)		Business	Associate Agreemer	nt (HIPAA)	BAA	1
MPLMAIL	PAGE (04/15)		Mail Page			MAILPAGE	1
MPLRBLT	R (12/17)		Renewal I	.etter		RBLTR	1

SIR/Deductible

The **SIR/Deductible Information** tab provides the following information:

Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery
í.						
There is no	o SIR/Deductible	e information.				

Contact/Delivery

The **Contact/Delivery** tab provides the following information:

Insured List	Bill A/Cs	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery		
Address T	pe		Name		A	ddress	Do	cument Delivery
Primary F	ractice		Morrow, M Email: goo	D, Ozzy D oddog@morrow.com	3. R	26 Mainsail Drive ohnert Park, CA 94928	Pe	olicy and Tribute Documents delivered here
Bill To			Ozzy D Mo Phone: (70 Email: goo	rrow, MD 7) 123-4567 ddog@morrow.com	3 R	26 Mainsail Drive Johnert Park, CA 94928	Bi	lling Documents delivered here
Home Ad	dress		Morrow, M Phone: (70 Cell: N/A	D, Ozzy D 17) 123-4567	1 R	23 Pleasant Valley Drive Johnert Park, CA 94928		

Insured Detail

After selecting a policy, you see the following tabs when you scroll to the bottom of the Policy Summary screen,

Г							14	
	Insured List	Bill <mark>A</mark> /Cs	ERC Insureds	Associations	Plan Associations	Endorsement	SIR/Deductible Information	Contact/Delivery
L								

If you select the Insured List tab and then click on a physician's name, you see

Insured List E	Bill A/Cs Associations	Plan Assoc	iations Er	ndorsement	SIR/Deductible In	nformation	Contact/Delivery						
Primary insured	tame 🖌	Cert Num	insured Num	Insured Status	Туре	NS	Cancel Eff Date	Retto Date	Rating State	ERC Status	Transfer	Total Amount	ERC Total Am.
	Morrow, MD, Ozzy D	0001	1	Inforce	Practitioner			01/04/1988	CA			\$6,906.90	

If you click on the insured name, you see the Insured Detail screen.

Policy Search > Policy List	> 0940259 - Kspt, DM	D, Oadal > Insured	:Kspt, DMD, Oadal					
	POLICY	1			BILLING 🔻			DOCUMENTS 🔻
Insured Detail								
Insured	Morrow, N	ID, Ozzy D		Exchange Effective	01/02/2013		Commission	15.00%
Edition	8: 01/02/20	21 - 01/02/2022		Prep Date			ERC Status	
Status	Inforce			Prep Maturation Typ	e		ERC Expiration	
Cancel Eff Date				Maturation Year	9		Former Ins. Cancel	
Rating State	CA			Prep Year			Transfer From	
Rating Territory	E			Reunderwriting Date			Transfer To	
Allow Multiple Specialty	No			Retro Date	01/02/2013		Dec Page Speciality	Periodontist-Doing Sinus Lifts/Conscious
Computer Rated	Yes			Date of Birth	07/23/1983		County	Broward
Pre-Paid ERP	No							
	10				Г.		1	
Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians		

The Insured Detail screen has the following tabs:

Specialty Coverages Endorsements Retent	Association Plan Association	Prior Acts Coverage Limit	Scheduled Physicians
---	------------------------------	---------------------------	----------------------

Click the **Specialty Coverages** tab to see the following:

and a second sec		
Speciality Exposure Rating Basis Coverage Incident Limit	Aggregate Limit	Disc/Srch Debit/Credit
Periodontics Conscious Sedation 0.5 FTE Professional Liability 1,000,000	3,000,000	2% Automated Clearing House Discount
Periodontics Conscious Sedation 0.5 FTE MediGuard 25,000	75,000	
Periodontics Conscious Sedation 0.5 FTE CyberGuard 50,000	50,000	
Periodontics Conscious Sedation0.5FTENotification Services5,000	5,000	

Click the **Endorsements** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians	
Endorsement Num			Endorsement [Description	Endors	Policy Level	
DEN003 (04/16)	Certificate of Insurance				003		0

Click the **Retention** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians
	ilder.				d.k	
There is no Retent	ion information.					

Click the **Association** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians		
Association Type	Name		Vicarious Party	Type Associa	ated Risk Address	Effe	ctive Date Expiration Dat	e Retroactive Date
Additional Insured	Sam A Mo	rrow, MD				03,	/22/2016	01/02/2013

Click the **Plan Association** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians
					LI	
There is no Risk Pl	an Association inform	ation.				

Click the **Prior Acts Coverage Limit** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians
There is no Prior A	cts Coverage Limit inf	ormation.				

Click the **Scheduled Physicians** tab to see the following:

Specialty Coverages	Endorsements	Retention	Association	Plan Association	Prior Acts Coverage Limit	Scheduled Physicians
There is no Schedu	uled Physician informa	tion.				

Payments Due

To access the Payments Due reports, click **Policies > Payments Due**.

The Doctors Company TDCgroup		*		
	Policy Search	Policies 🗸	All Documents	Tools and Publications
POLICY SEARCH	Policy L Paymen	ist ts Due 🛹		

You see the default 20-Day Payments Due list:

Policy Search	n > Payments Du	e						
Paym	ents Du	ie						
Advance Not	ice of Payments	Due						
Your search	found 253 result	S.						
20 Days	•		Broker of Record Agency (Select) ▼ GO ► DOWNLOAD 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	Payment
0064606	A/R	122860A	04/01/2003 04/01/2022 Glahhphmh Kahhlrfhdhp Prhphfhhmhm IP	03/25/2021	WA	Standard	Check	PAY NOW
2388108	A/R	1376920A	04/01/2021 04/01/2022 Misoyj Idyjbcbeo, II Qgd Misoyj Qcdeiboycso	04/10/2021	WA	Standard	Check	PAY NOW
0/17/06	A.(D	10770504	06/20/2020 06/20/2022 Account owner Maye Alay	07/24/2021	CA	Standard	Charle	DAY NOW

From the report **days drop-down** list, you have 5-Days, 10-Days and 20-Days report option.



With this example I select the **Five-Days** report option and click **GO** to see ...

... the Five-Day list showing policies that could be cancelled for non-payment if payment is not made in five business days.

Note: You see the Pay Now prompt, which you can click to process E-Check or Credit Card payment on your client's behalf.

Paym	nents D	ue								
Advance No	tice of Payment	ts Due								
5 Days	*	ata.	Brok	er of Record Age	ncy (Select) • G0 • DOWNLOAD LIST •	í				
Policy #	A/R By Account	tt Billing Account ERP	Effective Date	Expiration Date	Primary Insured/Policy Owner	Payment Due Date	State	Account Type	Payment Method	Payment
0064606	A/R	122860A	04/01/2003	04/01/2022	Glahhphmh Kahhlrfhdhp Prhphfhhmhm IP	3/20/2021	WA	Standard	Check	PAY NOW
2388108	AJR	1376920A	04/01/2021	04/01/2022	Misoyj Idyjbcbeo, Il Ogd Misoyj Ocdelboycso	3/17/2021	WA	Standard	Check	PAY NOW
2417486	A/R	1377259A	06/29/2020	06/29/2022	Guappo, MD, Cat	3/19/2021	CA	Standard	Check	PAY NOW

Note: This report, based on the option selected, shows all policies with payment due, including Offers of Insurance and recently cancelled policies.

Account Info Account Information Policies billed on this A/C PAY NOW ▶ Account Number 1377259A v Policy 2417486 Bill To Name ENROLL IN AUTOPAY > Guappo, MD, Cat Cat Guappo, MD 24 Maria Court 24 Maria Court Emeryville, CA 94608 Emeryville, CA 94608 **Finance Company** None Policy Status Inforce ERC Account No Account Type Standard Service Payment Method Check Company The Doctors Company NSF Count 0 Prior Term Balance \$0.00 Policy Term: 1: 03/29/2021 - 03/29/2022 * Payment Plan: Quarterly 4 Installments Mid Term Billing Rule: Spread Term Status: 0 **Billed Status** Payment Status Туре **Bill Date** Due Date **Cancel Process Date** Installment Amount Balance 1 Billed \$1,035.34 \$1,035.34 Unpaid Installment 01/19/2021 03/19/2021 03/19/2021 2 Unbilled \$1,024.08 \$1,024.08 Unpaid Installment 08/15/2021 09/09/2021 09/29/2021 3 Unbilled Unpaid Installment \$1.012.83 \$1.012.83 11/14/2021 12/09/2021 12/29/2021 4 Unbilled Unpaid Installment 02/12/2022 03/09/2022 03/29/2022 \$1,035.34 \$1,035.34 \$4,107.59 Total \$4,107.59

From the displayed report, click any Billing Account # to see the Account Information screen for that policy:

With this example, the first installment (which I highlighted) was billed on 01/19/2021 with a due date and cancel process date of 03/19/2021. The installment has not been paid as of the current report.

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.

Agent Online Payments and Enroll in AutoPAY

On your client's behalf, you can process policy payments and enroll in AutoPAY.

Note: The online pay features are only available for standard accounts (custom and middle market accounts are excluded).

Make a Payment

From the Policy Search tool, enter the policy name or policy number, and click **GO**. You see the *Policy Summary* screen.

	POLICY *				BILLING -			DOCUMENTS -	
olicy Summary									
olicy #	2	0938444			Primary Practice	326	Mainsail Drive		
dition		8: 03/22/2021 - 03/	22/2022		*	Roh	nert Park, CA 94928		
atus		Inforce			Practice Phone	(707	-123-45576		
porting Type	1	Claims Made and Re	ported		Email	goo	ddog@morrow.com		
ansaction Effective Date	3	03/22/2021			Bill To	0	D Harray HD		
derwriter	3	Keeva Hughes				326	y D Morrow, MD Mainsail Drive		
		IT-APPDEV-UAT-NOTI	FICATIONS@thedoctors	com		Roh	nert Park, CA 94928		
	1	(904) 360-3061							
									MOR
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	+
			Onny D. Marray	UD	200 Mainsail Daires		Debeert Bark	CA	They appeal

Click the **Bill A/Cs** tab and then click **Pay Now**.

You see the Make a Payment screen.

Image of the Fayment Pay total outstanding amount: \$359.52 Pay this amount: Voluntary DOCPAC contribution Include DOCPAC: Do not include DOCPAC Total payment amount ENTER PAYMENT INFO
 Pay this amount: Voluntary DOCPAC contribution Include DOCPAC: Do not include DOCPAC Total payment amount ENTER PAYMENT INFO >
Voluntary DOCPAC contribution Include DOCPAC: Do not include DOCPAC Total payment amount ENTER PAYMENT INFO Output Description D
 Include DOCPAC: Do not include DOCPAC Total payment amount ENTER PAYMENT INFO >
O Do not include DOCPAC Total payment amount ENTER PAYMENT INFO
Total payment amount \$0.00
ENTER PAYMENT INFO
One Tree it Description
Save time with Recurring Payments
You are currently enrolled in <u>AutoPAY</u> . Your next payment will be deducted from your
checking account ending in 6124. Cancel AutoPAY
of DALE AUTOMAT P

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**, and if inclined make the voluntary DOCPAC selection.

With this example, I clicked **Pay total outstanding amount**. And since I will include a DOCPAC contribution, I also clicked **Include DOCPAC** and I entered 50.00.

O Do not include DOCPAC	\$409.52
Include DOCPAC: O Do pot include DOCPAC	50.00
Voluntary DOCPAC contribution	
⊖ Pay this amount:	
Pay total outstanding amount:	\$359.52

Click Enter Payment Info.

You see the Enter Payment Information screen.

NOTE: Payments can be made by E-Check or Credit Card. With this example I make a Credit Card payment.

Enter Payment Information	
Account name:	
Morrow, MD, Ozzy D	
Please enter your client's e-check or credit card information to make a payment on	his or her behalf.
Pay by:	
○ E-check	
Payment account type:	
Corporate 🗸	
Card number: 411111111111111	
Card type: Visa	
Expiration date: Jul v / 2025 v	
Verification number (What's this?): 1234	
Name on card:	
Sam Morrow	
□ Save this card	

I click **Save this card** so that I have this information saved for future installment payments.

Billing Information	
First name: Sam	
Last name: Morrow	
Address: 326 Mainsail Drive	
City: Rohnert Park	
Zip code: 94928	
State: California	
Contact Information	
E-mail address: Sam@Morrow.com	
Secondary e-mail address (optional): agent@acme.com	
A notification will be sent to each e-mail address.	1
REVIEW PAYMENT INFO >	
Note: For policies that begin with "26", the Secondary Email Address field will only be available for ACH/EFT payments and not Credit Cards. This will be fixed at a later date.

Once all payment information is entered, click **Review Payment Info**.

You see the Review and Submit Payment Information screen.

Payment Amount [Edit payment amount]	
Amount selected:	\$359.52
Voluntary DOCPAC contribution:	\$50.00
Total payment amount:	\$409.52
Payment Method [Edit payment method]	
Type: VISA	
Account number: XXXXXXXXXXXXXX1111	
Expiration date: 07/2025	
Cardholder name: Sam Morrow	
Credit Card Billing Information:	
Sam Morrow	
326 Mainsail Drive	
Rohnert Park, CA 94928	
US	
Contact Information:	
Phone:	
E-mail address: Sam@Morrow.com	
Secondary e-mail address: agent@acme.com	
SUBMIT PAYMENT INFO	

After completing review, click **Submit Payment Info**.

Once you complete a final review of the payment amount and method click Submit Payment Info. You see the Payment Confirmation screen.

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: Morrow, MD, Ozzy D Account number: 1043823A Primary policy number: 0938444

Payment method: VISA Total payment amount: \$409.52 Authorization number: 831000

An e-mail confirmation of this transaction was sent to it-appdev-uat-notifications@thedoctors.com.

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

PRINT THIS PAGE

To print, click **Print this Page**.

A confirmation e-mail is sent to the e-mail address provided.

Make an E-Check Payment

Note: With this example I show the steps to process an E-Check payment from the Make a One-Time Payment screen.



From the Make a One-Time Payment screen, enter the payment amount in the Pay this amount field and click Enter Payment Info.

You see the Enter Payment Information screen. Enter the E-Check information.

Enter Payment Information	
Account name:	
Ohtggk, DDS, Vgi A.	
Please enter your client's e-check or credit card informa	ation to make a payment on his or her behalf
Pay by:	
E-check O Credit card	
Account type:	
Corporate checking	×
Routing number (What's this?):	
091000019	
Re-enter account number: 1234567	
Name on account:	
Vgi Ohtggk	<u></u>
Billing Information	
First name:	
Vgi	
	<u> </u>
Last name:	<u> </u>
Last name: Ohtggk	
Last name: Ohtggk Address:	
Last name: Ohtggk Address: 1199 S. Pwybwjs Pbsjjb	
Last name: Ohtggk Address: 1199 S. Pwybwjs Pbsjjb	

NAME			1234
CITY, STATE ZIP	DATE		
PAY TO THE ORDER OF			\$
BANK NAME ADDRESS CITY, STATE ZIP			DOLLARS
:123456789:	123456789123	1534	f
Bank	Bank		

State: Florida	
Contact Information	
Phone: (465) 123-4567	_
E-mail address: IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com	
Secondary e-mail address (optional):	
A notification will be sent to each e-mail address.	
✓ I agree to the Terms of Agreement.	
REVIEW PAYMENT INFO >	+

Click the I agree to the Terms of the Agreement checkbox, after reviewing the Agreement terms.

Then click Review Payment Info.

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

Review and Submit Payment Information	
Account name: Ohtggk, DDS, Vgi A. Billing account: 1043823A Primary policy: 0938444	Payment Amount [Edit payment amount] Amount selected: \$1,000.00 Voluntary DOCPAC contribution: \$0.00 Total payment amount: \$1,000.00
Policy term: 3/22/2020 to 3/22/2021 Outstanding amount: Billed amount:	Payment Method [Edit payment method] Type: Corporate Checking Account Account number: XXX4567 Routing number: 091000019 Name on bank account: Vgi Ohtggk \$0.00 Bank Account Billing Information: Vgi Ohtggk 1199 S. Pwybwjs Pbsjjb Miami FL 33134
Policy term: 3/22/2021 to 3/22/2022 Outstanding amount: Billed amount:	 \$3,485.65 \$0.00 US Contact Information: Phone: (465) 123-4567 E-mail address: IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com Secondary e-mail address:
Total outstanding amount: Total billed amount:	\$3,485.65 \$0.00

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

You see the Payment Confirmation screen.

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: Ohtggk, DDS, Vgi A. Account number: 1043823A Primary policy number: 0938444

Payment method: Corporate Checking Account Total payment amount: \$1,000.00 Authorization number: 2MQ9DT42BKLYRXO

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

An e-mail confirmation of this transaction was sent to IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com.

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

PRINT THIS PAGE

A confirmation e-mail is sent to the e-mail address provided.

Enroll in AutoPAY

From the Policy Search tool, enter the policy name or policy number, and click **GO**. You see the *Policy Summary* screen.

Click the **Bill A/Cs** tab and then click **Pay Now**.

POLICY -		E	BILLING 🔻			DOCUMENTS -	
Policy Summary							
Policy #	0938444		Primary Practice		5411 P. Pjrwjwj Qyjwwy #5	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_QANotific	cations@thedoctors.com.TE	ST
Transaction Effective Date	03/22/2021		Bill To		Vgi A. Ohtggk, DDS		
Underwriter	Keeva Hughes				1199 S. Pwybwjs Pbsjjb #	590	
	IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.c	om			Miami, FL 33134		
	(904) 360-3061						
							MORE
Insured List Bill A/Cs ERC Insured	ds Associations Plan Associations	Endorsement SIR.	/Deductible Information	Contact/Delivery			
Account EDC Descriptio	Norma		Idraca 1	Address 0	CT	Croto	
Account ERC Description		AU		Address 2	City	State	+
1043823A NO	Vgi A. Ohtggk, DDS	11	99 S. Pwybwjs Pbsjjb	#590	Miami	FL	PAY NOW

Make a Payment

Account name: Ynnnsjih, DMD, Ognunjn

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

Save Time with Recurring Payments

<u>AutoPAY is easy.</u> 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!

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

Click Enroll in AutoPAY. You see the Enroll in AutoPAY screen.

Enter the appropriate information.

Note: With this example, I set up AutoPAY using E-check.

Enroll in AutoPAY
Account name: Ynnnsjih, DMD, Ognunjn
Please enter your client's e-check or credit card information to make a payment on his or her behalf.
Pay by:
E-check O Credit card
Payment account type:
Corporate 🗸
Account type: Personal checking
Routing number (What's this?): 091000019
Account number (What's this?):
1234567
Re-enter account number:
1234567
Name on account:
Vgi Ohtggk

Billing Information	
Address:	
1 Main Sreet	
City:	
Cotati	
Zip code:	
94928	
State: California	
Contact Information	
E-mail address:	
Imorrow@thedoctors.com	
Secondary e-mail address (optional):	
I	
A notification will be sent to each e-mail address.	
I have chosen to include the suggested DOCPA	AC contribution of \$50.00 per installment. I understand that DOCPAC amounts may vary as policy conditions chang
I agree to the Terms of Agreement.	
REVIEW PAYMENT INFO	

After entering the required AutoPAY information, click I agree to the Terms of the Agreement, after reading the agreement terms, and then click Review Payment Information.

You see the Review and Submit AutoPAY Information screen.

Review and Submit AutoPAY Information

Account name: Ynnnsjih, DMD, Ognunjn

Billing account: 1037687A Primary policy: 0930417 There is no outstanding amount. Payment Method [Edit AutoPAY enrollment info] Type: Checking Account Account number: XXX4567 Routing number: 091000019 Name on bank account: Vgi Ohtggk

Bank Account Billing Information: 1 Main Sreet Cotati, CA 94928 US

Contact Information: E-mail address: Imorrow@thedoctors.com Secondary e-mail address: Include suggested DOCPAC contribution: No

SUBMIT AUTOPAY INFO >

After completing the review, click **Submit AutoPAY Info**.

You see the AutoPAY Enrollment Confirmation screen.

AutoPAY Enrollment Confirmation You have successfully enrolled in AutoPAY for account 1037687A, Ynnnsjih, DMD, Ognunjn. 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 Imorrow@thedoctors.com. If you have questions about your bill, please call Member Services at (800) 421-2368. PRINT THIS PAGE

To print, click **Print this page**.

A confirmation e-mail is sent to the e-mail address provided.

[TEST] AutoPAY Enrollment Confirmation

The Doctors Company Member Services <it-appuat@thedoctors.com> To OMorrow, Larry Retention Policy TDC - Inbox Items - 90 Days (90 days)

THEDOCTORSCOMPANY

AutoPAY Enrollment Confirmation

You have successfully enrolled in AutoPAY for account 1037687A, Ynnnsjih, DMD, Ognunjn.

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.

If you have questions about your bill, 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.

Unsubscribe or update your notification preferences

Please do not reply to this message. It was sent from an unmonitored e-mail address.

THE DOCTORS COMPANY, 185 GREENWOOD ROAD, NAPA, CA 94558 | WWW.THEDOCTORS.COM | PRIVACY POLICY

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**. You see the *Policy Summary* screen.

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

POLICY 🔻		BILLING	•		DOCUMENTS *	•	
Policy Summary							
Policy #	0938444	Pr	rimary Practice		5411 P. Pjrwjwj Qyjwwy #582		
Edition	8: 03/22/2021 - 03/22/2022	*			Miami, FL 33134		
Status	Inforce	Pr	ractice Phone		(936) 469-5666		
Reporting Type	Claims Made and Reported	En	mail		IT-APPDEV-DEV_QANotifications@thedd	octors.com.TES	ſ
Transaction Effective Date	03/22/2021	Bi	II To		Vgi A. Ohtggk, DDS		
Underwriter	Keeva Hughes				1199 S. Pwybwjs Pbsjjb #590		
	IT-APPDEV-UAT-NOTIFICATIONS@thedoctors.com				Miami, FL 33134		
	(904) 360-3061						
							MORE >
Insured List Bill A/Cs ERC Insureds	Associations Plan Associations Endo	lorsement SIR/Deduc	ctible Information	Contact/Delivery			
Assessed Total Description				Address D		Charles .	
Account ERC Description	Name	Address 1		Address 2	City	State	*
1043823A No	Vgi A. Ohtggk, DDS	1199 S. I	Pwybwjs Pbsjjb	#590	Miami	FL	PAY NOW

You see the *Make a Payment* Screen. If the policy already has AutoPAY setup, you see the **Update AutoPAY** button.

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

To make changes to an existing AutoPay, click Update AutoPAY.

To cancel an existing AutoPay, click Cancel AutoPAY.

News and Marketing and Sales Support

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



To see additional resources, click See All Tools and Publications for Agents.

Main Menu

Additional navigation is provided by the Main Menu bar. Click a menu option and select from the menu's drop-down list.



Quotes and Applications

The Doctors Company			*		
	Policy Search	Policy List	Quotes and Applications	All Documents	Tools and Publications

Quotes and Applications is a resource for agencies that are set up to process online dental quotes and applications. For more information, contact Agency Support by sending email to <u>agencysupport@thedoctors.com</u> 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 – where you can access many resources in addition to:

a PDF version of Underwriting and Business Development Contacts...



Agents and Brokers

Here's a quick quide 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.

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

Tools and Publications for

Agents

New York Agent Information News The Agent's Advocate Newsletter 2021 Virtual Annual Agents Meeting 2020 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**

... and where you can access a PDF version of the *TDC Agent Website Portal User Guide*.

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	Social Media Resource Center 2022 Key Agency Program Coverage Information New Purchased Tail Rates MPL Policy CyberGuard
more, see the Agent/Broker Portal User Guide.	The Tribute Plan
If you are an established medical malpractice agent or broker representing physicians, <u>we'd like to hear from you</u> . For doctors who are unable to find coverage in the standard markets, we operate our subsidiary, <u>TDC Specialty</u> <u>Insurance Company</u> , 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?	
 These remarkable Tribute Plan milestones speak for themselves: More than \$120 million total Tribute awards have been paid to date. There have been over 10,000 Tribute awards distributed. 	
The highest distribution to date is \$264,808. The highest current individual balance is \$283,725. Learn more about the Tribute Plan and access important information to share with your clients. Access and order marketing materials that can help you fully leverage the power of Tribute.	
Check your clients' balances—and let them know how significant their award could be when they retire from the practice of medicine.	

Header



My Account | Contact Us | Report a Claim | 🔍

From the Header links you have access to the following

TDC Group Logo



Click the **TDC Group Logo** to return to the Landing Page.

My Account

Click My Account ...



... to see the following menu options:



Change Password

Click **Change Password** to change the Password associated with your Account's User ID.

You see the *Change Password* screen:

Change Password	
Enter existing password	ī
	0
Choose a new password	
	Ø
Re-enter new password	
	ø
SAVE CHANGE >	

Follow the instructions and then click **Save Change** to save the new password.

Note: If you decide not to change the Password, click the **TDC Group Logo** to return to the Landing page.



Change Security Question

Click Change Security Question to change the Security Question associated with your Account's User ID.

You see the Change Security Question screen:

Change Securit	ty Questior
Enter existing password	- 24
Select a security question	
	~
Enter answer to security question	
SAVE CHANGE	•

Follow the instructions and then click **Save Change** to save the new security question.

Note: If you decide not to change the Security Question, click the **TDC Group Logo** to return to the Landing page.



Sign Out

Click **Sign Out** to exit the Agent Portal.

You see the Sign In screen:

Sign In		
For assistance, memb Support at (800) 421-	pers can contact Member Services at (800) 421-23 2368, extension 1391, or <u>agencysupport@thedoc</u>	368 or <u>memberservices@thedoctors.com</u> . Agents can contact Agency tors.com.
User ID	ら Forgot ID?	
		New to The Doctors Company?
Password	Forgot password?	REGISTER ACCOUNT
	P	
	SIGN IN >	

For more information about signing into the Agent Portal, visit the <u>Sign In</u> section of this User Guide.

Contact Us



My Account | Contact Us 🕇 Report a Claim | 🔍

Click **Contact Us** to see the following menu options:

My Account Contact Us 🌱 Report a Claim 🔍
GENERAL INFORMATION
Call (800) 421-2368 Mon-Fri, 8:00 AM - 5:00 PM (PST)
The Doctors Company 185 Greenwood Road Napa, CA 94558
Email Us
Careers
Press Contacts
FOR MEMBERS
Report a Claim
Member Services
Patient Safety
LOOKING FOR COVERAGE?
Get a Quote
Apply for Coverage
Find an Agent

Report a Claim - Report a Claim



My Account | Contact Us | Report a Claim

Click Report a Claim to see the following:





Footer

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Click Legal Notices and Privacy Policy | Do Not Sell My Data to access The Doctors Company's Legal Notices and Privacy Policy.

Agency Support Assistance

Thank you for reviewing our Agent/Broker Website Portal Training Guide.

For more information, or to provide feedback, contact Agency Support by sending e-mail to <u>agencysupport@thedoctors.com</u>, or by calling (800) 421-2368, extension 1391.