

How to Book an Annual Plan:

1. Start by Logging into the Site as an Advisor, once logged in you can either:

a. Select Get a Quote

The screenshot shows the Travel Insured International dashboard. On the left is a navigation menu with options like 'Return to old dashboard', 'Agency Management', 'Agency Resource', 'Claims', 'Feedback', 'Group Plans Information', 'Infographics', 'Manifest/Payment', 'News & Resources', and 'Plan Comparison'. The main content area features three cards: 'Travel Protection Plans', 'Group/Tour Protection Plans', and 'Travel Insured Advisor Portal (TAP)'. At the top, there are four performance metrics: '\$123 through this day last year', '1 plans through this day last year', '0% conversion rate', and '\$18 through this day last year'. A blue arrow points to the 'GET A QUOTE' button in the 'Travel Protection Plans' card.

b. Select Purchase Plan (Enter in State of Residence) and select Get a Quote under the Product

This screenshot is identical to the one above, showing the same dashboard layout. However, a blue arrow now points to the 'PURCHASE A PLAN' button in the 'Travel Protection Plans' card.

2. When Quoting it will ask for Trip Specifics:

- a. We understand your client may not have a specific trip booked- therefore when asking for Dates Of Travel please enter in pseudo dates of travel. **Do not enter in 365 Days**
- b. If this is not for a specific Trip, you can also enter in a pseudo-Trip Deposit Date (for example if you are quoting on 3/2/2022, you can use that date)
- c. Email address should always be the clients. **This plan cannot be emailed as a quote**
 - i. **If this is for you, the advisor, please use your personal email not your business, as you will receive an error message.**

Country of Residence
United States

State of Residence
Connecticut

Departure Date
3/3/2022

m / d / yyyy

Return Date
3/4/2022

m / d / yyyy

Trip Length **2 days**

Initial Trip Deposit Date
3/2/2022

m / d / yyyy

Destination
Optional

- d. Trip Cost- Enter in 0 since you will have to fill out the trip segments in the purchase screen.



Testing Agency
Agency # 48478
Agent ID: Testing Agency

Home

- Agency Management
- Agency Resource
- Claims
- Feedback
- Group Plans Information
- Infographics
- Manifest/Payment
- News & Resources
- Plan Comparison
- Selling Tools
- Training

Trip Length 2 days

Initial Trip Deposit Date
3/2/2022

m / d / yyyy

Destination
Optional

Email Address
test@gmail.com

How Many Travelers?
1

	First Name	Last Name	Date of Birth	Age	Trip Cost
Traveler 1	Jane	Doe	01/01/1985	37	0
			m / d / yyyy		\$?

GET QUOTE

If you have questions, please contact our Customer Care department 24/7 at 1-800-243-3174

Then Select Get Quote

On the Quote Screen:

1. If you select any optional upgrade it will not show the cost since you have to enter that information in on the application. (If you need a quick reference please refer to the PDF).
2. Please keep in mind that the Premium Reflected is for the Base Plan. **That initial quote does NOT include Trip Cancellation.**
3. Select Purchase if you are ready to book.

Purchase Screen:

1. Fill in your Client's information.
 - a. First and Last Name
 - b. Email (Their Email address: If this is for you the advisor please use another email address that is not linked to your Travel Insured Agent Profile)
 - c. Mailing Address
 - d. Telephone Number
2. Effective Date:
 - a. This cannot be changed after purchase. This is when the policy will start. Which means all dates of travel for the segments will have to be added after this date.
 - b. Your Effective Date can be selected up to 90 days out from your purchase date.

Trip Information (dates, destination & carriers)

Effective Date
3/2/2022 

 m / d / yyyy

3. Trip Segments: This is where you are going to add your optional upgrade for specific trips. You do not need to add Trip Segments if you **ONLY** want the Base Plan.
 - a. Destination, Departure, Return, Deposit Date are Mandatory
 - b. Check off the Traveler who the segment is relating to. You will see your information updated if the mandatory fields are filled in.
 - c. **** Trip Cancellation, and CFAR must have a Trip Cost Entered****

Trip Segments (for Annual Policy)

Optional Bed Rest 

Destination
Bermuda

Departure Date	Return Date	Deposit Date	Final Payment Date	
3/3/2022	3/9/2022	3/2/2022		
m / d / yyyy				

Trip Cost: Price: \$14.00

Jane D

Click on each traveler for details.

Jane D	\$ 108.00
Total	\$ 108.00

all fields are required unless otherwise noted

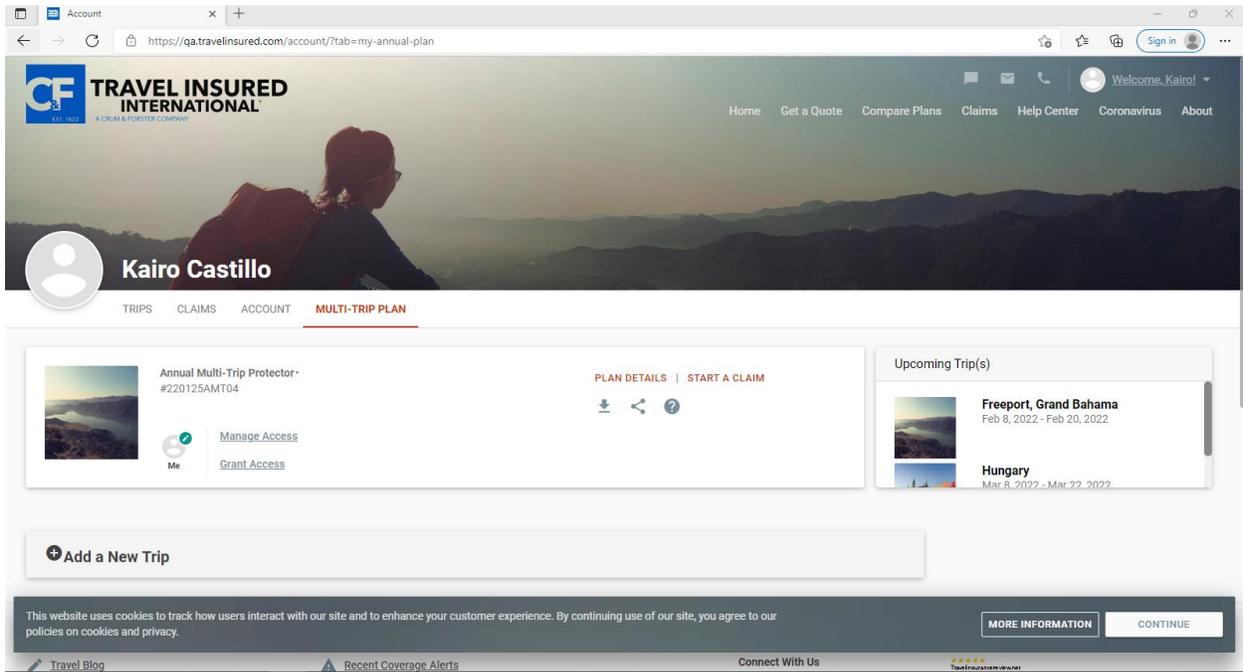
4. Payment: Finalize the Payment Method and the policy will be complete.

Customer Profile:

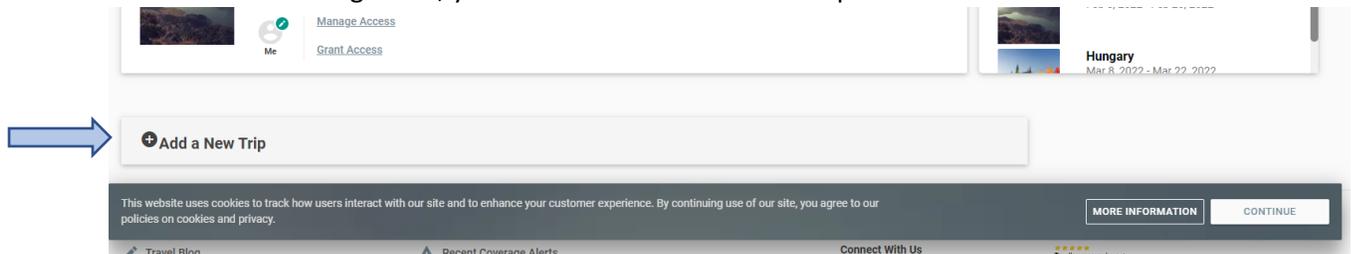
1. After the policy is purchased the client will receive an email asking them to create a Customer Profile. **Please make sure they are entering in their information as it reflects on the policy.**
2. Once their profile is created the client will be able to go in and add Trip Segments whenever they want to add an optional upgrade. They would pay the additional premium at that time.

Customer Profile:

1. The profile will look like



2. To add additional Segments, you would select: Add A New Trip



- If your client does not see Add a New Trip Under their Multi-Trip Plan Tab please reach out to CustomerCare@travelinsured.com

Additional Information:

- You will not be able to add or remove optional benefits after your trip segment is created.
 - If you want to modify your optional benefits after saving a trip, please contact us.
- Keep in mind that Trip Cancellation, Trip Interruption, and Cancel for Any Reason are meant to protect your non-refundable trip cost.

- The pricing for these benefits is based on the trip cost.
- If you do not enter a trip cost, you will not be able to purchase these benefits
- The traveler will need to enter a destination for each trip segment
- **Pre-Existing Medical Conditions:**
 - Payment for the plan is received within 21 days of the date that your initial trip deposit is received (day after deposit is day 1).
 - Must not be disabled from travel on day of plan purchase.
 - Insure 100% of all prepaid, nonrefundable trip costs and update the coverage to include the additional cost of the subsequent arrangements within 21 days of payment to the travel supplier..
 - Only available for trips where the non-refundable trip cost is insured
- **Cancel For Any Reason:**
 - You purchase the Cancel for Any Reason Benefit within the Time Sensitive Period; and
 - You insure the full cost of any subsequent arrangements added to Your Trip within 21 days of the date of Your payment for any such subsequent Travel Arrangements; and
 - You cancel Your Trip no later than 48 hours prior to the Scheduled Departure Date of Your Trip
 - *Benefit pays up to 75% of the nonrefundable trip cost.
- CURRENTLY NOT AVAILABLE IN MT, MO, PA, WA or NY