

# K-12 Enrollment Website

## User's Guide

6/13/2014

*Health Special Risk, Inc*

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I. General Information – The design and flow of this site has changed. It has been simplified for ease of use.

II. What's New?

a. Flow Change

- i. Previous flow was: Find District, Add Student, Add Coverage, Find Campus, Add Account, Pay
- ii. New flow is: Add Account, Add Student (includes Find District/Campus), Add Coverage, Pay

- b. User ID/Password requirements strengthened
- c. 18-year-old age restriction lifted
- d. 12-student per account limitation restriction lifted
- e. Online receipt display vs previous email notification

III. Navigation Basics

a. Menu

This menu is displayed before a user logs in to the application. Cells with a light blue background indicate the page that you are current viewing. Click on any other cell to navigate to that page.

K12 Enrollment Home	MyAccount Logon	Open New Account	Browse Rates
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Here is the menu displayed after a user logs in to the application:

K12 Enrollment Home	MyAccount Home	Add Student	LOGOFF
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If you see the “Shopping Cart” menu item displayed, it means that you selected coverage for purchase. Click on it to display those items. This is also where you go to Checkout and pay for your coverage.

K12 Enrollment Home	MyAccount Home	Add Student	Shopping Cart	LOGOFF
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b. Links

Links (or hyperlinks) are displayed as underlined text. Your mouse pointer will change from an arrow to a hand when you “hover” over the link. Click on a link to redirect you to a new page. Here are some examples:

- i. These are the “footer” links found at the bottom of every page:

[About Us](#) | [Claim Information](#) | [Website User Guide](#) | [Contact Us](#)

- ii. These are links to Student Information. Click on the link to open up the respective student’s data page:

Student	SSN	Date of Birth	School District	Campus	Grade
Mary Tester	123-45-6789	01/01/2005	ABBOTT ISD	ABBOTT ISD	1
Billy Tester	234-56-7890	01/01/2004	ABBOTT ISD	ABBOTT ISD	2

c. Buttons

Buttons are used to execute some action, such as Submit a form, Cancel an action, Reset form fields back to their original values. Here are some examples:

Add Selected Items to Shopping Cart	Start Over	Show Subtotal
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IV. Sections  
a. Browse rates

Step one: Pick State

<a href="#">K12 Enrollment Home</a>	<a href="#">Back to MyAccount</a>	<a href="#">Browse Rates</a>
Pick your State: <select style="width: 100px;"></select>		

Step two: Pick District

<a href="#">K12 Enrollment Home</a>	<a href="#">Back to MyAccount</a>	<a href="#">Browse Rates</a>
Pick your State: <select style="width: 100px;">Texas</select>	Pick your School District: <select style="width: 100px;"></select>	

Step three: View Rates

<a href="#">K12 Enrollment Home</a>	<a href="#">Back to MyAccount</a>	<a href="#">Browse Rates</a>																																																			
Pick your State: <select style="width: 100px;">Texas</select>	Pick your School District: <select style="width: 100px;">ABBOTT ISD</select>																																																				
<table border="1"><thead><tr><th>Activity</th><th>Demographics</th><th>Marketing Plan</th><th>Rate</th></tr></thead><tbody><tr><td>24 Hour</td><td>PK-12</td><td>Economy</td><td>\$126.00</td></tr><tr><td>24 Hour</td><td>PK-12</td><td>Premier</td><td>\$193.20</td></tr><tr><td>At School</td><td>PK-12</td><td>Economy</td><td>\$63.00</td></tr><tr><td>At School</td><td>PK-12</td><td>Premier</td><td>\$92.40</td></tr><tr><td>Extended Dental</td><td>PK-12</td><td>Extended Dental</td><td>\$8.40</td></tr><tr><td>Football</td><td>High School</td><td>Economy</td><td>\$185.85</td></tr><tr><td>Football</td><td>High School</td><td>Premier</td><td>\$285.60</td></tr><tr><td>Injury and Sickness</td><td>PK-12</td><td>Injury and Sickness</td><td>\$617.40</td></tr><tr><td>Injury and Sickness</td><td>PK-12</td><td>Injury and Sickness</td><td>\$154.35</td></tr><tr><td>Injury and Sickness</td><td>PK-12</td><td>Injury and Sickness</td><td>\$102.90</td></tr><tr><td>Spring Football</td><td>High School</td><td>Economy</td><td>\$74.55</td></tr><tr><td>Spring Football</td><td>High School</td><td>Premier</td><td>\$114.45</td></tr></tbody></table>		Activity	Demographics	Marketing Plan	Rate	24 Hour	PK-12	Economy	\$126.00	24 Hour	PK-12	Premier	\$193.20	At School	PK-12	Economy	\$63.00	At School	PK-12	Premier	\$92.40	Extended Dental	PK-12	Extended Dental	\$8.40	Football	High School	Economy	\$185.85	Football	High School	Premier	\$285.60	Injury and Sickness	PK-12	Injury and Sickness	\$617.40	Injury and Sickness	PK-12	Injury and Sickness	\$154.35	Injury and Sickness	PK-12	Injury and Sickness	\$102.90	Spring Football	High School	Economy	\$74.55	Spring Football	High School	Premier	\$114.45
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<p>Notes:</p> <ul style="list-style-type: none"><li>• Regular Football coverage is only available for purchase before 1 Jan</li><li>• Spring/Summer programs are available for purchase after 1 Jan</li></ul>																																																					
<p>Brochures</p> <table border="1"><tr><td><a href="#">MC34919-TX</a></td><td>Accident - TX</td></tr><tr><td><a href="#">MC34919_SP-TX</a></td><td>Accidente - TX (Español)</td></tr><tr><td><a href="#">TX11WHSREXX</a></td><td>Injury &amp; Sickness - TX</td></tr><tr><td><a href="#">2011OLEF</a></td><td>Online Enrollment Flyer</td></tr></table>		<a href="#">MC34919-TX</a>	Accident - TX	<a href="#">MC34919_SP-TX</a>	Accidente - TX (Español)	<a href="#">TX11WHSREXX</a>	Injury & Sickness - TX	<a href="#">2011OLEF</a>	Online Enrollment Flyer																																												
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If there are no entries in the District dropdown list after you select the state, it means that we do not offer any coverage in that state. If you get the message below, it means that the school has coverage but it is not available to students directly - things such as Field Trips.

**No Rates Available!**

b. Logon

This page is for parents/guardians that have created an account on the site.

K12 Enrollment Home	MyAccount Logon	Open New Account	Browse Rates
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**Login to MyAccount**

User ID

Password

\*\* Forgot your User ID or Password?  
If so, Click --> [HERE](#)

Successful login is required in order to add/maintain students and/or add/maintain coverage.

If you forget your User ID or Password, click this [link](#). It will direct you to a page that looks like this:

K12 Enrollment Home	MyAccount Logon	Open New Account	Browse Rates
---------------------	-----------------	------------------	--------------

**Retrieve Logon Credentials**

1. To retrieve forgotten User ID,  
Enter Email Address

2. To retrieve forgotten Password,  
Enter User ID

Fill in the top field if you forgot your User ID. Fill in the bottom field if you forgot your password. Click Submit when you're done. You will receive an email with the requested information. Be sure to check your Junk mail folder if it doesn't show up in your Inbox.

c. Account

After you've browsed the rates for your district and you're ready to start signing your students up for coverage, you must first create an account. Click on "Open New Account" to start. Fill in all fields, and then click "Save New Account".

**K12 Student Insurance**

Account Details

<u>New User ID</u>	JoeTester
<u>Password</u>	*****
<u>Parent/Guardian First Name</u>	Joe
<u>Parent/Guardian Last Name</u>	Tester
<u>Email Address</u>	Joe@Tester.com
<b>Save New Account</b>	

Once your new account is created, you will be redirected to your "MyAccount" page, as shown below.

**K12 Student Insurance**

Account Details

<u>User ID</u>	JoeTester
<u>First Name</u>	Joseph J
<u>Last Name</u>	Tester
<u>Email Address</u>	Joe@Tester.com
<b>Save Changes to Account Details</b>	

From here, you can modify your account data or start adding students to your account. Click on the "Add Student" menu item to do so.

Here's an example of how your MyAccount page will look after students have been added:

<a href="#">K12 Enrollment Home</a>	<a href="#">MyAccount Home</a>	<a href="#">Add Student</a>	<a href="#">LOGOFF</a>																		
<p style="text-align: center;"><b>Account Details</b></p> <table border="1"><tr><td><b>User ID</b></td><td>JoeTester</td></tr><tr><td><b>First Name</b></td><td>Joe</td></tr><tr><td><b>Last Name</b></td><td>Tester</td></tr><tr><td><b>Email Address</b></td><td>Joe@Tester.com</td></tr><tr><td colspan="2" style="text-align: center;"><a href="#">Save Changes to Account Details</a></td></tr></table>				<b>User ID</b>	JoeTester	<b>First Name</b>	Joe	<b>Last Name</b>	Tester	<b>Email Address</b>	Joe@Tester.com	<a href="#">Save Changes to Account Details</a>									
<b>User ID</b>	JoeTester																				
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<a href="#">Save Changes to Account Details</a>																					
<p style="text-align: center;"><b>Covered Student(s)</b></p> <table border="1"><thead><tr><th><b>Student</b></th><th><b>SSN</b></th><th><b>Date of Birth</b></th><th><b>School District</b></th><th><b>Campus</b></th><th><b>Grade</b></th></tr></thead><tbody><tr><td><a href="#">Mary Tester</a></td><td>123-45-6789</td><td>01/01/2005</td><td>ABBOTT ISD</td><td>ABBOTT ISD</td><td>1</td></tr><tr><td><a href="#">Billy Tester</a></td><td>234-56-7890</td><td>01/01/2004</td><td>ABBOTT ISD</td><td>ABBOTT ISD</td><td>2</td></tr></tbody></table> <p style="text-align: center;"><a href="#">Click on Student link to view/edit details.</a></p>				<b>Student</b>	<b>SSN</b>	<b>Date of Birth</b>	<b>School District</b>	<b>Campus</b>	<b>Grade</b>	<a href="#">Mary Tester</a>	123-45-6789	01/01/2005	ABBOTT ISD	ABBOTT ISD	1	<a href="#">Billy Tester</a>	234-56-7890	01/01/2004	ABBOTT ISD	ABBOTT ISD	2
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<a href="#">Billy Tester</a>	234-56-7890	01/01/2004	ABBOTT ISD	ABBOTT ISD	2																

Click on a student's name link to open up his/her data page, as described below in the Student section of this guide.

d. Student

Once you're in the MyAccount section, you can add/maintain your students' data pages. To add a student, click on the "Add Student" menu item. You will be guided through a series of dropdown fields to get specific campus details. Here are the separate steps. As you select an entry, new options will be displayed.

Step one: Select state

Select School District / Campus	
<b>Pick State where your Student's School is Located:</b> <input type="button" value="▼"/>	

Step two: Select District

Select School District / Campus	
<b>Pick State where your Student's School is Located:</b> <input type="button" value="TEXAS"/> <input type="button" value="▼"/>	
<b>Pick your Student's School District:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	

Step three: Select Campus

Select School District / Campus	
<b>Pick State where your Student's School is Located:</b> <input type="button" value="TEXAS"/> <input type="button" value="▼"/>	
<b>Pick your Student's School District:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	
<b>Pick your Student's Campus:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	

Step four: Select Campus Type

Select School District / Campus	
<b>Pick State where your Student's School is Located:</b> <input type="button" value="TEXAS"/> <input type="button" value="▼"/>	
<b>Pick your Student's School District:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	
<b>Pick your Student's Campus:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	
<b>Pick your Student's Campus Type:</b> <input type="button" value="ABBOTT ISD"/> <input type="button" value="▼"/>	

After the Campus Type is selected, the rest of the Student Data Form is displayed.

Select School District / Campus			
<b>Pick State where your Student's School is Located:</b>		TEXAS <input type="button" value="▼"/>	
<b>Pick your Student's School District:</b>		ABBOTT ISD <input type="button" value="▼"/>	
<b>Pick your Student's Campus:</b>		ABBOTT ISD <input type="button" value="▼"/>	
<b>Pick your Student's Campus Type:</b>		Elementary <input type="button" value="▼"/>	
Student Details			
<b>First Name</b>	<input type="text"/>	<b>Last Name</b>	<input type="text"/>
<b>SSN</b>	<input type="text"/>	<b>Date of Birth</b>	<input type="text"/>
<b>Grade</b>	<input type="button" value="▼"/>	<b>Phone</b>	<input type="text"/>
<b>Perm Street Address</b>	<input type="text"/>	<b>Mail Street Address</b>	<input type="text"/>
<b>Perm Apt#/Suite#/etc</b>	<input type="text"/>	<b>Mail Apt#/Suite#/etc</b>	<input type="text"/>
<b>Perm City</b>	<input type="text"/>	<b>Mail City</b>	<input type="text"/>
<b>Perm State</b>	<input type="button" value="▼"/>	<b>Mail State</b>	<input type="button" value="▼"/>
<b>Perm Zip</b>	<input type="text"/>	<b>Mail Zip</b>	<input type="text"/>
<input type="button" value="Save New Student"/>			

Fill it out as completely as possible. The system will alert you if there are any missing required fields and/or bad data formats.

Once a student has been added, the system redirects the user to the “Purchase Coverage” page. This will be covered in the “Coverage” section of this guide.

Here is an example of a Student's data page after coverage has been purchased:

Student Details			
First Name	Mary	Last Name	Tester
SSN	123-45-6789	Date of Birth	01/01/2005
Grade	1	Phone	123-456-7890
Campus Name	ABBOTT ISD		
Campus Type	Elementary		
Perm Street Address	123 Main St	Mail Street Address	123 Main St
Perm Apt#/Suite#/etc		Mail Apt#/Suite#/etc	
Perm City	Abbott	Mail City	Abbott
Perm State	Texas	Mail State	Texas
Perm Zip	12345	Mail Zip	12345
<a href="#">Save Changes to Student Details</a>			

Coverage Purchased		<a href="#">[ Purchase Additional Coverage ]</a>					
Activity	Demographics	Marketing Plan	Rate	Paid	Effective Date	Termination Date	
At School	PK-12	Economy	\$63.00	\$63.00	08/03/2011	08/01/2012	
Injury and Sickness	PK-12	Injury and Sickness	\$102.90	\$102.90	08/03/2011	10/02/2011	
Extended Dental	PK-12	Extended Dental	\$8.40	\$8.40	08/03/2011	08/01/2012	

[\[ Make Injury and Sickness Payment \]](#)

Click **HERE** to add more coverage. To avoid duplicate coverage, the page will only display those items that you have not yet purchased.

Injury and Sickness coverage is offered in packages of 2 months, 3 months, or one year payment plans. If you originally purchased the 2 or 3 month plan, you may purchase successive 2 month plans **HERE**. As long as a follow-on plan is purchased before the current termination date + 15 days, the effective date assigned will be one day after the previous termination date.

e. Coverage (includes Shopping Cart & Checkout)

Displayed below are images depicting the order process for student, Mary Tester.

Step one: Select desired coverage. Note the alternating gray and white cells. Only one item can be selected from a color grouping. In the Injury and Sickness group, if you select the [2 Months] item, you will be offered the opportunity to setup automatic recurring 2-month payment plans. It is NOT offered if you select the [3 Months] or the [12 Months] plan.

**Purchase Insurance Coverage for Mary Tester**

Available Coverage				
	Activity	Demographics	Marketing Plan	Rate
<input type="radio"/>	24 Hour	PK-12	Economy	\$126.00
<input type="radio"/>	24 Hour	PK-12	Premier	\$193.20
<input checked="" type="radio"/>	At School	PK-12	Economy	\$63.00
<input type="radio"/>	At School	PK-12	Premier	\$92.40
<input checked="" type="radio"/>	Injury and Sickness [2 Months]	PK-12	Injury and Sickness	\$102.90
<input type="radio"/>	Injury and Sickness [3 Months]	PK-12	Injury and Sickness	\$154.35
<input type="radio"/>	Injury and Sickness [12 Months]	PK-12	Injury and Sickness	\$617.40
<input checked="" type="checkbox"/>	Extended Dental	PK-12	Extended Dental	\$8.40

[Add Selected Items to Shopping Cart](#)   [Start Over](#)   [Show Subtotal](#)

Brochures

<a href="#">MC34919-TX</a>	Accident - TX
<a href="#">MC34919 SP-TX</a>	Accidente - TX (Español)
<a href="#">TX11WHSREXX</a>	Injury & Sickness - TX
<a href="#">2011OLEF</a>	Online Enrollment Flyer

Click a link to open up a brochure.

When you are ready to submit your selections, click the “Add Selected Items to Shopping Cart” button. You will see this display:



When you click “OK” the system will bring you to the “Shopping Cart” page. From here you can select and delete unwanted items, or you can “Checkout” (pay for your items).

Shopping Cart					
	Student	Activity	Demographics	Marketing Plan	Rate
<input type="checkbox"/>	Mary Tester	At School	PK-12	Economy	\$63.00
<input type="checkbox"/>	Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
<input type="checkbox"/>	Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
				Total:	\$174.30
			<input type="button" value="Delete Selected Items"/> <input type="button" value="Checkout"/>		

Since this parent selected the [2 Months] Injury and Sickness option, Mary is now eligible to have her follow-on payments automatically deducted from her Credit Card or her bank’s checking or savings account. To do so, just click on the checkbox at the bottom of the form. Select “Credit Card” or “Electronic Check” from the dropdown below and then click “Continue Checkout >>”

Purchase Coverage - Order Details					
	Student	Activity	Demographics	Marketing Plan	Rate
	Mary Tester	At School	PK-12	Economy	\$63.00
*	Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
	Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
				SubTotal:	\$174.30
				Processing Fee:	\$5.23
				Grand Total:	\$179.53
<input type="checkbox"/>	* Click if you want automatic payments withdrawn every 2 months				
Purchase using:			Credit Card	<input type="button" value="Continue Checkout &gt;&gt;"/>	

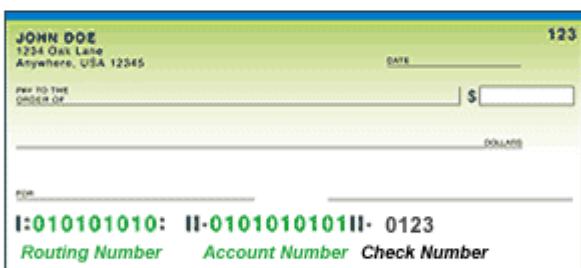
Here is the screen you'll see if you select "Credit Card".

Enter Credit Card Data				
Credit Card Number	<input type="text"/>			
Expiration Date	<input type="text"/>	/	<input type="text"/>	<input type="text"/>
Charge Amount	\$179.53			
First Name	Joe			
Last Name	Tester			
Billing Address				
Street Address	<input type="text"/>			
City	<input type="text"/>			
State	<input type="text"/>			
Zip Code	<input type="text"/>			
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Continue Checkout &gt;&gt;"/>				
Purchase Coverage - Order Details				
Student	Activity	Demographics	Marketing Plan	Rate
Mary Tester	At School	PK-12	Economy	\$63.00
Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
			SubTotal:	\$174.30
			Processing Fee:	\$5.23
			Grand Total:	\$179.53

Here's the one for "Electronic Check".

### Enter Bank Draft Data

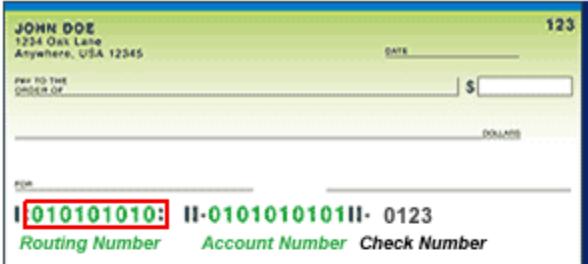
Account Type	<input type="radio"/> Checking <input type="radio"/> Savings
Name on Account	Joe Tester
Bank Name	
Routing No	
Account No	
Charge Amount	\$179.53
Billing Address	
Street Address	
City	
State	<input type="button" value="▼"/>
Zip Code	



### Purchase Coverage - Order Details

Student	Activity	Demographics	Marketing Plan	Rate
Mary Tester	At School	PK-12	Economy	\$63.00
Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
			<b>SubTotal:</b>	<b>\$174.30</b>
			<b>Processing Fee:</b>	<b>\$5.23</b>
			<b>Grand Total:</b>	<b>\$179.53</b>

Here's a completed "Electronic Check" form. Note the "Routing No" and "Account No" links below. Click on one of them to highlight (in red box) where you can find the corresponding item on your check. The example below shows where the "Routing No" can be found.

Enter Bank Draft Data				
Account Type	<input checked="" type="radio"/> Checking <input type="radio"/> Savings			
Name on Account	Joe Tester			
Bank Name	Test Bank of Texas			
<u>Routing No</u>	111900659			
<u>Account No</u>	1234567890			
Charge Amount	\$179.53			
Billing Address				
Street Address	123 Main St			
City	Abbott			
State	Texas <input type="button" value="▼"/>			
Zip Code	12345			
				
<input type="button" value="Cancel"/> <input type="button" value="Reset"/> <input type="button" value="Continue Checkout &gt;&gt;"/>				
Purchase Coverage - Order Details				
Student	Activity	Demographics	Marketing Plan	Rate
Mary Tester	At School	PK-12	Economy	\$63.00
Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
			SubTotal:	\$174.30
			Processing Fee:	\$5.23
			Grand Total:	\$179.53

When you click “Continue Checkout >>”, you are given one more chance to verify /review your data before submitting it for collection. Click on “Pay & View Receipt” to commit.

Verify/Review Bank Draft Data				
Account Type	Checking			
Name on Account	Joe Tester			
Bank Name	Test Bank of Texas			
Routing No	111900659			
Account No	1234567890			
Charge Amount	\$179.53			
Billing Address				
Street Address	123 Main St			
City	Abbott			
State	TX			
Zip Code	12345			
<a href="#" style="color: black; text-decoration: none;">Pay &amp; View Receipt</a>				
Order Details				
Student	Activity	Demographics	Marketing Plan	Rate
Mary Tester	At School	PK-12	Economy	\$63.00
Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
			<b>SubTotal:</b>	<b>\$174.30</b>
			<b>Processing Fee:</b>	<b>\$5.23</b>
			<b>Grand Total:</b>	<b>\$179.53</b>

The final screen in the process is your receipt. If you see this, then everything went well.  
Print the page for your records.

Thank you for your K-12 Student Insurance purchase.  
Please print this page for your records.

Date of Purchase	08/03/2011	Purchase Amount	\$179.53
Account Name	Joe Tester	Account Type	Checking
Bank Name	Test Bank of Texas	Account No	*****7890

Order Details

Student	Activity	Demographics	Marketing Plan	Rate
Mary Tester	At School	PK-12	Economy	\$63.00
Mary Tester	Injury and Sickness	PK-12	Injury and Sickness	\$102.90
Mary Tester	Extended Dental	PK-12	Extended Dental	\$8.40
				<b>SubTotal:</b> \$174.30
				<b>Processing Fee:</b> \$5.23
				<b>Grand Total:</b> \$179.53