How to Create an Account in PolicyCenter



Description

This job aid provides step by step instructions on how to create a PolicyCenter account.

Step 1						
Action	Screen					
 If searching in PolicyCenter, from the "Desktop" screen: Select the "Account" tab. Select "New Account" from the drop-down menu. 	11 Desktop Account Policy Search Team Administration Testing Training Live C Actions Image: Construct of the second construction of the se					
Step 2	Screen					
If coording from onother system						
 a. Enter the "First, Middle and Last Name" of the applicant. b. Ensure the "name is an exact match" checkboxes are selected. If not, select the checkboxes and run the search again. c. Select the "Search" button. d. In this example, PolicyCenter displays the message "The search returned zero results." This indicates there are no existing accounts for this person. e. If an account is found, it displays in the Search Results section. f. Since no account was found, select the "Create New Account" button. 	Class Name City C					

Step 3				
Action	Screen			
On the "Create account" screen:	1 Des <u>k</u> top	Account ▼ Policy ▼	Searc <u>h</u> ▼ _Ieam _Administration ▼ _Testing ▼	:[
• Complete all required fields.		Create accoun	Cancel	
Note: Validate the "Organization" and "Producer Code" fields. If the displayed producer code is not correct, select the desired producer code from the drop-down list.		Please confirm account informat	tion	
		Prefix First Name *	<none></none>	
		Middle Name	A	
		Last Name 🔺	Jones	
		Suffix	<none></none>	
Select the "Update" button.		Marital Status	XX ·	
		Gender	XX 👻	
		Address		
		Address Line 1 *	Street Address	
		City *	City	
		State *	State •	
		ZIP Code *	Zip	
		Country	United States of America	
		License Number	XXXXXXXXX	
		License State	State -	
		Official IDs		
		Enterprise Customer #	***_***_XXXX	
		Select Producer		
		Organization	PC Agency	
		Producer Code *	XXXXXX Agent	
Step 4				
Action	Screen			
A new account is created.	1 Des <u>k</u> top		Searc <u>h</u> ▼ <u>I</u> eam <u>A</u> dministration ▼ Testing ▼	: 0
	Actions ∷⇒	Account John A Jones	Account: XXXXXXXXXXXXXX	
	🗊 Summary	Account File Si	UMMATY Refresh Change Account Holder To 🝷	
	Contacts	Account No	XXXXXXXXXX	
	Policy Transactions	Account Name	John A Jones	
	Submission Manager	Status	Pending	
	剧 Underwriting Files	Country	City, State Zip	
	2 Related Accounts	Enterprise Customer #		
	ß <u>H</u> istory	SSN	***-***-XXXX	
		Current Activities		
		Created Date 💠 Due Date 🌲	Priority 🗢 Subject 🤤 No data to display	Assigned To
		Policy Terms Policy # Product Risk Bus	iness Type Status Effective Date Expiration Date No data to display	
		Pending Policy Transactio	ons Open 🔹	
		Create Date 💠 Transaction #	Status * Policy # Product \$ Business Type \$ Type No data to display	

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