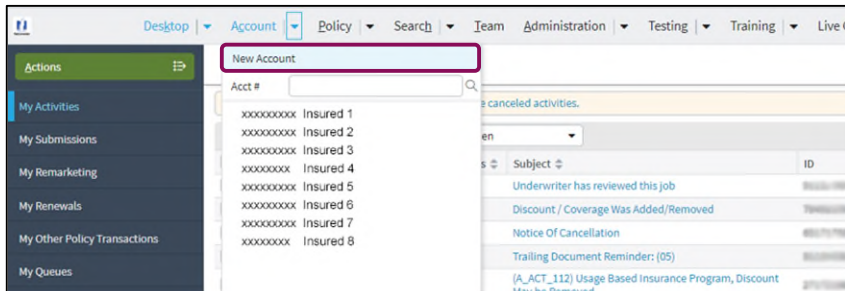


How to Create an Account in PolicyCenter

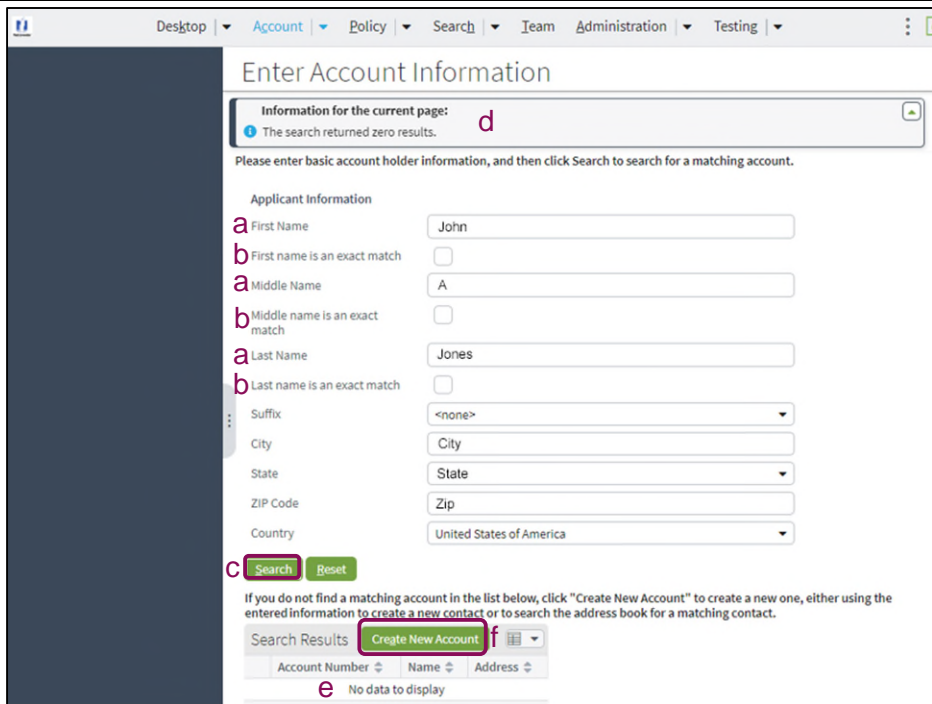
Description

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

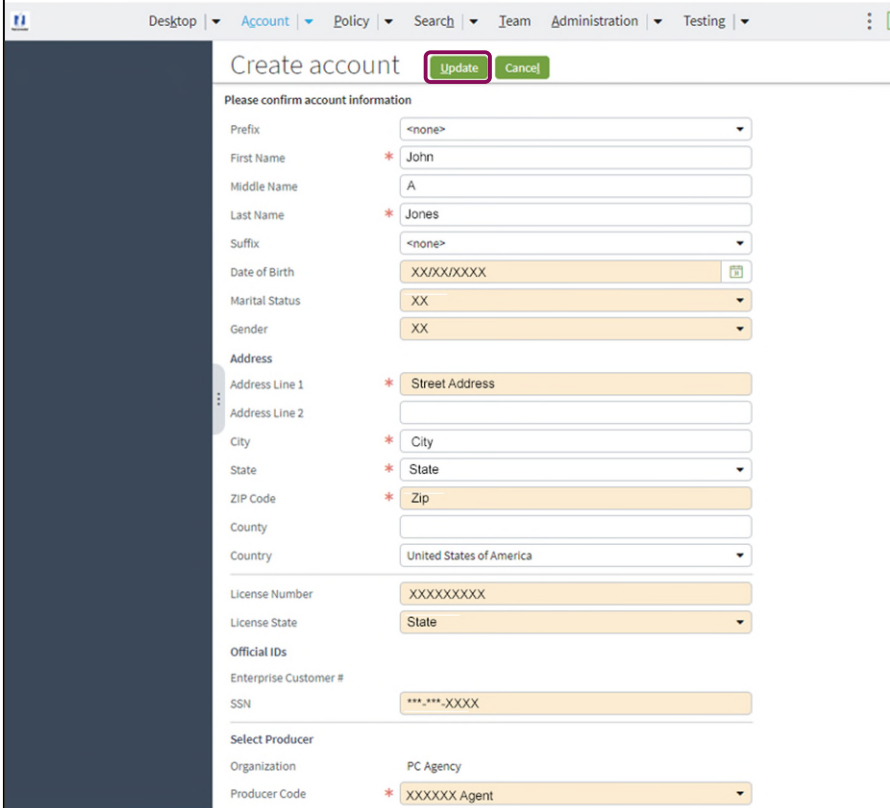
Step 1

Action	Screen
<p>If searching in PolicyCenter, from the “Desktop” screen:</p> <ul style="list-style-type: none">• Select the “Account” tab.• Select “New Account” from the drop-down menu.	

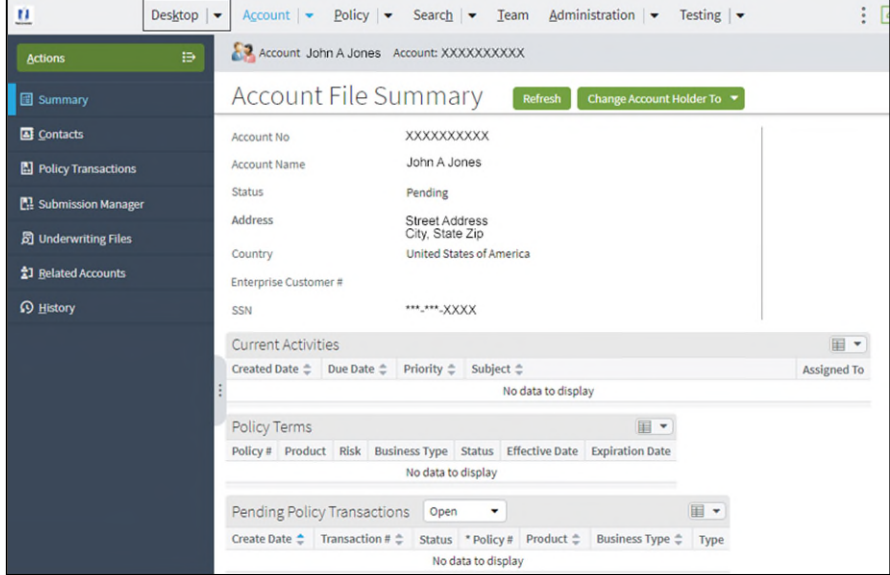
Step 2

Action	Screen
<p>If searching from another system, start the account creation process on the “Enter Account Information” screen.</p> <ol style="list-style-type: none">Enter the “First, Middle and Last Name” of the applicant.Ensure the “...name is an exact match” checkboxes are selected. If not, select the checkboxes and run the search again.Select the “Search” button.In this example, PolicyCenter displays the message “The search returned zero results.” This indicates there are no existing accounts for this person.If an account is found, it displays in the Search Results section.Since no account was found, select the “Create New Account” button.	

Step 3

Action	Screen
<p>On the “Create account” screen:</p> <ul style="list-style-type: none"> Complete all required fields. <p>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.</p> <ul style="list-style-type: none"> Select the “Update” button. 	

Step 4

Action	Screen
<p>A new account is created.</p>	

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