View Policy and Transaction History

In Brief

PolicyCenter allows you to search policy history. The policy history captures all transaction history such as coverage and address changes, and job history events for the policy associated with the account.

In this quick card, you will first search for a policy. Next, you will view policy information and transaction history. The steps to view policy history are the same regardless of business line.

IMPORTANT: For the purposes of the VTO, you can use any of the policy numbers below.

NOTE: Ensure you use the appropriate spacing when searching for a policy number.

Auto Policy	*Property Policy*	*Umbrella Policy*
9113K 501981	9113HR001014	9113PU400641

Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

Desktop screen

1. Click the down arrow to the right of the **Policy** tab.
2. Enter a policy number from the list above in the **Policy #** field.
3. Press the **Enter** key to display the policy.

Summary screen

4. Review the *Completed Policy Transactions* and *Pending Policy Transactions* sections, to view the transaction history of the policy.
5. Click the **History** link, in the *Left Navigation Bar*.

History screen

6. Review the entire history of the policy. You may filter the history dates of the policy, if needed.