

Create Policyholder Account

In Brief

In this Quick Card, you will create an account in Policy Center.

An account must be established in PolicyCenter prior to quoting, binding, or issuing a policy. Basic information such as name and address is included in the account.

Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

Create Policyholder Account

Desktop screen

1. Click the arrow to the right of the **Actions** button.
2. Select **"New Account"** from the drop-down menu.

Enter Account Information screen

3. Enter the new policyholder's **First Name** and **Last Name** in the appropriate fields.
 - You can use whatever name you wish. Be creative!
4. Enter the applicant's city, **"Indianapolis"**, into the **City** field.
5. Select the applicant's state, **"Indiana"**, from the **State** drop-down list.
6. Enter the applicant's Zip Code, **"46202"**, into the **Zip Code** field.
7. Click the **Search** button.

NOTE: If PolicyCenter displays the message, *"The search returned zero results."*, this means there are no existing accounts for this person. The next step in the process is to create a new account in PolicyCenter.

If the search returns an existing account for the user, you can still create a new/second account for this name. It could be a common name. Before you create the new account, verify search results do not contain an account for the same individual.

8. Click the **Create New Account** button.

Create Account screen

9. Enter a date into the **Date of Birth** field.
10. Enter a status into the **Marital Status** drop-down list.
11. Select a gender from the **Gender** drop-down list.
12. Enter "311 East 10th" into the **Address Line 1** field.
13. Enter "1550688990" into the **License Number** field.
14. Select "Indiana" from the **License State** drop-down list.
15. Enter "666465516" into the **SSN** field.

IMPORTANT: This is a test environment. The **Social Security Number** field is NOT a required field in PolicyCenter. When entering, you do not need to enter any dashes.

16. Select a producer code from the **Producer Code** drop-down list. If there are multiple listed, it does not matter which code is chosen.
17. Click the Update button at the top of the screen.

You have successfully created a Policyholder Account.