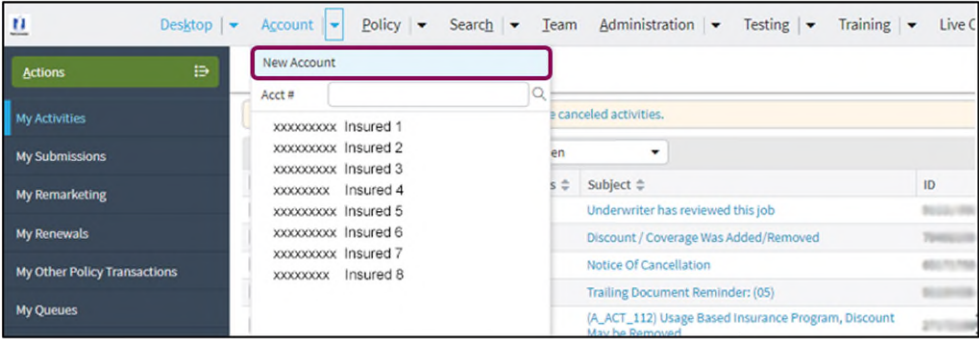


How to Create an Account in PolicyCenter

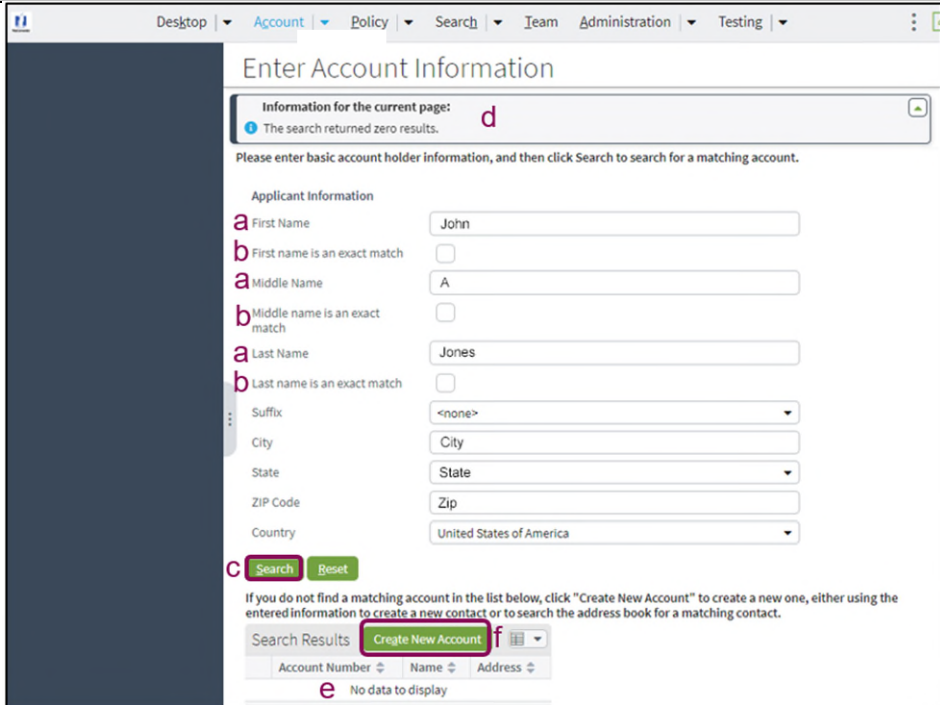
Description

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. <p>Select “New Account” from the drop-down menu.</p>	

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

On the “Create account” screen:

- Complete all required fields.

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.

- Select the “Update” button.

Screen

Desktop | Account | Policy | Search | Team | Administration | Testing

Create account

[Update](#) [Cancel](#)

Please confirm account information

Prefix: <none>

First Name: John

Middle Name: A

Last Name: Jones

Suffix: <none>

Date of Birth: XX/XX/XXXX

Marital Status: XX

Gender: XX

Address

Address Line 1: Street Address

Address Line 2:

City:

State:

ZIP Code:

Country:

Country: United States of America

License Number: XXXXXXXX

License State: State

Official IDs

Enterprise Customer #:

SSN: ***-**-XXXX

Select Producer

Organization: PC Agency

Producer Code: XXXXXX Agent

Step 4

Action

A new account is created.

Screen

Desktop | Account | Policy | Search | Team | Administration | Testing

Account: John A Jones Account: XXXXXXXXXX

Account File Summary

[Refresh](#) [Change Account Holder To](#)

Account No: XXXXXXXXXX

Account Name: John A Jones

Status: Pending

Address: Street Address
City, State Zip

Country: United States of America

Enterprise Customer #:

SSN: ***-**-XXXX

Current Activities

Created Date Due Date Priority Subject Assigned To

No data to display

Policy Terms

Policy # Product Risk Business Type Status Effective Date Expiration Date

No data to display

Pending Policy Transactions

Create Date Transaction # Status Policy # Product Business Type Type

No data to display

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