How to Search in PolicyCenter

Description

PolicyCenter offers various methods for locating submissions, policies, accounts, contacts, and activities. One method may be better than the others, depending on what kind of entry you wish to locate/open.

All procedures documented herein work in all lines of business.

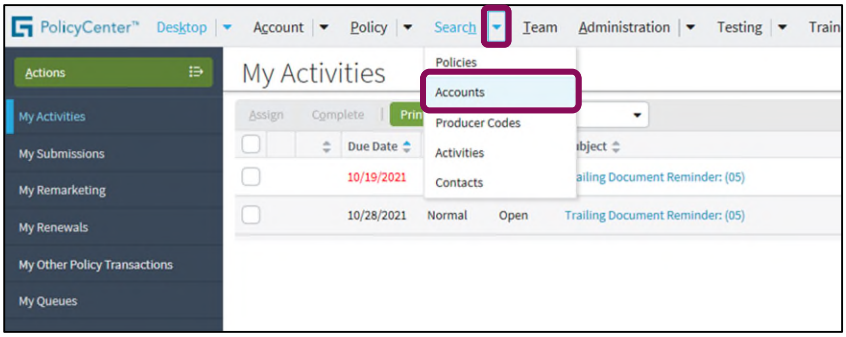
Procedures discussed in this document are:

- Search/Locate an Account
- Search/Locate a Policy Submission
- Search/Locate a Bound Policy

Part 1 – Search/Locate an Account

Use this procedure when you need to search for a specific household account. We recommend one account per household (meaning all products for this household live under this account).

Step 1

Action	Screen
From the PolicyCenter “Desktop” screen: • Select the down arrow on the “Search” tab. • Select “Accounts” from the drop-down menu.	

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Part 1 – Search/Locate an Account (cont'd)

Step 2

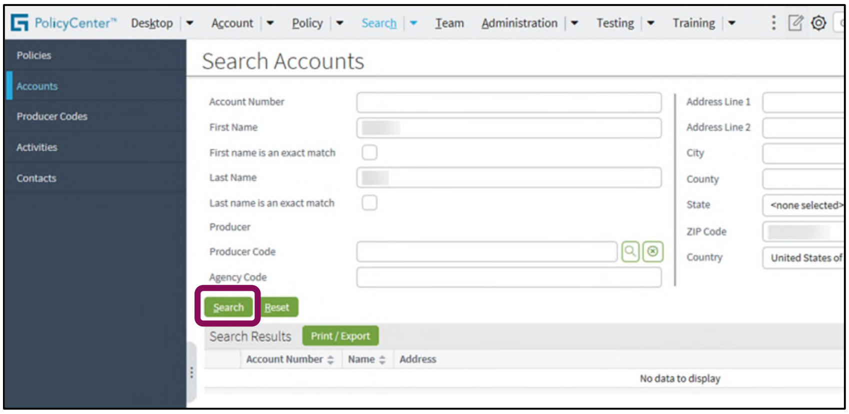
Action

On the "Search Accounts" screen:

- Enter the required information in the "First Name" and "Last Name" fields.
- If necessary, you can narrow the search by adding the policyholder's address, city, and/or state.
- By default, the "Exact Match" checkboxes are not selected. Select them to make the search more specific.
- Select the "Search" button.

Note: If you do not enter enough required information, the system displays an error indicating what fields, at minimum, must be complete to perform the search.

Screen



Step 3

Action

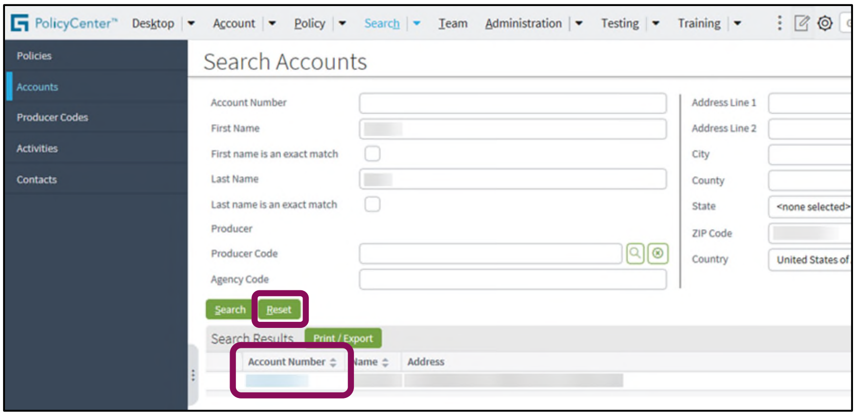
All accounts matching the search criteria you entered display in the "Search Results" section, including those where more than one Account exists for a policyholder – or there are multiple policyholders with the same name.

- Select the "Account Number" link in the "Search Results" section.

Note: If you navigate away from this screen and then return during the same PolicyCenter login session, the prior "Search Results" remain. Select the "Reset" button to clear the results if you need to perform a new search.

If you find multiple household accounts for the same policyholder, consider merging accounts. Refer to the **Merging Accounts Job Aid** for more information.

Screen



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Part 1 – Search/Locate an Account (cont'd)

Step 4

Action	Screen
See below	See below

Action

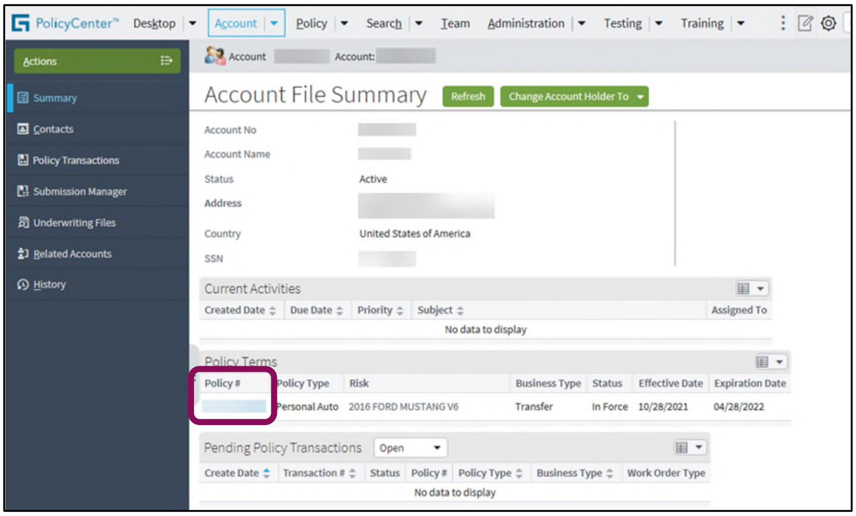
The "Account File Summary" screen displays information on policy type, business type, status, as well as effective and expiration dates.

- Under the "Policy Terms" section, select the "policy number" link in the "Policy #" column to go to the policy.
- If more than one policy exists on the account, all associated policies display in the "Policy Terms" section.

> **Note:** If more than one policy with the same policy number, search under the "Status" column and identify the appropriate term.
> - In Force = current policy
> - Scheduled = future dated
> - Expired = older policy term

In addition to retrieving existing policies from the "Account File Summary" screen, you can start a new submission, view current activities, and change the accountholder information.

Screen



Part 2 – Search/Locate a Policy Submission

Use this procedure when you need to find a submission that has been started but not bound. Submissions have not been assigned a policy number.

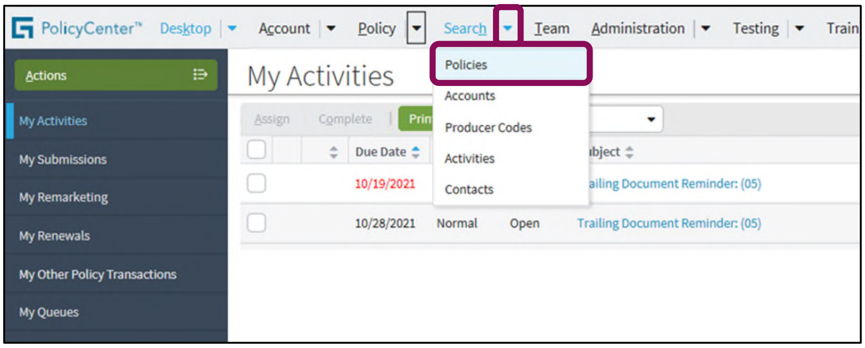
Step 1

Action

Form the PolicyCenter “Desktop” screen:

- Select the down arrow on the “Search” tab.
- Select “Policies” from the drop-down menu.

Screen



Step 2

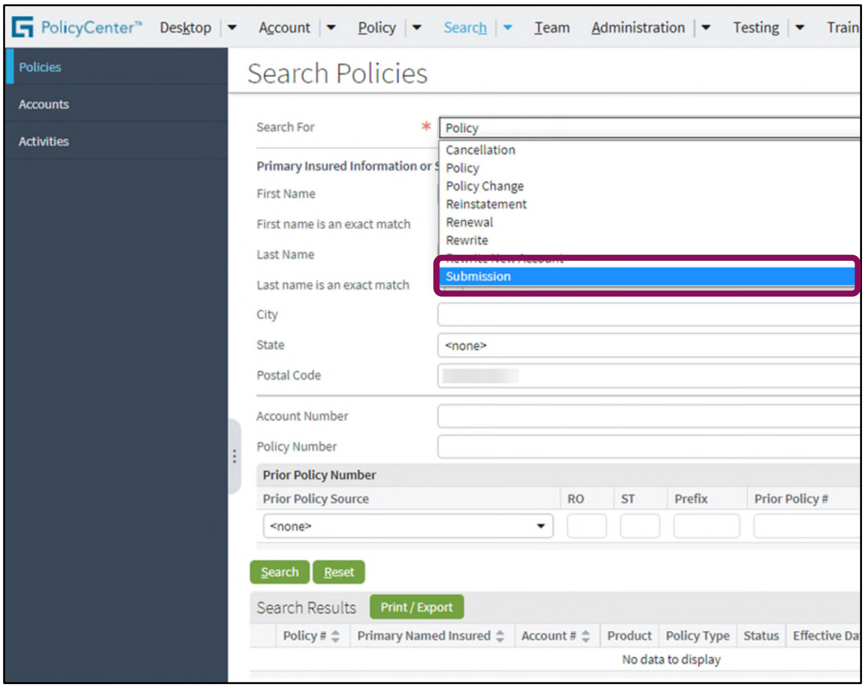
Action

On the “Search Policies” screen:

- Select “Submission” from the “Search For” drop-down list.

Note: If you leave the heading as “Policy”, you will NOT receive unissued submission results. Policy means “policies in force”.

Screen



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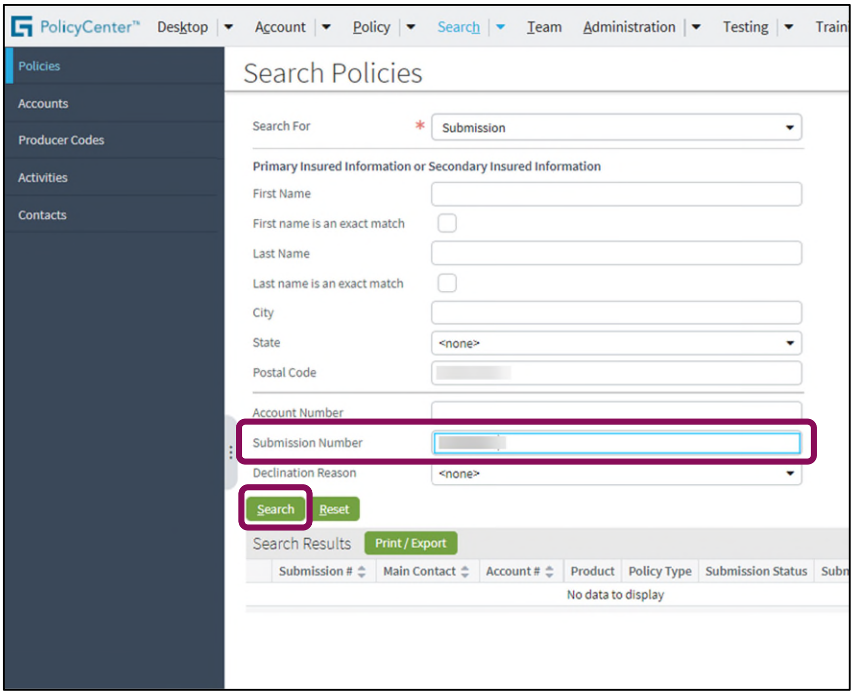
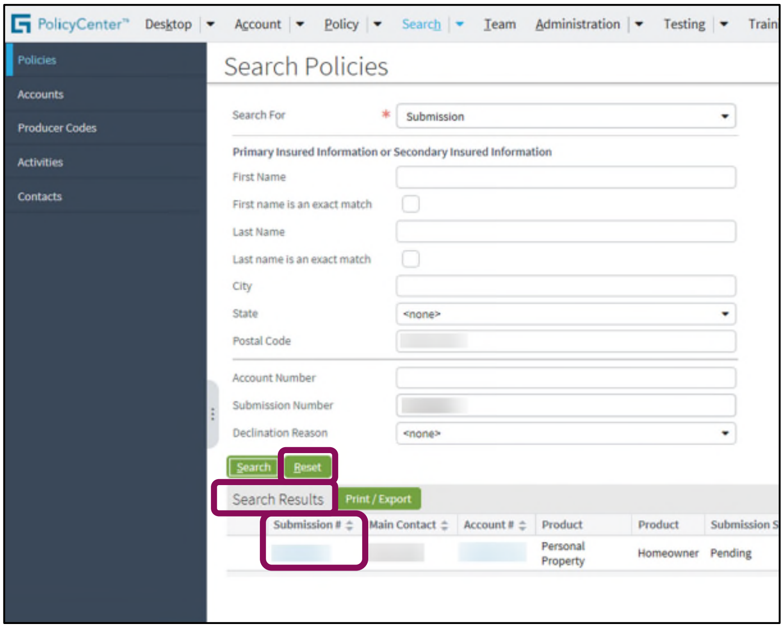
Part 2 – Search/Locate a Policy Submission (cont'd)

Step 3

Action	Screen
On the "Search Policies" screen: • If you have a submission number, use it to search for the submission. • If you do not have a submission number, use other information to identify the submission. Examples include the name or address associated with the primary or secondary named insured. • By default, the "Exact Match" checkboxes are not selected. Select them to make the search more specific. • Select the "Search" button. **Note:** If you do not enter enough required information, the system displays an error indicating what fields, at minimum, must be complete to perform the search.	

Step 4

Action	Screen
All accounts matching the search criteria you entered display in the "Search Results" section, including those where more than one Account exists for a policyholder – or there are multiple policyholders with the same name. • Select the "Submission #" link in the "Search Results" section to open the submission. **Note:** If you navigate away from this screen and then return during the same PolicyCenter login session, the prior "Search Results" remain. Select the "Reset" button to clear the results if you need to perform a new search.	

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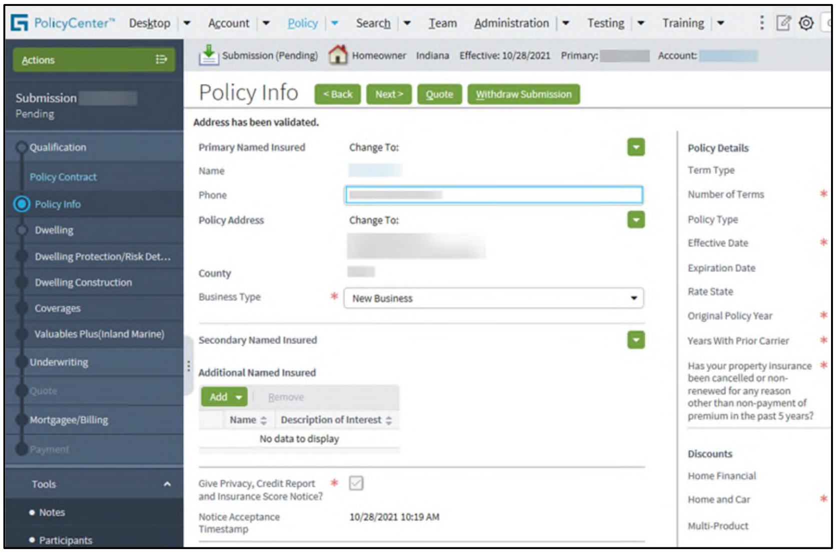
Part 2 – Search/Locate a Policy Submission (cont'd)

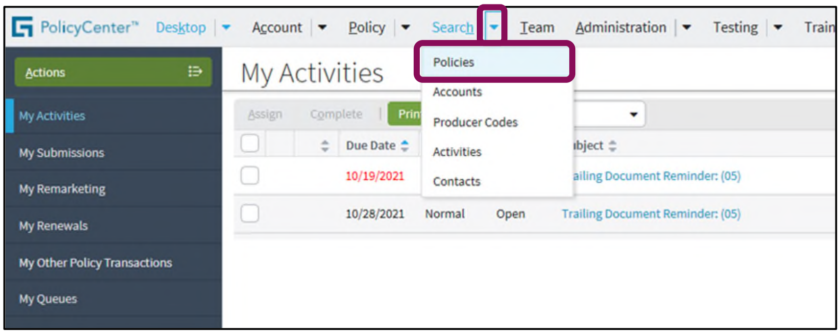
Step 5

Action	Screen
The "Policy Info" screen displays information on the selected submission.	

Part 3 – Search/Locate a Bound Policy

Use the following process when you need to search for an in-force policy and do not have the policy or account number. Searching for a policy by First and Last Name automatically returns results for the Primary and Secondary Named Insured listed on the policy, making it easier and quicker to locate the desired policy in PolicyCenter.

Step 1

Action	Screen
From the PolicyCenter "Desktop" screen: • Select the down arrow on the "Search" tab. • Select "Policies" from the drop-down menu.	

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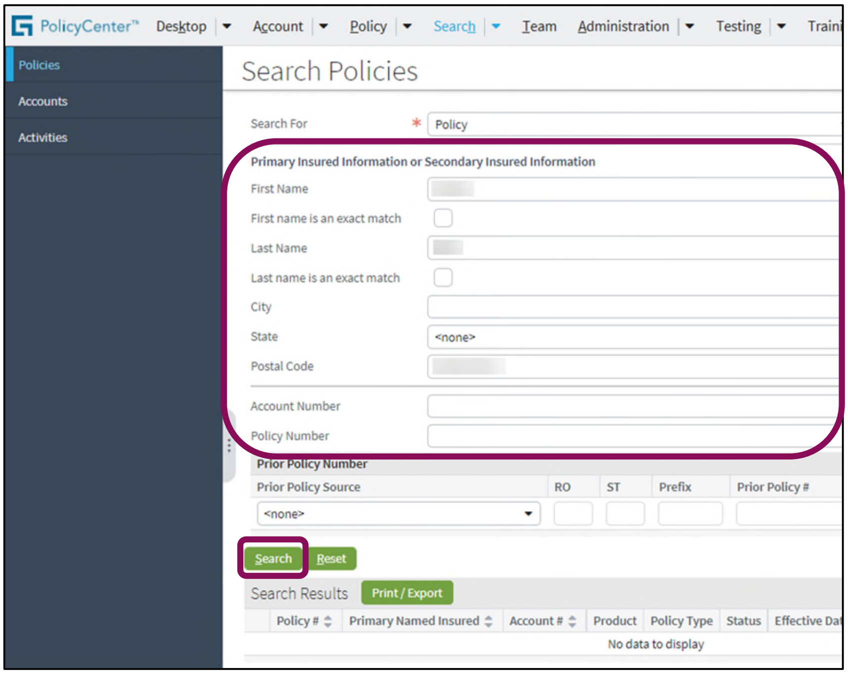
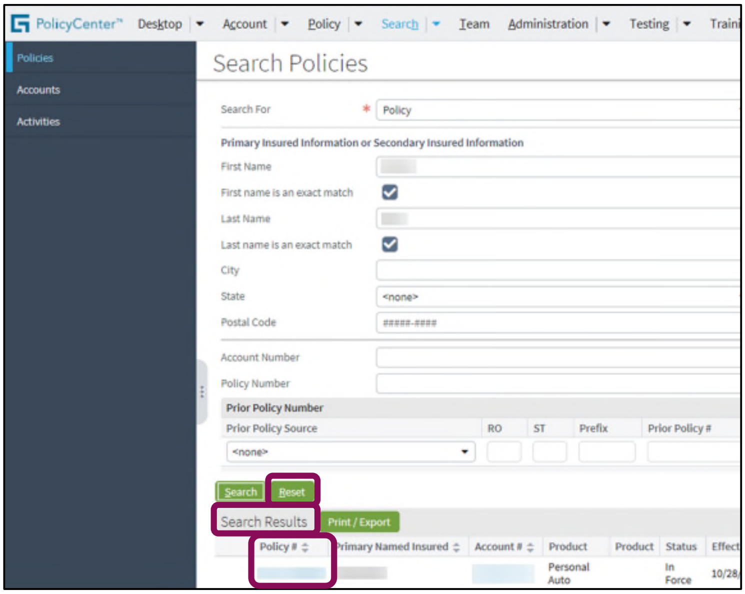
Part 3 – Search/Locate a Bound Policy (cont'd)

Step 2

Action	Screen
On the "Search Policies" screen: • Enter the necessary information in the "First Name" and "Last Name" fields. • If necessary, you can narrow the search by adding the policyholder's city, state, and/or postal code. • By default, the "Exact Match" checkboxes are not selected. Select them to make the search more specific. • You can also search by entering the "Account Number" and/or "Policy Number" in their respective search fields. • Select the "Search" button. **Note:** If you do not enter enough required information, the system displays an error indicating what fields, at minimum, must be complete to perform the search.	

Step 3

Action	Screen
All accounts matching the search criteria you entered display in the "Search Results" section, including those where more than one Account exists for a policyholder – or there are multiple policyholders with the same name. • Select the "Policy #" link in the "Search Results" section to open the submission. **Note:** If you navigate away from this screen and then return during the same PolicyCenter login session, the prior "Search Results" remain. Select the "Reset" button to clear the results if you need to perform a new search.	

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Part 3 – Search/Locate a Bound Policy (cont'd)

Step 4

Action	Screen
The "Summary" screen displays information on the selected policy.