



# Access, Search, Edit, and Delete Notes in PolicyCenter

## Description:

Use this job aid to access, search, edit, and delete Notes in PolicyCenter. You will need access to PolicyCenter to open a policy.

The screenshot shows the PolicyCenter Desktop interface. The top navigation bar includes links for Account, Policy, Search, Team, Administration, Testing, and Training. The left sidebar contains a 'Tools' section with options like Summary, Contacts, Participants, and Notes (highlighted with a red box). The main content area is titled 'Notes' and features search filters for Text Search, Author, Language, Sort By, and Sort Order. Below the filters is a table of notes with columns for Info and Details. The first note is dated Nov 21, 2021, at 12:01 PM, titled 'SmartRide Device Installed', and mentions that the client has informed the device is now installed. The second note is dated Nov 14, 2021, at 8:42 AM, titled 'Usage Based Insurance Program, Discount May be Removed', and mentions that the SmartRide Device program requires the provided device be installed in 3HGGK5H83FM701347 2 days of program enrollment, or that vehicle's program will be cancelled. 30 days have elapsed since SmartRide Device program. To prevent the program from cancelling within the next 15 days, the designated vehicle. Reminder emails have also been sent to the member regarding their need to cor

To access from any screen, click the **Notes** link in the *Tools* section.

### To Search:

- The top half of the screen displays search criteria. Use the search criteria to filter the note results.
- The bottom half of the screen displays any notes created in PolicyCenter (if any).

### To Edit an existing note:

1. Click the **Edit** button.
2. Make the necessary changes.
3. Click the **Update** button.

**Note:** Users may only edit notes they have added to a policy. Typically, a user edits a note for additional clarification. Notes entered by other users can be viewed, but not edited.

### To Delete an existing note:

- Click the **Delete** button.

**Note:** Users may only edit notes they have added to a policy. Typically, a user deletes a note when it is no longer relevant / needed. Notes entered by other users can be viewed, but not deleted.

**Warning:** When deleting a note, you do NOT receive a confirmation pop-up note. The original note **CANNOT** be retrieved.