

How to Create an Account in PolicyCenter



Description

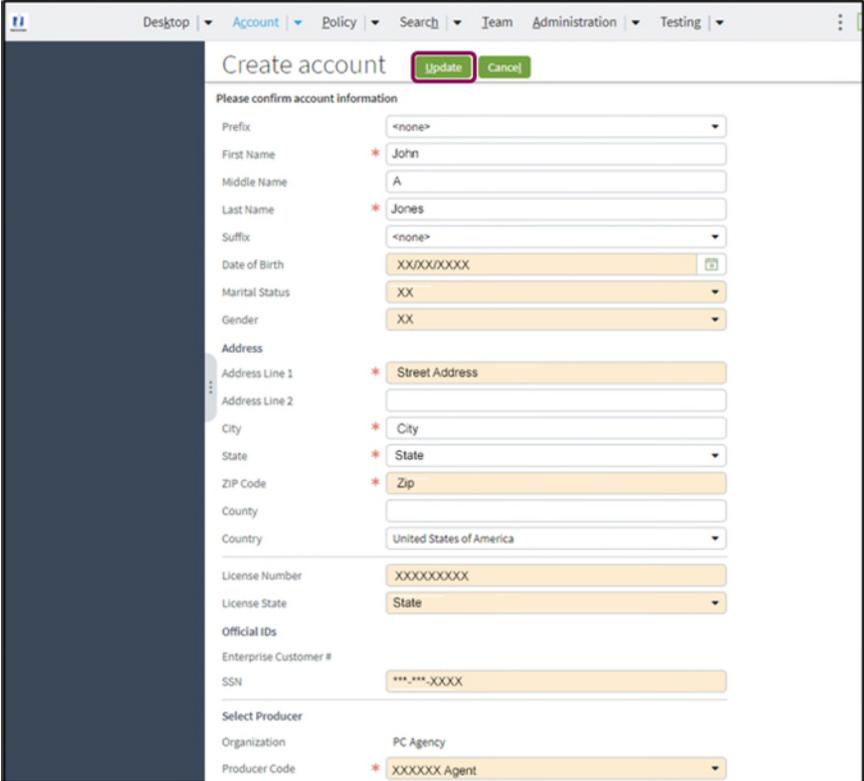
This job aid provides step by step instructions on how to create a PolicyCenter account.

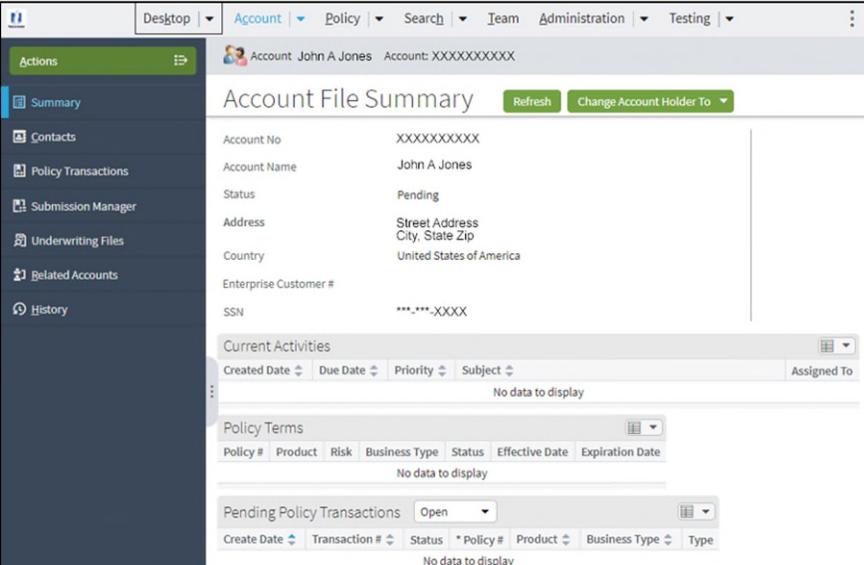
Step 1

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>	<p>The screenshot shows the PolicyCenter Desktop interface. The 'Account' dropdown menu is open, and 'New Account' is highlighted. Below the menu, a list of existing accounts is visible, each with a masked account number and an 'Insured' status.</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. 	<p>The screenshot shows the 'Enter Account Information' screen. The search results section displays a message: 'The search returned zero results.' Below this, there is a 'Create New Account' button highlighted in green. The form fields for applicant information are visible, including First Name, Middle Name, Last Name, Suffix, City, State, ZIP Code, and Country.</p>

Step 3	
Action	Screen
<p>On the “Create account” screen:</p> <ul style="list-style-type: none"> Complete all required fields. <p>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.</p> <ul style="list-style-type: none"> Select the “Update” button. 	

Step 4	
Action	Screen
<p>A new account is created.</p>	

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