



Search and Display Policy Information

Purpose

In this scenario card, you'll search for and navigate to a policy and look for key information in PolicyCenter.

Helpful Hints

If you wish to complete this scenario without having to create an account and policy from scratch, please review the *Procedure* section below for more details.

Procedure

Please reference the [VTO User Guide for Associates](#) for more details on how to log in and use the VTO.

You can link to PolicyCenter directly: <https://clpolicycentertraining.nationwide.com/>

For this scenario, you can search for a policy in one of two ways:

- Set up an account, create and issue your own policy, then follow the steps below
 - (Please refer to: **Set-Up an Account in ClearQuoteSM** and **Create a Quote in ClearQuoteSM** scenario cards)
- You can select and search from the list of Practice Accounts

Practice Accounts			
1.	3501640285	11.	3501640296
2.	3501640284	12.	3501640295
3.	3501640286	13.	3501640294
4.	3501640288	14.	3501640297
5.	3501640287	15.	3501640299
6.	3501640289	16.	3501640300
7.	3501640290	17.	3501640305
8.	3501640291	18.	3501640301
9.	3501640292	19.	3501640298
10.	3501640293	20.	3501640307

Scenario Card

Desktop Screen

1. Click the **Search** drop-down in PolicyCenter and select **Policies** from the drop-down menu.

Search Policies Screen

IMPORTANT: You can search for a policy via any of the available fields. In this example, we will search for the policy by entering the policy number.

2. Enter the applicable policy number in the **Policy Number** field.
3. Click the **Search** button.



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IMPORTANT: All search results matching the information you entered displays in the *Search Results* section.

4. Click the appropriate policy number in the **Policy #** column to go to the *Policy Summary* screen.

Policy Summary Screen

- The grey strip at the top of the screen displays key information at a glance.
 - This screen provides the following: policy and product number, effective dates, related account, agency and producer of record and current, completed and pending policy transactions.
 - Specific information is displayed depending on your role in PolicyCenter.
5. Click the **Policy Info** link (located in the Left Nav) to go to the *Policy Info* screen.

Please Note: The *Policy Info* screen displays general policy information such as:

- First Named Insured
- Policy Details
- Producer of record and service