



Search for a Policyholder Account and Search for a Policy

In Brief

In this Quick Card, you will search for an account using three different search criteria. Another option is to search for an actual policy. Next, you will search for a policy using the policy number.

Log in to the [VTO](#) using the appropriate generic user account from the [VTO Information Guide](#) document.

Quick Card

Search for a Policyholder Account

Desktop screen

1. Click the down arrow to the right of the **Search** tab.
2. Select “**Accounts**” from the drop-down menu.

Search Accounts screen

NOTE: If the person for whom you are searching has a name with two or fewer letters, select the **First/Last name is an exact match** checkbox(es) prior to starting the search.

If you search using anything fewer than the entire first and/or last name, deselect the **First/Last name is an exact match** checkbox(es) prior to search. PolicyCenter requires you to enter at least three (3) characters in a name field to narrow the search results.

3. Enter the policyholder’s first name, “**Veronica**”, into the **First Name** field.
4. Enter the policyholder’s last name, “**Salt**”, into the **Last Name** field.
5. Click the **Search** button.

NOTE: It is possible a search could return more than one results if there are multiple people with the same name in the system or the policyholder has multiple accounts.

6. In the *Search Results* section at the bottom of the screen, click the account number link for “**6955781611**” in the **Account Number** column.

Account File Summary screen

7. Review the *Account File Summary* screen.
8. Click the **Desktop** tab to return to the Desktop.



Search for a Policy via the Search tab

Desktop screen

1. Click the down arrow to the right of the **Search** tab.
2. Select “Policies” from the drop-down menu.

Search Policies screen

3. Enter the policyholder’s policy number, into the **Policy Number** field.

IMPORTANT: For the purposes of the VTO, you can use any of the policy numbers below. Ensure that you use the appropriate spacing when searching for a policy number.

Auto Policy

9113K 502389

Property Policy

9113HR001422

Umbrella Policy

9113PU400646

4. Click the **Search** button.
5. In the *Search Results* section at the bottom of the screen, click the link in the **Policy #** column.

Summary screen

6. Review the *Summary* screen for the policy.
7. Click the **Desktop** tab to return to the Desktop.



Search for a Policy via the Policy tab

1. Click the down arrow to the right of the **Policy** tab.
2. Enter one of the policy numbers below in the **Policy #** field.

Auto Policy

9113K 502389

Property Policy

9113HR001422

Umbrella Policy

9113PU400646

3. Hit [Enter] to return the policy. You may also click the **Magnifying Glass** () button to the right of the **Policy #** field.