VM Instructions

If you do not have access to a VM, please read the Introduction to determine the next steps.

If you have access to a VM as part of your course, you would have received an email from CloudShare which contains a link and instructions to start your VM.

After you have started the VM, follow these steps to start the PolicyCenter application:

1. Locate the **PolicyCenter Shortcuts folder** on the **Desktop**
2. Open the **PolicyCenter Shortcuts** folder
3. From the file list double-click **Start PolicyCenter**
    a) This will open a command prompt window. Several messages related to PolicyCenter's startup appear in the window. When the steps are finished, you will see the following message in the command prompt window.

    ```
    ******PolicyCenter ready******
    ```

    b) Leave the command window open (minimize if needed).
    c) It is easy to miss the "ready" message since PolicyCenter continues to process activities after displaying the notice. If you have waited three minutes or more without seeing the message, go to step 4 and open Chrome. The percentage will remain at 0%, it may be disregarded.
4. Open **Chrome** from the bottom bar of the VM
5. In the **browser,** connect to the following **URL:**

    ```
    http://localhost:8180/pc/PolicyCenter.do
    ```

6. When you are **finished working** on training for the day**,** you must **manually stop the application server.**
    a) To stop the server, click on the Stop PolicyCenter shortcut in the folder PolicyCenter Shortcuts. This will open a command prompt window to shutdown PolicyCenter.
    b) After shutting down PolicyCenter, both of the command prompt windows will close..

Login Credentials

Important!

How do you log in?

Instructor-led courses

To keep each student's work separate in the single instance of the running application, use your assigned username **studentXX** (**WHERE XX IS REPLACED BY THE NUMBER ASSIGNED TO YOU BY THE INSTRUCTOR)** and password **gw**. Ask your instructor for more information, if needed.

Wherever “XX” occurs in an instruction, replace XX with your student login number or use 01 for your own instance of PolicyCenter.

Self-study

Since you are working in your own VM, use the credentials **student01** and **gw** to log in to PolicyCenter. Wherever “XX” occurs in an instruction, replace XX with your student login number or use 01 for your own instance of PolicyCenter.

Sample Accounts

If the large sample data is loaded in PolicyCenter, it will contain the following sample accounts for you to use to complete the exercises. It is recommended that you follow all the labs to create your own new accounts.

Account No.	Type	First Name	Last Name
C000143542	Person	Ray	Newton
B000457766	Person	Erica	Billings
C000456353	Person	Mary	Taylor
C000148456	Person	Bill	Kinman

Account No.	Type	Company Name
C000212105	Company	Wright Construction
C000478975	Company	Big Lake Bakery
C000478567	Company	Calloway Cheese Factory
A000377655	Company	Dominion Logistics

Lesson 1 Accounts

Review

Why does PolicyCenter present the search page for the account when I try to create a new account? I know the account doesn't exist.

Name clearance ensures that a person or company is not an existing account and that they are not represented by another producer for the given policy type. PolicyCenter always searches for an account during its initial creation, checking the name against one or more producer or account databases.

Name clearance is a relevant issue when the same account requests quotes or policies at different times and yet are not providing the exact same name (such as a company known as "Demo Deliveries", "Demo Deliveries Inc.", and "Demo Delivers"). PolicyCenter checks to see if the named account exists. Based on the customer's business needs, the end user can choose an existing account (if found) or create a new account.

Important!

Before starting this activity, please make sure you have followed and understood the VM instructions. The PolicyCenter application server must be running in the VM. This is indicated by the message `***PolicyCenter ready***`.

1.1 Searching for an account

Activity

In this activity, you will search for an account. If you try to create a new account, you must go through an account search.

1. **Log in to PolicyCenter using studentXX/gw**
2. **Search for an account for Erica Billings**
   a) Select **Search** from the top menu
   b) Enter **First name**: Erica, **Last name**: Billings
   c) How many search results did you get?
3. **Click on the account number of the first (or only) result**
   a) What screen do you see now?
   b) What is the Producer Code associated with this account?

1.2 Creating a new account

Activity

Create a new account before you can do anything related to policies.

1. **Click the down arrow next to Account in the top menu and click New Account**

2. **You will be prompted to search for the account whenever you try to create a new account**
   a) Enter **Company Name**: Dinah's Diner XX
   b) Click Search
3. **Click Create New Account → Company. Enter the following details:**
   a) **Address**: 4562 Davies Drive, Portland, OR 97201
   b) Address type: business
   c) **FEIN** number: XX-1111111
   d) **Industry code:** use the search option (the magnifying glass) and the classification field to search for "full-service restaurants" or "Eating Places". Select the appropriate search result.
   e) In the **Select Producer** section, use the search option to find the **organization,** Armstrong & Company
   f) After selecting the organization, add the **producer code** from the dropdown list. Select Armstrong (Premier).
4. **At the top of the Create Account screen, select Update to create the new account**
   a) Does the account have an account number?
   b) What screen is displayed after the account is created?

1.3 Account related information

Activity

Find supporting information for an account.

1. **Find the account for Erica Billings using the Search function**
2. **Using the navigation pane on the left, locate and note the following supporting information for the account**
   a) How many contacts does the account have?
   b) What is the **Location Code** for the primary account file location?
   c) Are there any Account File Participants?
   d) Based on the account information, are there any **Policy Transactions**? Describe them.
   e) Go to the **Submission Manager**. Using the dropdown filter, find and list any completed submissions on this account.
   f) Are there any **underwriting files** associated with this account? How many?
   g) Skip Documents, Notes, Claims and Billing. These screens relate to other lessons or integrated configurations.
   h) Select **History**. What is the most common type of event listed for this account?

Stop

1.4 Solutions

1.4.1 Searching for an account

Solution

1. **Log in to PolicyCenter using studentXX/gw**
2. **Search for an account for Erica Billings**
   a) Select **Search** from the top menu
   b) Enter **First name**: Erica, **Last name:** Billings
   c) How many search results did you get?

      1

3. **Click on the account number of the first (or only) result**
   a) What screen do you see now?

      Account Summary

   b) What is the **Producer Code** associated with this account?

      100-002541

1.4.2 Creating a new account

Solution

4. **At the top of the Create Account screen, select Update to create the new account**
   a) Does the account have an account number?
      Yes.
   b) What screen is displayed after the account is created?
      Account Summary

1.4.3 Account related information

Solution

1. **Find the account for Erica Billings using the Search function**
2. **Using the navigation pane on the left, locate and note the following supporting information for the account**

   a) How many contacts does the account have?

      8

   b) What is the **Location Code** for the primary account file location?

      0000

   c) Are there any Account File Participants?

      Yes, the creator.

   d) Based on the account information, are there any **Policy Transactions**? Describe them.

      Submission, Renewal

   e) Go to the **Submission Manager**. Using the dropdown filter, find out and list any completed submissions on this account.

      Personal Auto Full Application in a Bound state

   f) Are there any **underwriting files** associated with this account? How many?

      Yes, 2.

   g) **Skip** Documents, Notes, Claims and Billing. These screens relate to other lessons or integrated configurations.

   h) Select **History**. What is the most common type of event listed in the history for this account?

      Renewal

1.5 References

1.5.1 Tips and key points

Review

The purpose of an account: Why do I need an account?

Working with an account gives PolicyCenter users the flexibility to create and manage a customer's account independent of the policies with which the account may be associated. The ability to manage an account separately from a policy can be useful when assigning visibility into policies and accounts to different users.

Review

What is an organization, and why do I need it to create an account?

An organization is what PolicyCenter uses to refer to an insurer or producer. When you create an account, you must tie the account to a specific producer and the producer’s organization. You can learn more about organizations in the context of the PolicyCenter *Community Model*.

Review

What is a producer, and why do I need a producer code to create an account?

A producer is a generic term for a third party that brings business to the insurer. The producer code identifies the sales agent who sold the policy. By including it during account creation, the insurer can track the originating agent or agency. Sometimes, producers can pre-qualify an applicant. In PolicyCenter, producers are specified in the account information using a producer code, which is entered when creating the account.

Cookbook Recipe

Steps to create a new account

1. **Account → New Account**
2. **Enter desired Account information and proceed with the Account search**
3. **Create New Account**
4. **Enter all required Account information**
5. **Update**

1.5.2 Terms and definitions

Term	Definition
Producer	A third-party bringing business to the insurer.
Producers of record	Brings business to an insurer but may not be actively servicing an account.
Producers of service	May or may not have brought the business to the insurer but is the party servicing the account.
Producer code	A unique identifier assigned by the insurer to track the agent or agency responsible for a policy or account. The producer code is used to control account access and identifies the sales agent who sold the policy.
Organization	A business entity representing either the insurer or a producer.
Insurer	A company providing insurance to applicants.
Underwriter	An employee of the insurer who assesses the insurability of applicants to determine if it is economically advisable and the associated costs.
Participant	A participant is a PolicyCenter user working directly or indirectly (a producer) for the insurer and is assigned to an account with given role.
Contact	A person or organization related to the account.
Locations	A physical location relevant to an account's insurance needs. May or may not have buildings or other structures on it.
Submission Manager	A screen within PolicyCenter where multiple submissions on an account can be viewed.
Related Accounts	Accounts that may have importance to the current account. The relationship type is user-defined and configurable. There are three out-of-the-box relationships available.