



Searching in Policy Center

This job aid discusses the most commonly used ways to search within Policy Center.

To Search By	Use the following field(s)
Transaction Number	1
Policy/Reference Number	2
Primary Insured Name	3
Business Name	4
Account Number	5
Location Address	6

The **Search Tab** opens a screen with multiple search options. The **Transaction Search** is the simplest option in Policy Center.

Desktop | Account | Policy | **Search** | Team | Administration

Transaction | Search Transactions

Policies
Accounts
Activities
Contacts

Transaction # T [] 1
Reference # TWIA- [] 2

Primary Insured Information

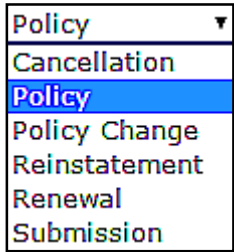
First Name John []
First name is an exact match
Last Name Smith [x] [] 3
Last name is an exact match
Business Name [] 4
Business name is an exact match

Search [] Reset []

Once you complete a search, the bottom of the screen will show the search results including the status of the Transaction (note this is not the Policy status).

Account #	Policy #	Transaction #	Primary Name Insured	Status	Proposed Policy Period	Policy Type	Location Address	Agency
A000222555	TWIA-000211800-01	T000111222	John Smith	In Force	10/14/2015 - 10/14/2016	Residential	123 Anywhere Street Corpus Christi, TX 78401-3425	USAA

The **Search Tab** also contains a **Policies Search** in the sidebar.



The dropdown menu for the “Search For” field is an important piece of the Search Tab. This menu provides various options to search by in Policy Center. Be sure to select the appropriate option so that you instruct Policy Center to search for the correct criteria. For example, if searching for a Renewal, verify that you have selected Renewal in this drop down menu before clicking the Search button at the bottom of the screen.

The screenshot shows the 'Search Policies' interface. The 'Search For' dropdown menu is circled in red. The 'Policies' sidebar item is highlighted in red. The 'Search' button is highlighted in red. A red bracket groups the 'Street Address' fields with the number '6'. A red number '5' is next to the 'Account #' field.

Transaction	Search Policies	Agency Information
Policies	Search For: * Policy	Agency Name: [text box]
Accounts	Primary Insured Information	Producer Code (TWIA #): [text box]
Activities	First Name: [text box]	As of Date: [date picker]
Contacts	First name is an exact match: <input type="checkbox"/>	
	Last Name: [text box]	
	Last name is an exact match: <input type="checkbox"/>	
	City: [text box]	
	State: <none selected>	
	Postal Code: [text box]	
	Phone: [text box]	
	Business Name: [text box]	
	Business name is an exact match: <input type="checkbox"/>	
	Account #: A [text box] 5	
	Policy #: TWIA- [text box]	
	Renewed from Policy #: [text box]	
	Risk Location Information	
	County: <none selected>	
	Street Address	
	Street Number: [text box]	
	Direction: <none selected>	
	Street Name: [text box] 6	
	Type: <none selected>	
	City: <none selected>	
	State: Texas	
	ZIP Code: <none selected>	
	Search [button] Reset [button]	