

Policy Center Job Aid Work Queue Preferences



This job aid will show you how to update your Work Queue Preferences in Policy Center.

Only your Agency Administrator has the authority to adjust these settings.

From the Administration Tab, click on the Agency Name, and then click on Edit.
Once your preferences have been chosen, click Update to save your selections.

Organization: XYZ Insurance Agency

Update Cancel Edit

Basics Users Locations

Name: XYZ Insurance Agency
Type: Agency
Agency Status: Eligible

Primary Contact: Change To:
Name: Bob Smith
Phone: 512-555-1212

Group
Description:
Supervisor: Bob Smith

Work Queue Preferences

Activity Assignment * Producer My Queues

Inactive User or Migrated Renewal * My Queues Primary Contact

* Activity Assignment routes the activities on policies based on the selection made above
* When there is an inactive user or no producer on the policy/transaction, all activities will be routed based on the selection made above

This option will route incoming activities to either the Producer/User assigned to the policy or to the general queue, "My Queues."

This option will route Migrated Renewals and incoming activities that are assigned to an Inactive User to either the general queue, "My Queues" or the Primary Contact for your agency.

Actions

- My Activities
- My Accounts
- My Submissions
- My Renewals
- My Other Transactions
- My Queues**
- Invoices

If the Administrator sets either preference to the general queue, "My Queues", located on the Desktop, review this section to retrieve work.