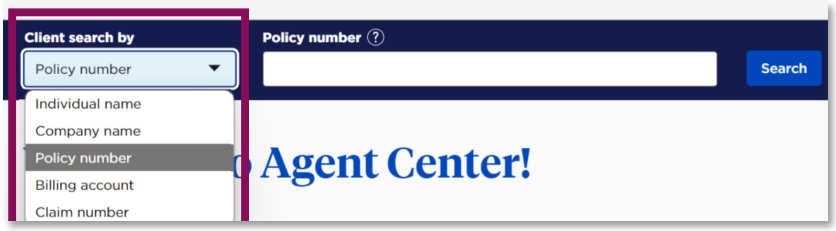
Client Search & View Client Summary in Agent Center

Description

This job aid will walk you through searching for a client on the Agent Center Workspace home page and includes steps to view the Client Summary.

Client Search

Agent Center Home Page

Action	Screen
You can search for a client several ways. To **search by individual name,** select “Individual name” from the “Client Search by” drop down. Enter the individual name (last name required) and zip code and select “Search.” To **search by Company** (Commercial or Farm), select “Company name” from the drop down, enter the company name and zip code and select “Search.” To **search by Policy number**, select “Policy number” from the drop down, enter the policy number and select “Search.” To **search by Billing account**, select “Billing Account” from the drop down, enter the Billing Account number and select “Pay Bill” or “Search.” To **search by Claim number**, select “Claim number” from the drop down, enter the claim number and select “View claim.”	 For appropriate Policy, Billing account and Claim number format, select the question mark.

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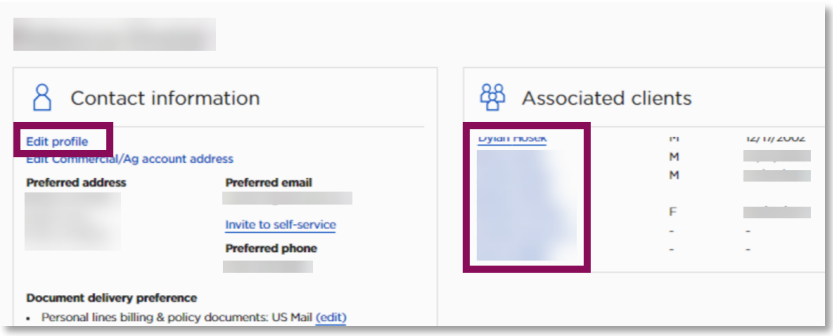
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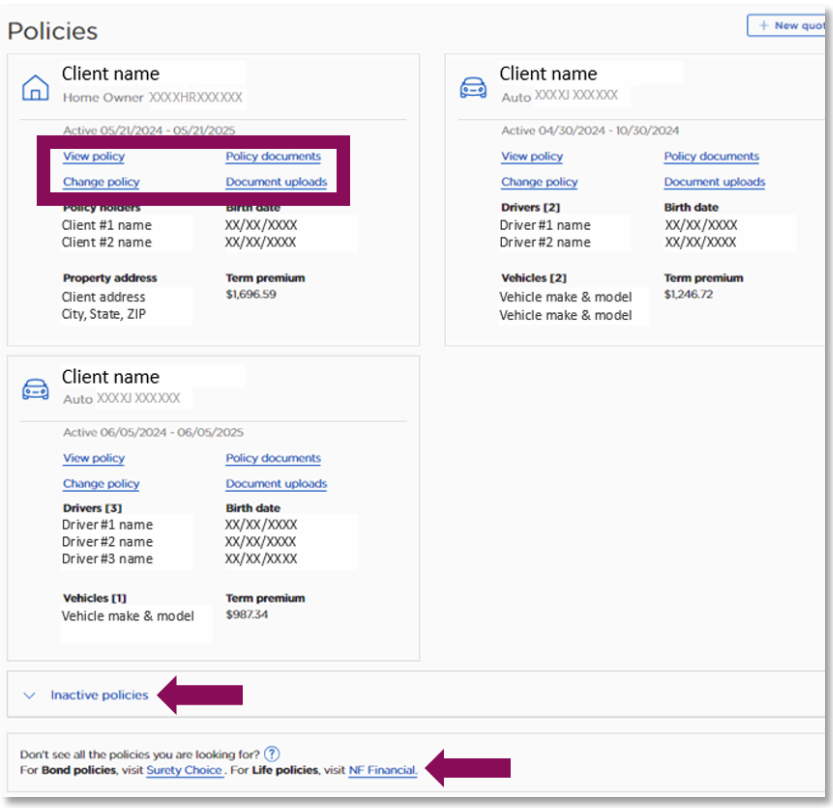
View Client Summary

Step 1

Action	Screen

The Client Summary page displays based on a client search. You can view either by scrolling through the client summary, or by selecting the information in which you are most interested in the “Jump To” bar.
• The client’s “Contact Information” displays in the first tile based on the name entered in the “Individual Name” or “Company Name” search.
• The “Edit Profile” link is directly under the “Contact information section.
  ○ Note that this link is only available on individual names or contacts.
  ○ Changes made in “Edit Profile” do not change the PL billing and policy document address.
	
	• Selecting a different name in the “Associated clients” tile will display the client summary for that individual.
	• Edit/update as needed.

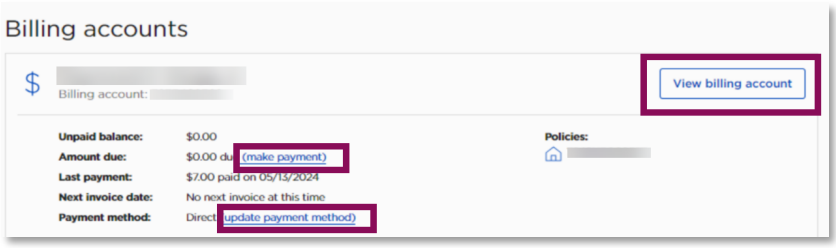
Step 2

Action	Screen
The “Policies” tiles will display any active policies for Personal Lines, Commercial Lines and Agribusiness. Each policy tile will have action items that you can take on the policy such as “View Policy,” “Change Policy,” “Policy Documents,” and “Document Uploads.” Commercial and Agribusiness policies will display by account level. Below the Policy tiles: • You can also select a drop-down for any “Inactive Policies” if applicable. • Links are provided for any “Bond” or “Life” policies the client may have.	

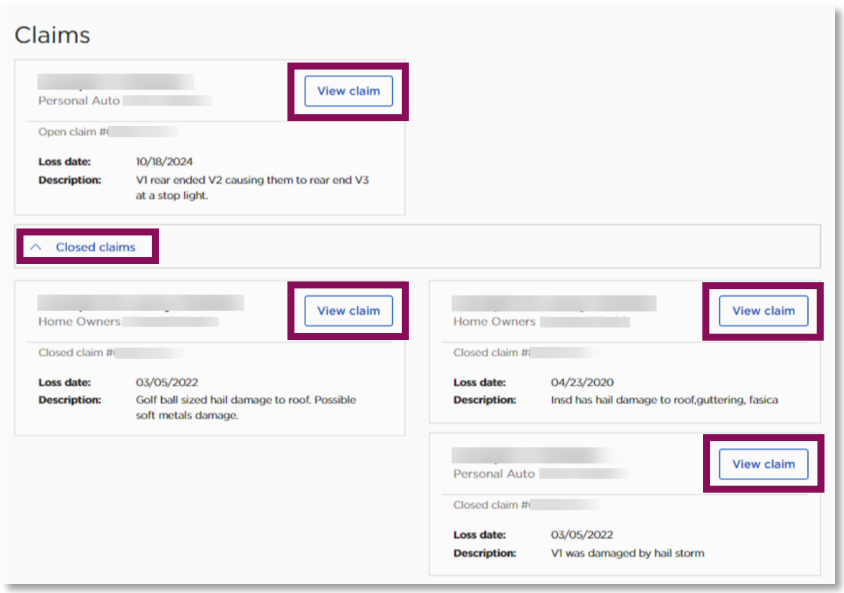
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Step 3

Action	Screen
View active “Billing accounts” by scrolling down or by selecting the “Jump To” link. Common billing actions are available via the tile such as “Make Payment” and “Update Payment Method.” Additional tasks can be accessed through the “See All Billing” link. **NOTE**: You can also select a drop-down for any “Inactive Billing Accounts” if applicable.	

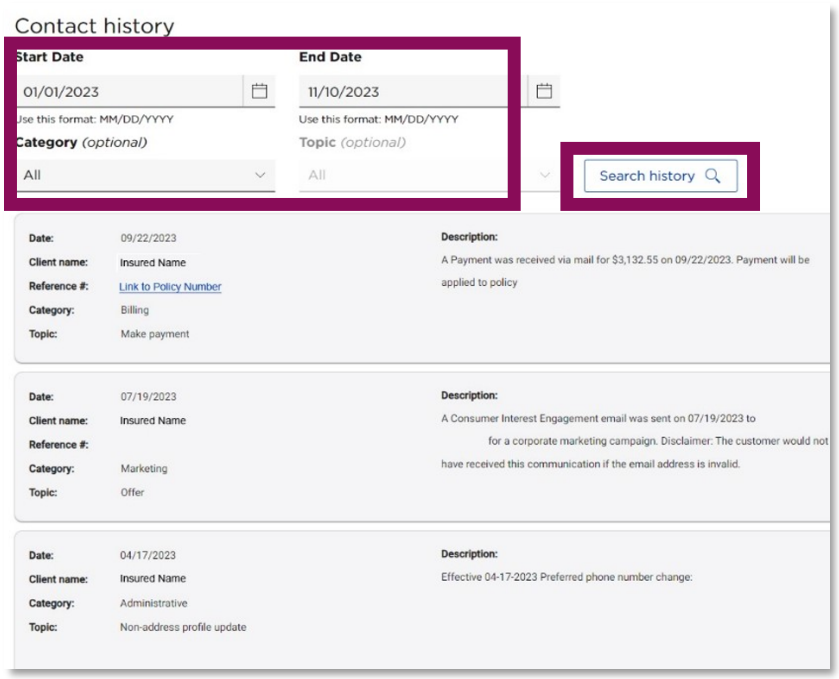
Step 4

Action	Screen
View “Claims” by scrolling down or by selecting the “Jump To” link. You will have access to both “Open” or “Closed” claims by selecting the links for details. Common information is viewable for the tile such as “Loss Date” and “Description.” Additional information can be accessed from the “View claim” button. **NOTE**: You can also select a drop-down for any closed claims if applicable.	

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Step 5

Action	Screen
The “Client Summary” screen also has a section for the most recent “Contact history” with the client. You can search and sort results by “Start Date,” End Date,” “Category,” and “Topic.” To see more Contacts, edit the date range and select “Search history.”	

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