

PolicyCenter Introduction – BA / Functional Training

This course introduces students to the business functionality of the PolicyCenter base application.

Course Materials

#	Lesson	Time	Presentation
DAY 1	INTRODUCTION		
01	Introduction to PolicyCenter	30 min	Presentation
02	The PolicyCenter User Interface	1 hr	Presentation
03	The Policy File	1 hr	Presentation
04	Policy Transaction	1 hr	Presentation
05	Accounts	1 hr	Presentation
	POLICY TRANSACTIONS		
06	Submissions 1: Quick Quotes	1 hr 30 min	Presentation
DAY 2			
07	Submissions 2: Full Applications	1 hr	Presentation
08	Renewals	1 hr	Presentation
09	Policy Changes	45 min	Presentation
10	The Cancellation Transaction Set	50 min	Presentation
11	Out-of-Sequence Transactions	45 min	Presentation
12	Merging and Splitting Accounts	25 min	Presentation
	THE PRODUCT MODEL		
13	Introduction to Product Model	30 min	Presentation
14	Products and Policy Lines	45 min	Presentation
DAY 3			
15	Coverages	45 min	Presentation
16	Coverage Terms	45 min	Presentation
17	Modifiers	30 min	Presentation

18	Question Sets	45 min	Presentation
	COSTS AND FINANCIALS		
19	Costs and Financial Transactions	45 min	Presentation
20	Premium Audits	1 hr 15 min	Presentation
	POLICY TOOLS		
21	Documents	1 hr	Presentation
22	Notes (Lesson)	15 min	Presentation
DAY 4			
22	Notes (Lab)	15 min	Presentation
23	Activities	45 min	Presentation
	MANAGEMENT AND CONFIGURATION		
24	Users and Groups	50 min	Presentation
25	Organizations	45 min	Presentation
26	Permissions	50 min	Presentation
27	Forms	50 min	Presentation
28	Validation	30 min	Presentation
29	Underwriting Authority	45 min	Presentation
	CONFIGURATION OVERVIEW		
30	PolicyCenter Configuration	30 min	Presentation

Further Study

#	Lesson	Time	Presentation
01	Rating Overrides	30 min	Presentation