UPLOADING CERTIFICATES OF INSURANCE AND OTHER FILES

The steps below must be followed in order to upload a Certificate of Insurance or any other files into the Docutrax.

Step 1: Click the Link at the bottom of the email you receive that says "Submit a New Certificate of Insurance"

Please forward this email to your insurance broker.	Using the link listed below, your insurance agent will be able
SUBMIT A NEW CERTIFICATE OF INSURANCE	
CLICK HERE TO LEARN HOW TO UPLOAD A FIL	E

Step 2: Your browser should open and the page below appears.

DOCUTRAX	DOCUTRAX SAMPLE	
	TopTier Reports Group Tracked RiskProfiles Review Brokers Ca	rriers Admin Logout
Sample Policyholder UPLOAD DOCUMENTS		All files are scanned for virus before acceptanc
From this page you may: 1. Upload a certificate of insurance file 2. Upload any required documents 3. Upload any non-required documents	Select from the choices below. You may upload more than one document at the same Do not upload certificates of insurance in the document Any non-required document you wish to upload must be	time. t section. e given a name.
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UPLOAD A CERTIFICAT	TE OF INSURANCE	Choose File No file chosen
Status	Document Section	Choose File(s) and Upload Your Document(s)
Enter Non-Required Docum	ent Name:	Choose File No file chosen
	To serve you better, please provide the following information Sender Name: Sender Email: Sender Phone:	ation:
Release 6.0	UPLOAD	

Step 3: To upload a copy of your certificate of insurance, click on the icon called "Choose File" in the red box below. A certificate of insurance is considered a liability or property certificate of insurance.

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Step 4: To upload a copy of any other file that is not considered a certificate of insurance, click the icon called "Choose File" in the red box below.

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Step 5: Once you have added all your files, Click the "Upload" link in red below.

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Sample P UPLOAD	Policyholder DOCUMENTS						All files are scanned for virus before acceptance	
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Step 6: You will receive a thank you note confirming that your files have been uploaded. If you want to see the file you uploaded, click on the file name in the blue box, below. If you forgot to attach a file you could click, "Add more documents for (Policyholder name)" in the green box below.

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