

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 FILE](#)

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

DOCUTRAX

DOCUTRAX
SAMPLE

TopTier Reports Group Tracked RiskProfiles [Review](#) Brokers Carriers Admin Logout

Sample Policyholder
UPLOAD DOCUMENTS

All files are scanned for virus before acceptance

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 time.

Do not upload certificates of insurance in the document section.

Any non-required document you wish to upload must be given a name.

Status	Certificate of Insurance Section	Choose File and Upload Your COI
	UPLOAD A CERTIFICATE OF INSURANCE	<input type="button" value="Choose File"/> No file chosen

Status	Document Section	Choose File(s) and Upload Your Document(s)
	Enter Non-Required Document Name: <input type="text"/>	<input type="button" value="Choose File"/> No file chosen

To serve you better, please provide the following information:

Sender Name:

Sender Email:

Sender Phone:

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.

Sample Policyholder
UPLOAD DOCUMENTS

All files are scanned for virus before acceptance

Click here

- 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 time.
Do not upload certificates of insurance in the document section.
Any non-required document you wish to upload must be given a name.

Status	Certificate of Insurance Section	Choose File and Upload Your COI
UPLOAD A CERTIFICATE OF INSURANCE		Choose File No file chosen

Status	Document Section	Choose File(s) and Upload Your Document(s)
Enter Non-Required Document Name:	<input type="text"/>	Choose File No file chosen

To serve you better, please provide the following information:

Sender Name:

Sender Email:

Sender Phone:

UPLOAD

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.

Sample Policyholder
UPLOAD DOCUMENTS

All files are scanned for virus before acceptance

Click here

- 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 time.
Do not upload certificates of insurance in the document section.
Any non-required document you wish to upload must be given a name.

Status	Certificate of Insurance Section	Choose File and Upload Your COI
UPLOAD A CERTIFICATE OF INSURANCE		Choose File No file chosen

Status	Document Section	Choose File(s) and Upload Your Document(s)
Enter Non-Required Document Name:	<input type="text"/>	Choose File No file chosen

To serve you better, please provide the following information:

Sender Name:

Sender Email:

Sender Phone:

UPLOAD

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

Sample Policyholder
UPLOAD DOCUMENTS

All files are scanned for virus before acceptance

- 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 time.
Do not upload certificates of insurance in the document section.
Any non-required document you wish to upload must be given a name.

Status	Certificate of Insurance Section	Choose File and Upload Your COI
UPLOAD A CERTIFICATE OF INSURANCE		<input type="button" value="Choose File"/> No file chosen
Status	Document Section	Choose File(s) and Upload Your Document(s)
Enter Non-Required Document Name: <input type="text"/>		<input type="button" value="Choose File"/> No file chosen
To serve you better, please provide the following information:		
Sender Name:	<input type="text"/>	Click here
Sender Email:	<input type="text"/>	
Sender Phone:	<input type="text"/>	
		UPLOAD

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.

THANK YOU

Thank you for your submission on behalf of your insured Sample Policyholder.

The documents you have provided are being processed for compliance with the requirements established for Sample Policyholder.

Endorsement

20200319_1506.png

We will contact Sample Policyholder should there be any questions regarding coverage.

If you have more documents to upload, click the link below:

Add more documents for Sample Policyholder

Click here to see the file you uploaded

Click here to upload more COIs or Documents