CLIENT WEBSITE UPLOAD A DOC USER GUIDE

My.EquiTrust.com

EquiTrust contract and policy owners have the ability to utilize Upload A Doc as an option to submit contract or policy documents and requests to EquiTrust. Documents are instantly received at EquiTrust — no mail time. With this feature, you can have confidence that your documents have been submitted securely.

- **Acceptable formats:** TIF, PDF, JPG, DOC

- **Acceptable document size:** up to 30MB

- EquiTrust does not accept electronically signed requests.

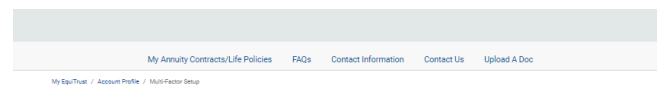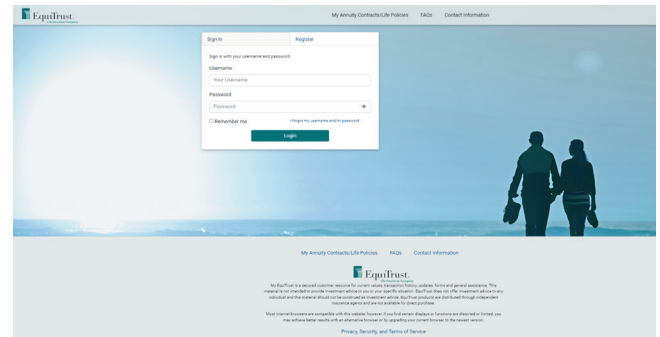- Photo images are not accepted. Submitted forms must be scanned.

Let's Get Started

- Login to your My.EquiTrust.com account.

- A link for Upload A Doc will appear in the upper tool bar of the Home Page

Website Authentication Requirements

Upload A Doc requires Multi-Factor Authentication (MFA) for enhanced security.

- If your MFA preferences are not yet established, you will be directed to your Account Profile.

- If your MFA preferences are already set up, your identity will be verified through the normal MFA process.

- After your MFA preference is setup, you are now ready to use Upload A Doc.

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How to Use Upload A Doc

1 From the Home Page, click Upload A Doc.

The Upload A Doc page features two tabs:

• Document Upload — To submit a new document to EquiTrust

• View Upload History — An overview of previously submitted documents, including:

  ◦ Upload Date

  ◦ Confirmation Number

  ◦ Submitted By

  ◦ File Name(s)

Document upload

2 At the Document Upload tab, enter your contract or policy number.

Add Files

3 Click Add Files to retrieve a document or form from your computer files.

4 Select the appropriate document from your files, then click Open.

5 To upload additional documents, click Add More Files.

• File names of uploaded documents will appear on the screen.
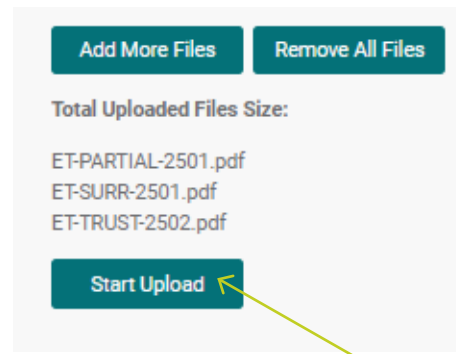
EquiTrust®

Removing Files

6 Click the trashcan icon located next to a file name and file size to delete an individual file.

7 To delete all documents at the same time, click the Remove All Files button.
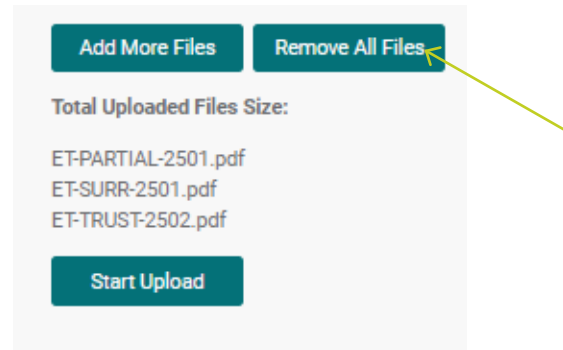
Submit

8 When ready to submit, click Start Upload.

• Upon successful upload, a message will appear: "Success! The file upload is complete."

Check Your Upload History

To view the details of the submitted document(s), go to the View Upload History.

That's All There Is To It!

When finished, you may navigate around My.EquiTrust.com or log out.

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