Upload A Doc User Guide

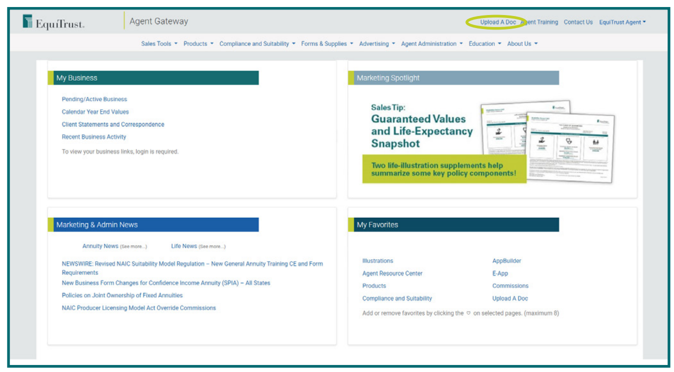
EquiTrust Agent Gateway Website

Upload A Doc is an alternative means to submit new business and supporting documents to EquiTrust. Your documents are instantly received at EquiTrust – no mail time. And, confidential documents arrive safely. This service is particularly attractive for submitting corrected documents – to keep your business moving!

Acceptable formats: TIF, PDF, JPG, DOC, XLS, PPT
Acceptable document size: 30MB

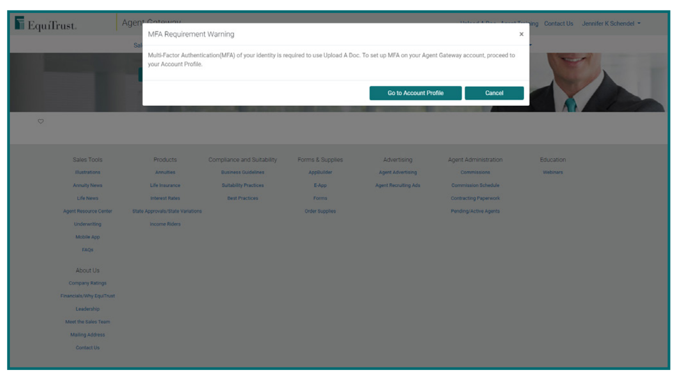
Let's Get Started

- Login to your Agent Gateway account.
- Upon login, a link for Upload A Doc will appear in the upper tool bar of the Home Page.



Website Authentication Requirements

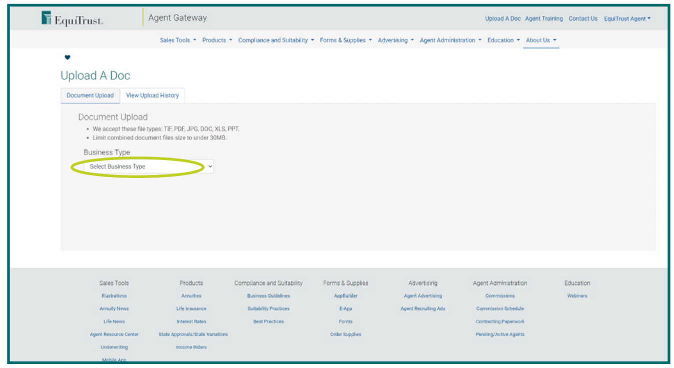
- Upload A Doc requires Multi-Factor Authentication for enhanced security.
- If your MFA preferences are not yet established, you will be directed to your Account Profile to do so.
- If your MFA preferences are already set up, your identity will be verified through the normal MFA process.
- After MFA preference setup and authentication to your identity, you are now ready to use Upload A Doc.



1. How to Use Upload A Doc

From the Home Page, click Upload A Doc.

- The Upload A Doc page features two tabs:
  - Document Upload – to begin preparation to submit a new document to EquiTrust
  - View Upload History – an overview of previously submitted documents, including:
    - Upload Date
    - Confirmation Number
    - New/Active Business
    - Submitted By (may indicate a Delegate Account holder established by you)
    - File Name
    - Notes

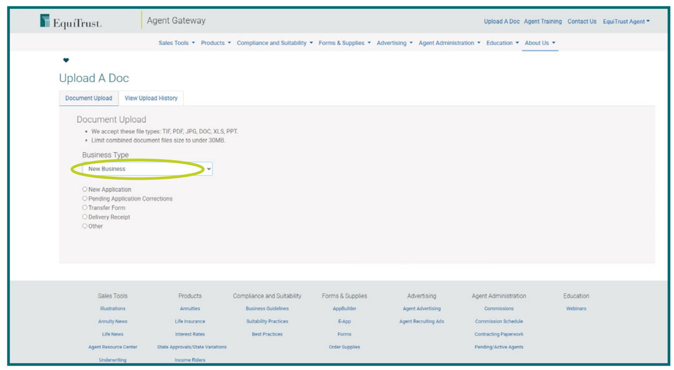


2. Document Upload*

At the Document Upload tab, indicate in the dropdown the Business Type to be submitted: New or Active Business.

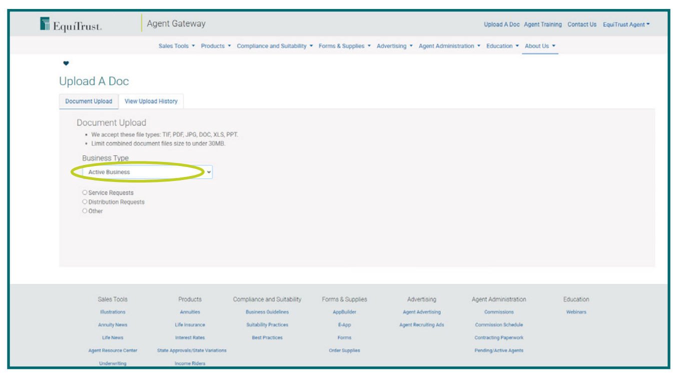
New Business, choose among:

- New Application
- Pending Application Corrections
- Transfer Form
- Delivery Receipt
- Other



Active Business, choose among:

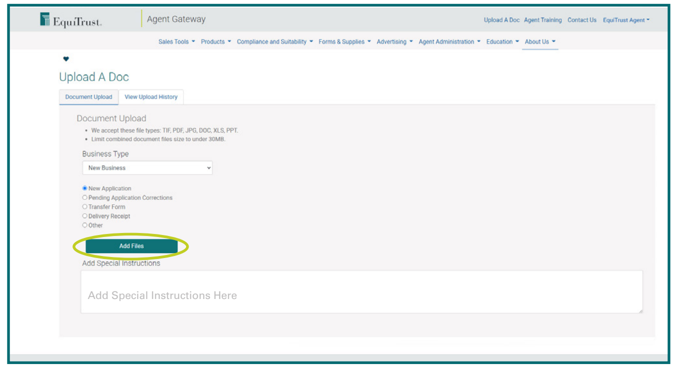
- Service Requests
- Distribution Requests
- Other



* For every business type you're submitting except new applications you'll be able to add the client's contract or policy number.

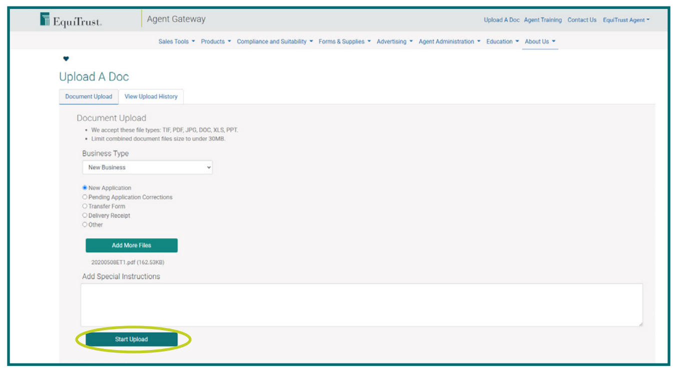
3. Add Files

- Click <u>Add Files</u> to retrieve the document from your files.
- Select the appropriate document from your files, then Open.
- To upload additional documents, click <u>Add More Files</u>.
- File names of uploaded documents will appear on screen.
- You can add additional detail or instructions in the <u>Add Special Instructions</u> field.



4. Submit

- When ready to submit, click <u>Start Upload</u>.
- Upon successful upload, a message should appear: Success! The file upload is complete.



Uploads for Another Client

If you have additional documents for another client, click Add Documents for Another Client.

Check Your Upload History

To view the details of the sent document, go to the View Upload History.

That's All There Is To It!

When finished, you may navigate around the Agent Gateway Website or logout.

Questions?

Call EquiTrust Sales Support at 866-598-3694
Or email Sales.Support@EquiTrust.com