Uploading and Linking Documents

What	Uploading and linking documents based on task
Who	Personal and Commercial Lines agents
When	The process for uploading documents in PolicyCenter® differs depending on the scenario and, for new submissions, the line of business:

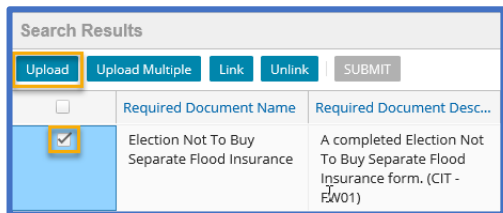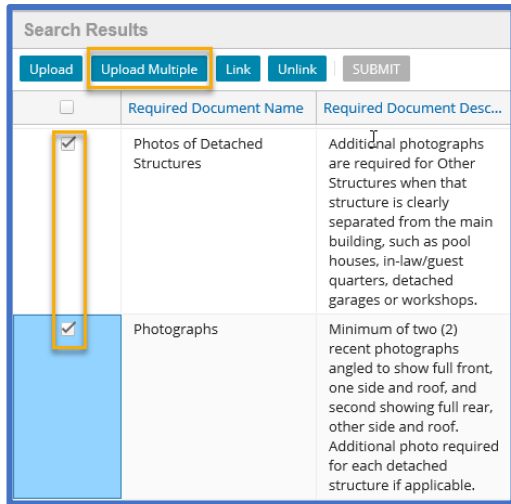| Scenario	Procedure	See Page
Creating new business	**Uploading Required Documents**	**2**
	Linking Documents	7
Creating a policy change, activity, cancellation, or responding to an activity from Underwriting	**Uploading Documents to an Activity**	**8**
	Linking Uploaded Documents to an Activity	**8**
Additional resources are needed	**Access Agent *Frequently Asked Questions***	**11**

Uploading and Linking Documents, Continued

New Business: Uploading Required Documents

As you create a new submission, the *Required Documents* screen displays a dynamic list of documents you must upload. Use the procedure below to upload documents during a new-business submission.
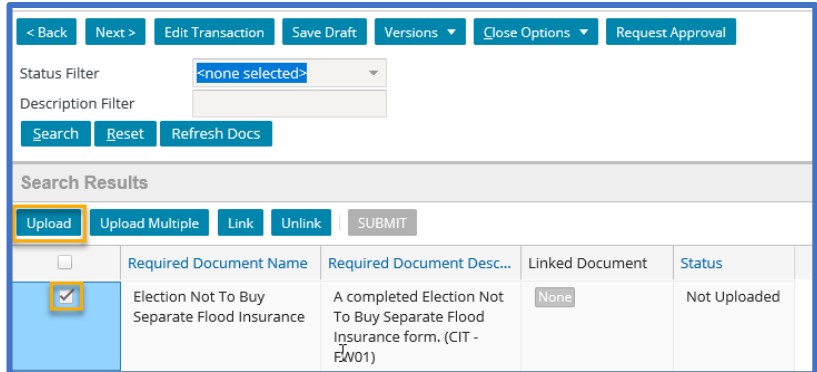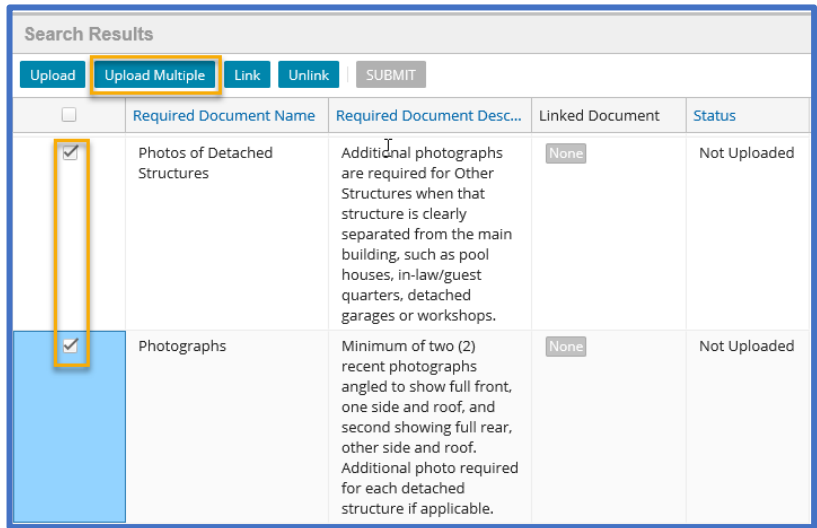
Note: Personal lines submissions will have the option of using single or multiple-document upload procedures. Commercial lines policies will only have the option for single-document submission.

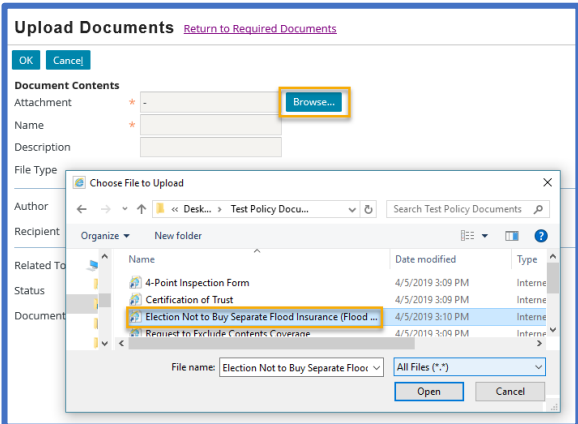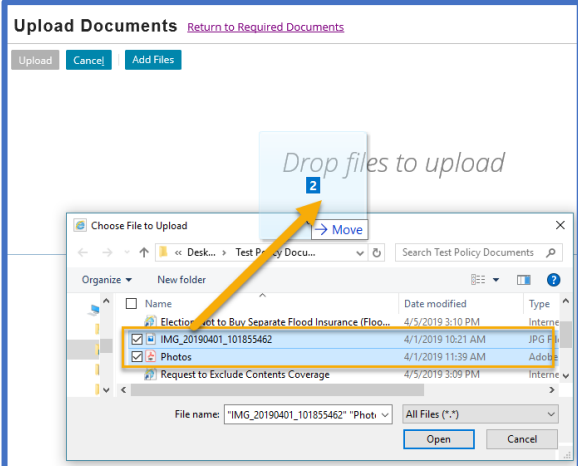| Step	Action
1	Single or multiple documents can be uploaded in the same step. On the *Required Documents* screen, select the check box next to the applicable document(s) in the *Required Document Description* section: **Single-Document Upload:** **Multiple-Document Upload:** **Result:** The *Upload* or *Upload Multiple* button becomes active.

Uploading and Linking Documents, Continued

New Business: Uploading Required Documents, continued	Step	Action
	2	For a single-document upload, select **Upload**: For multiple-document upload, select **Upload Multiple**: **Result:** The *Upload Documents* screen displays.

Uploading and Linking Documents, Continued
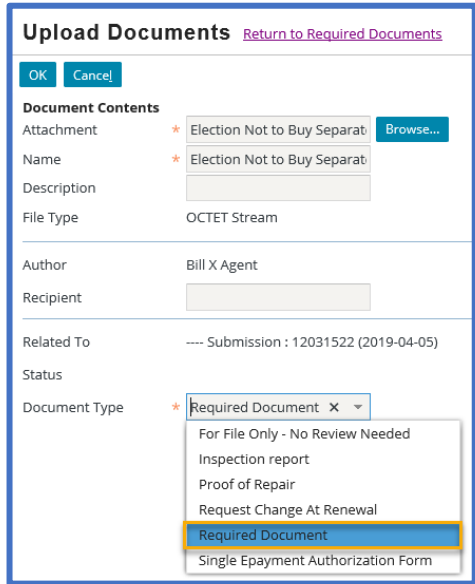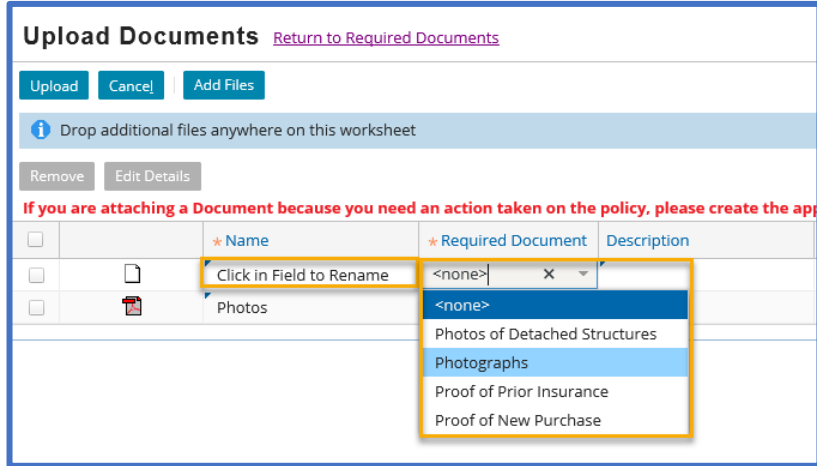
	Step	Action
New Business: Uploading Required Documents, continued	3	For a single-document upload: Select **Browse** to navigate to the desired document and double-click to select it: **Result:** Once the document is selected, its file name appears in the *Name* field. It should describe the document; rename it if necessary. For multiple-document uploads: Select **Add Files,** or select the files from your computer, then drag and drop files to the **Upload** field:

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Uploading and Linking Documents, Continued

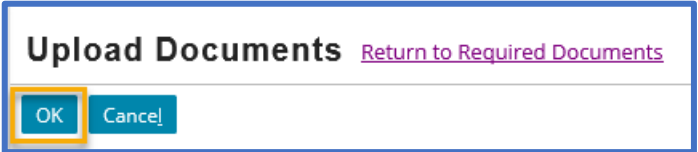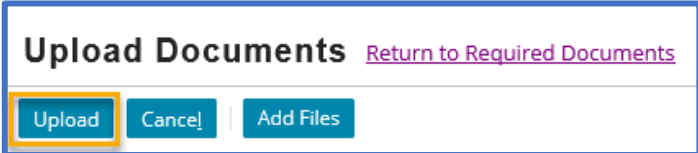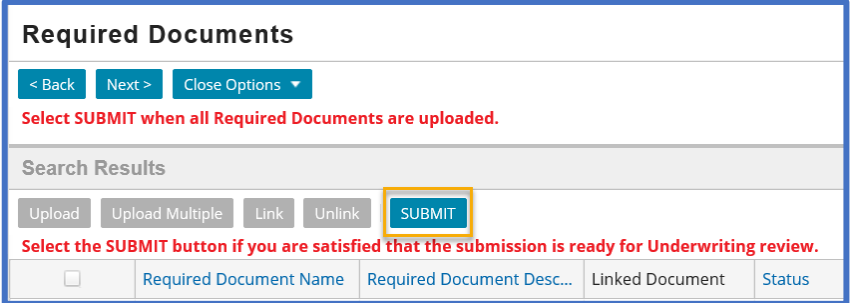|	Step	Action
New Business: Uploading Required Documents, continued	4	For a single-file upload: Select **Required Document** as the *Document Type*: For multiple-file uploads: Click in the *Name* field to rename file (if needed), then click in the *Required Document* field to identify the document.

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Uploading and Linking Documents, Continued
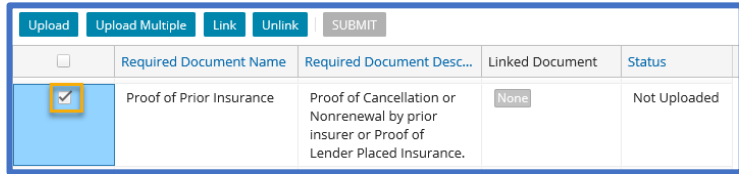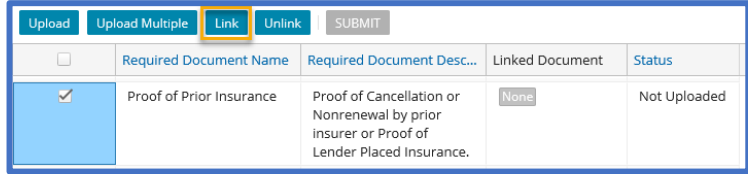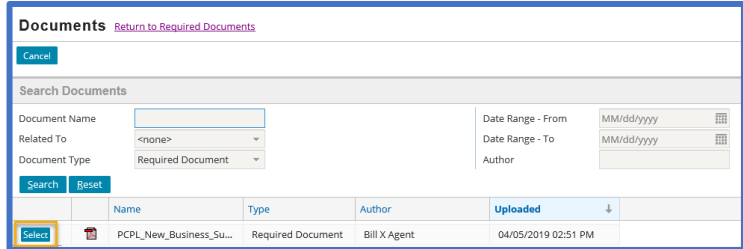
	Step	Action
New Business: Uploading Required Documents, continued	5	Click **OK** or **Upload** to upload the document(s). **Single-Document Upload:** Upload Documents Return to Required Documents OK Cancel **Multiple-Document Upload:** Upload Documents Return to Required Documents Upload Cancel | Add Files **Result:** The document status has changed to *Uploaded.*
	6	If needed, repeat Steps 1-5 until all required documents display with an *Uploaded* status. Select **SUBMIT** when done: **Required Documents** < Back Next > Close Options ▼ Select SUBMIT when all Required Documents are uploaded. **Search Results** Upload Upload Multiple Link Unlink SUBMIT Select the SUBMIT button if you are satisfied that the submission is ready for Underwriting review. ☐ Required Document Name Required Document Desc... Linked Document Status *Note*: A submission will **not** be sent to Underwriting for approval until you upload *all* of the required documents and you select *SUBMIT*.

Uploading and Linking Documents, Continued

New Business: Linking Documents

An uploaded document can be used more than once by selecting the *Link* option. For example, if one document includes burglar and fire alarm information, it can be used for burglar and fire alarm documentation. Use the procedure below to link an uploaded document to more than one required document.

Step	Action
1	On the *Required Documents* screen, select the check box next to the item that needs linking to an uploaded document: **Result:** The *Link* button becomes active.
2	Select **Link**: **Result:** The list of uploaded documents displays.
3	Click **Select** next to the appropriate document: **Result:** The *Required Documents* screen displays, and the name of the document just selected appears in the *Linked Document* column.

Uploading and Linking Documents, Continued

Uploading Documents for a Policy Change or Responding to an Activity from Underwriting

Policy changes can be created by an agent or Underwriting staff.

PolicyCenter will send a *Notice of Policy Change* activity to the agent of record when there is a change to a policy during the underwriting process.

For example, when an Underwriter removes mitigation credits, PolicyCenter will send you a *Notice of Policy Change* activity. In order to place mitigation credits back on the policy, you must complete a policy change and any documents associated with that change will be listed in the *Required Documents* screen.

Use the procedure below to upload document(s) for an agent-created policy change or in response to a *Notice of Policy Change* activity:

Step	Action
1	Access the policy, complete any necessary policy changes and in most instances, request approval.
2	Select **Required Documents** from the sidebar.
3	Follow the outlined in the *New Business: Uploading Required Documents* section of this job aid.
4	Click **SUBMIT** to send the response to Underwriting and/or complete the policy change.

Linking an Uploaded Document to an Activity

Examples of agent-initiated activities include requests for:

- Reinstatement
- Change at renewal
- Review Sinkhole Loss coverage
- Change a payment plan
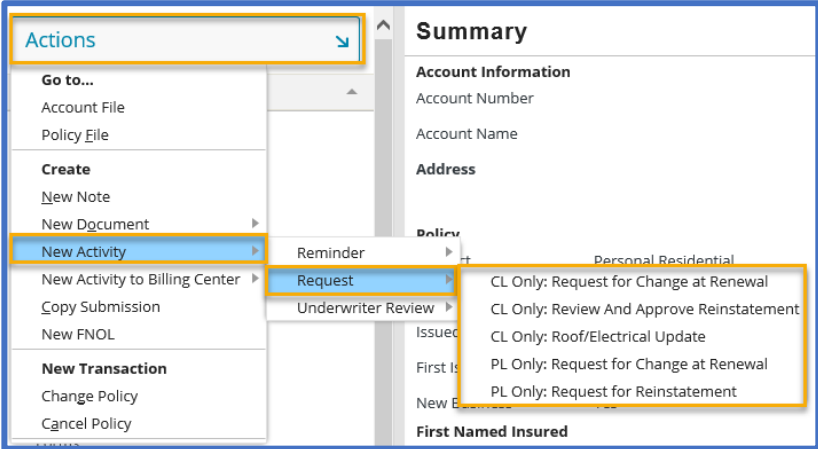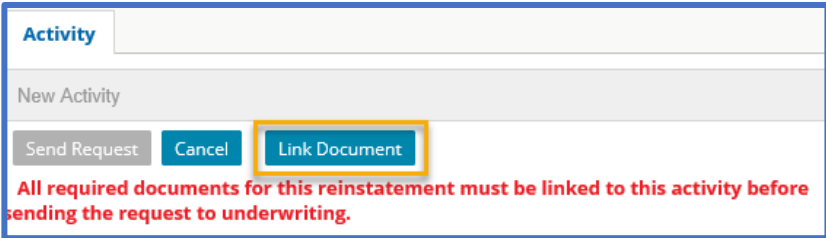- Add a new mortgage company

First, upload the document in order to link to it.
(Hint: **Actions > New Document > Upload Documents**)

Uploading and Linking Documents, Continued
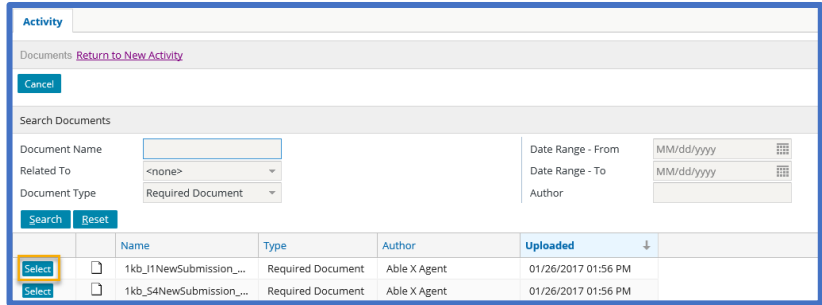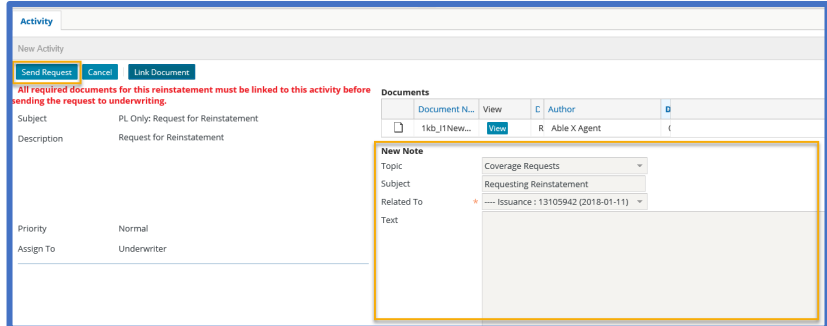
Linking an Uploaded Document to an Activity, continued

Once the document has been uploaded, use the procedure below to link the uploaded document to an activity.

Step	Action
1	Access the policy, and then select **Actions** > **New Activity** > **Request**, then select the appropriate option. **Result:** The *New Activity* panel appears.
2	Select **Link Document** to attach a document to this activity. **Result***:* A list of existing documents associated with the policy will display.

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Uploading and Linking Documents, Continued

	Step	Action
Linking an Uploaded Document to an Activity, continued	3	Click **Select** next to the appropriate document: **Result:** The *Activity* workspace will display the name of the document that was linked.
	4	Complete any applicable notes in the *New Notes* section, then select **Send Request.**

Uploading and Linking Documents, Continued

Additional Resources

For more information, see the following FAQs Answer IDs:

- Training module: *Policy Change:* Type *2241* into the search box
- Training module: *New Business: Submission through Issuance:* Type *2235* into the search box
- *How do you link required documents?* Type *2289* into the search box
- *What document types can be uploaded in PolicyCenter?* Type *2336* into the search box
- *What is the file size limit for uploading documents in PolicyCenter?* Type *2377* into the search box

Access FAQs by:

- Clicking on the **Knowledge Base** link at the top right corner of every screen in PolicyCenter.
- Selecting **Search Frequently Asked Questions** from the *Agents* website's top menu.

End Procedure