

# Upload Insurance Documents in Organization Profile



# Upload Insurance Document

Step 1: Click **My Organization**

**Grants Portal** Crocker, Betty

Dashboard

**My Organization** Bananatown (8790)

**My Organization Profile** Bananatown (8790)

Download

Organization Profile

Organization Personnel

Applicant Event Profiles

Exploratory Calls

Recovery Scoping Meetings

Projects

Damages

Work Order Requests

Work Orders

My Tasks

Calendar

Utilities

Resources

Intelligence

General Information

STATE/TERRITORY	IS ACTIVE?	Yes
FEDERAL AGENCY	FEMA PA CODE	8790
DUNS NUMBER	DUNS NUMBER	987654321

Personnel > Manage

Locations > Manage

Counties with Facility >

Insurance Profile > Upload Insurance Documents ? Help

Applicant Event Profiles >

Step 2: Click **Organization Profile**

Step 3: Click **Upload Insurance Document**

# Upload Insurance Document

Grants Portal

Dashboard

My Organization  
Banatown (8790)

My Orga  
Banatown (8790)

Organization Profile

Organization Personnel

General Informati

Documents Pending Upload

To begin uploading a document, either drag and drop a file or multiple files into the area above or click the area above to upload files manually.

Note: You may not upload the document to the Insurance Profile that matches an existing document with same document area.

UPLOAD PENDING DOCUMENTS CANCEL

Click and drag document or click to add file

# Select Insurance Document – Pop-Up Box


**Step 1: Select the document to upload**

Name	Date modified	Type
Glenville PDMG009 damage inspection Hourly ...	11/3/2017 8:44 AM	Micro
Glenville PDMG009 Debris Removal Contract	11/3/2017 11:06 AM	Micro
Glenville PDMG009 Dell Inc. Contract	11/3/2017 3:17 PM	Micro
Glenville PDMG009 Fringe Benefits	11/3/2017 8:42 AM	Micro
Glenville PDMG009 Hurricane work Log	11/3/2017 8:43 AM	Micro
<b>Glenville PDMG009 Insurance Doc</b>	10/30/2017 7:44 AM	Micro
Glenville PDMG009 Mutual Aid Agreement	11/3/2017 11:07 AM	Micro
Glenville PDMG009 PayPolicy	11/3/2017 8:41 AM	Micro
Glenville PDMG009 Roadway Maint Records	11/3/2017 4:56 PM	Micro
Glenville PDMG009 Work Orders	11/3/2017 8:41 AM	Micro

**Step 2: Click Open**

# Add Document Description & Category Type

The screenshot shows the 'Upload Insurance Documents' modal window in the Grants Portal. The modal is titled 'Upload Insurance Documents' and has a close button (X) in the top right corner. Below the title is a dashed box containing a blue upload icon and the text 'Drag and drop files here, or click here to select files.' Below this is a section titled 'Documents Pending Upload' with a search bar. A table lists the pending documents:

	Filename	Description	Size	Category
 <a href="#">EDIT</a> <a href="#">REMOVE</a>	Insurance policy.docx		11.4 KB	

Below the table, it says 'Showing 1 to 1 of 1 entries' with 'Previous', '1', and 'Next' navigation buttons. At the bottom of the modal are two buttons: 'UPLOAD PENDING DOCUMENTS' (green) and 'CANCEL' (white). A red callout box with the text 'Click Edit' points to the 'EDIT' button in the table.

# Add Document Description & Category Type

The screenshot shows the 'Process Document' form in the Grants Portal. The form includes a 'CAUTION' message, a 'Filename' field with 'Insurance policy.docx', a 'Description' field, and a 'Category' dropdown menu. The dropdown menu is open, showing options like 'General Insurance Documents', 'Insurance Certificate', 'Insurance Policy', 'Insurance Settlement', 'Insurance Worksheet', and 'Proof of Insurance'. The 'Insurance Policy' option is highlighted. Three callouts provide instructions: 'Step 1: Write description of document' points to the Description field; 'Step 2: Click the Category box' points to the Category dropdown; and 'Step 3: Click to select document category type' points to the 'Insurance Policy' option in the dropdown.

Step 1: Write description of document

Step 2: Click the Category box

Step 3: Click to select document category type

# Add Insurance Documents

Grants Portal

Upload Insurance Documents

Drag and drop files here, or click here to select files.

Documents Pending Upload

	Filename	Description	Size	Category
✓ EDIT REMOVE	Insurance policy.docx	General Insurance Policy	11.4 KB	Insurance Policy

Showing 1 to 1 of 1 entries

UPLOAD PENDING DOCUMENTS CANCEL

Repeat uploading if additional documents

Click Upload Pending Document