Upload Insurance Documents in Organization Profile

Upload Insurance Document

Step 1: Click **My Organization**

Step 2: Click **Organization Profile**

Step 3: Click **Upload Insurance Document**

Upload Insurance Document

Select Insurance Document – Pop-Up Box

Step 1: Select the document to upload

Step 2: Click **Open**

Add Document Description & Category Type

Click Edit

Add Document Description & Category Type

Step 1: Write description of document

Step 2: Click the **Category** box

Step 3: Click to select document category type

Process Document

⚠ CAUTION: Document will be uploaded to the **Insurance Profile**.

Filename *
Insurance policy.docx

Description

Category *
Select...

General Insurance Documents
Insurance Certificate
Insurance Policy
Insurance Settlement
Insurance Worksheet
Proof of Insurance

Add Insurance Documents

Repeat uploading if additional documents

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

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⬆ UPLOAD PENDING DOCUMENTS ⊘ CANCEL

Click **Upload Pending Document**