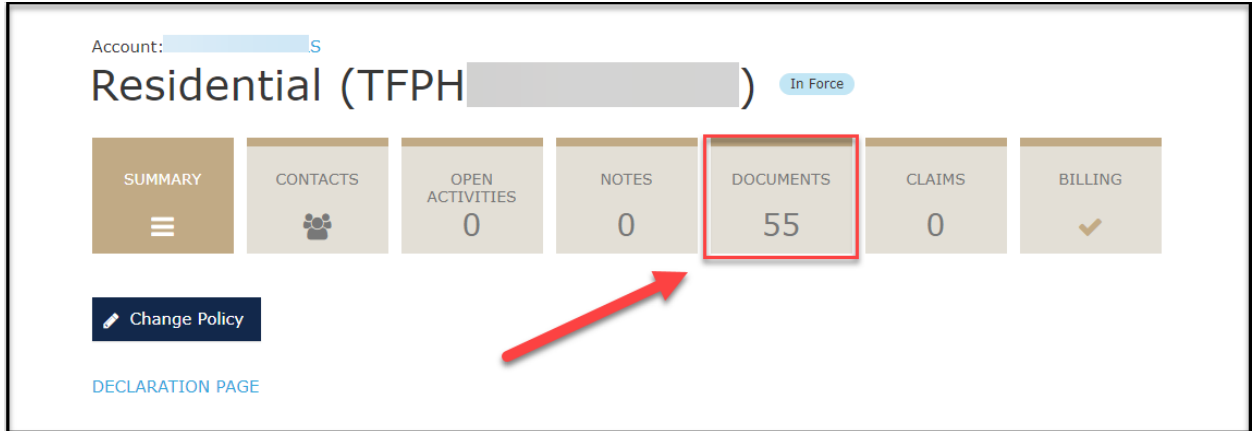


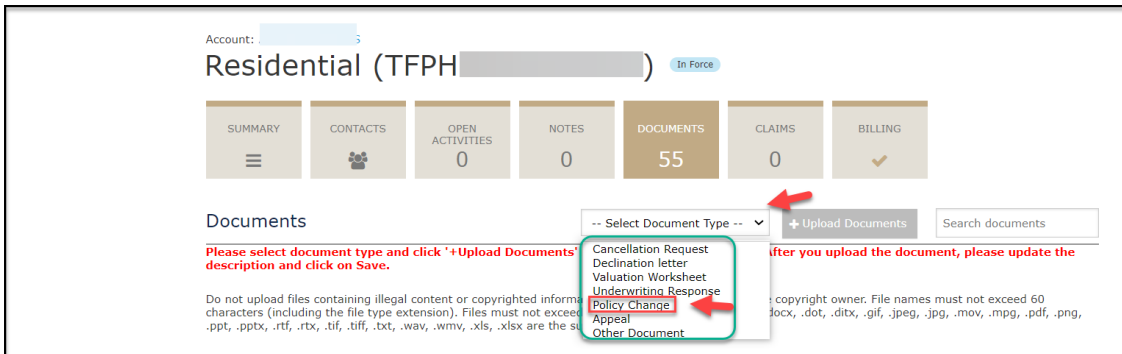
# TFPA: How to Upload Documents to a Policy

This job aid demonstrates the steps needed to upload documents.

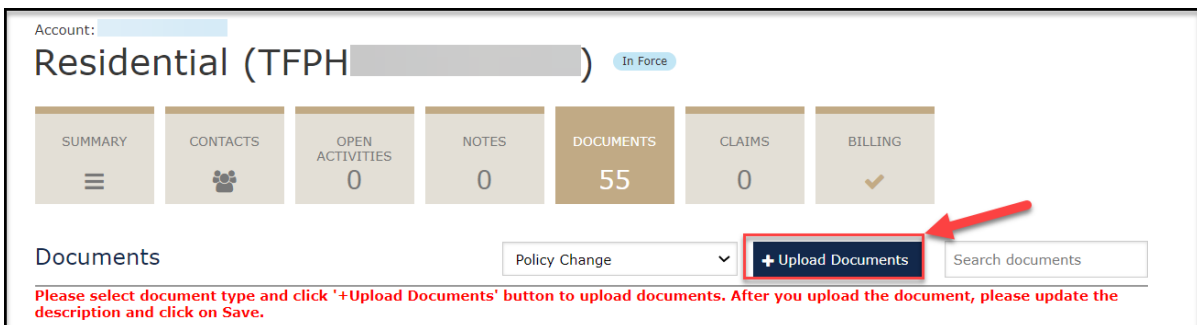
1. Open the TFPA policy you would like to work with and then select “Documents.”



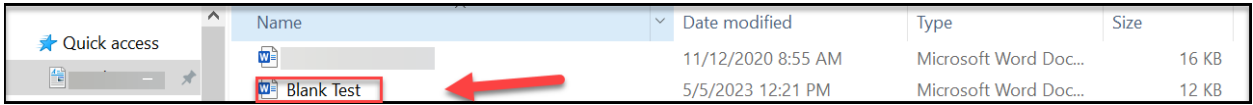
2. Next select the document type you want to upload to the policy from the drop-down menu. In this example, we are choosing to upload a “Policy Change” document to initiate a policy change.



3. Next, click on “Upload Documents.”

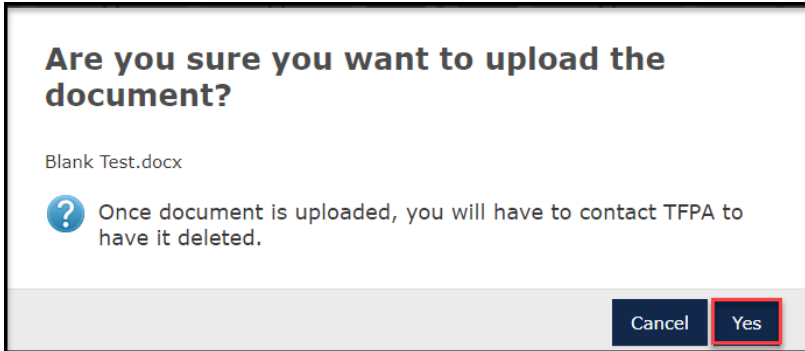


4. The system will take you to your documents screen to select the document you would like to upload. Double click on the document's name.



Name	Date modified	Type	Size
[Redacted]	11/12/2020 8:55 AM	Microsoft Word Doc...	16 KB
Blank Test	5/5/2023 12:21 PM	Microsoft Word Doc...	12 KB

5. The system will warn you that once you upload the document only a TFPA underwriter can delete it. When you are ready to upload the document select "Yes."



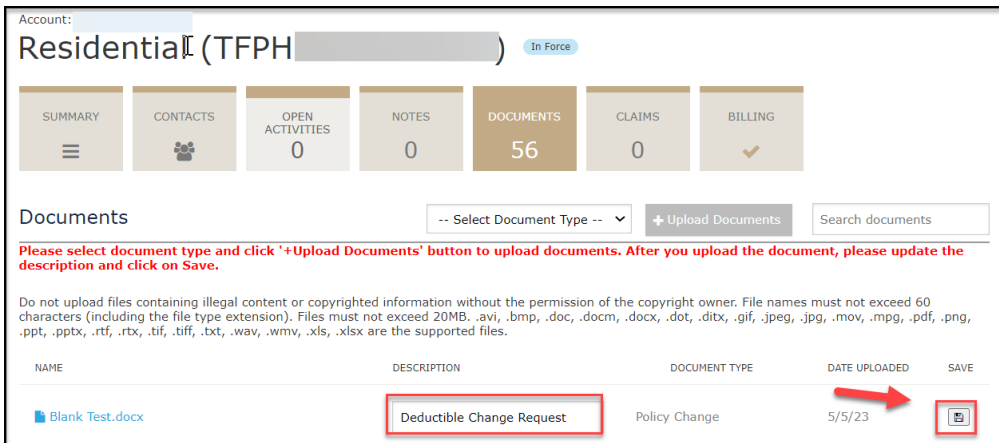
**Are you sure you want to upload the document?**

Blank Test.docx

Once document is uploaded, you will have to contact TFPA to have it deleted.

Cancel Yes

6. On the next screen you may enter the document description where indicated. Next, click on the floppy disk icon to save the document description.



Account: Residential (TFPH) In Force

SUMMARY CONTACTS OPEN ACTIVITIES NOTES DOCUMENTS CLAIMS BILLING

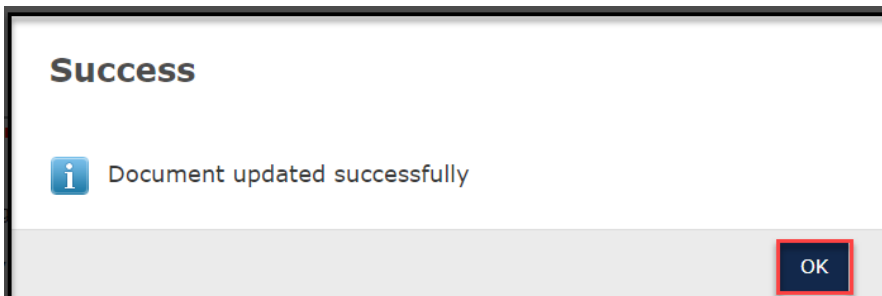
Documents -- Select Document Type -- + Upload Documents Search documents

Please select document type and click '+Upload Documents' button to upload documents. After you upload the document, please update the description and click on Save.

Do not upload files containing illegal content or copyrighted information without the permission of the copyright owner. File names must not exceed 60 characters (including the file type extension). Files must not exceed 20MB. .avi, .bmp, .doc, .docm, .docx, .dot, .dtx, .gif, .jpeg, .jpg, .mov, .mpg, .pdf, .png, .ppt, .pptx, .rtf, .rtx, .tif, .tiff, .txt, .wav, .wmv, .xls, .xlsx are the supported files.

NAME	DESCRIPTION	DOCUMENT TYPE	DATE UPLOADED	SAVE
Blank Test.docx	Deductible Change Request	Policy Change	5/5/23	[Floppy Disk Icon]

7. Your document has been uploaded. Select "Ok" to exit.



**Success**

Document updated successfully

OK

