

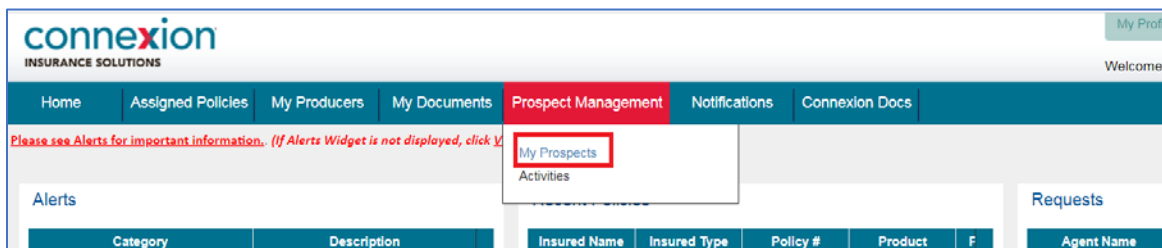
MyBusiness Process Guide: Document Upload

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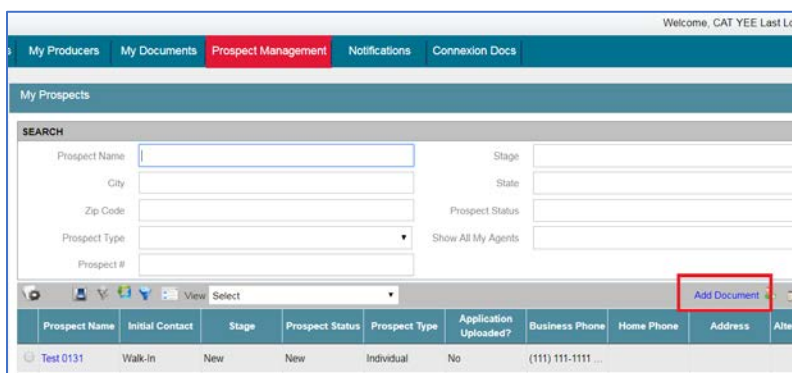
Document Upload 3

Document Upload

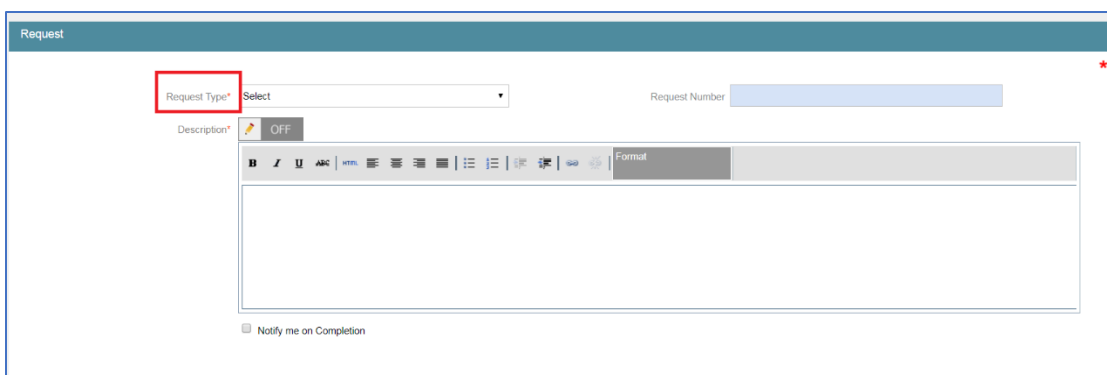
1. Log into MyBusiness
2. At the top of the page, hover over the 'Prospect Management' tab.
3. Select 'My Prospects'



4. In the new screen, click 'Add Document'



5. In the new page, Request, click the 'Request Type' drop down menu.



- From the 'Request Type' drop down menu, select the 'Line of Business' applicable to your document upload.

The screenshot shows a 'Request Type*' dropdown menu. The menu is open, displaying a list of options. The 'Line of Business' options are highlighted with a red box:

- Select
- Address Change
- Contact Change
- Add Affiliation
- Add Appointment
- Application Submission - Group
- Line of Business: Group
- Line of Business: Medicare
- Line of Business: Individual
- Line of Business: Ancillary

- Depending on the selected 'Line of Business' – the form in the description box will change. Complete the highlighted fields before submission.

The screenshot shows the form for 'Line of Business: Medicare'. The 'Line of Business' dropdown is set to 'Medicare'. The 'Description*' field is highlighted with a red box, and the following fields are highlighted in yellow:

- Client First Name:
- Client Last Name :
- Carrier:
- Effective Date:
- Medicare Plan Type (MA, PDP , MedSupp):

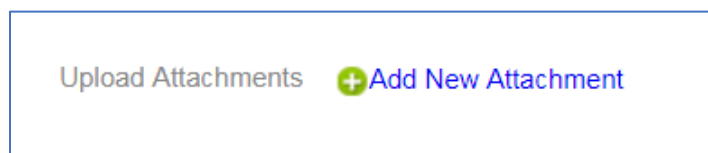
The screenshot shows the form for 'Line of Business: Group'. The 'Request Type*' dropdown is set to 'Line of Business: Group'. The 'Description*' field is highlighted with a red box, and the following fields are highlighted in yellow:

- Group Name:
- Comments :

- If you would like to be notified document was received by Connexion check the 'Notify me on Completion' checkbox.

The screenshot shows the form with the 'Request Type*' dropdown set to 'Select'. The 'Description*' field is highlighted with a red box. At the bottom of the form, the 'Notify me on Completion' checkbox is checked and highlighted with a red box.

9. Click 'Add New Attachment' to upload your document.



10. In the new window, name document with Agent First Name initial, Agent Last name and current date (JSmith.022519).

***Category and Sub Category fields are not required, leave as 'Not Applicable'.

A screenshot of a form window titled 'x' in the top right corner. A legend indicates '* = Required'. The form contains the following fields:

- Document Name***: A text input field containing 'JSmith.022519', which is highlighted with a red rectangular border.
- Category***: A dropdown menu with 'Not Applicable' selected.
- Sub Category***: A dropdown menu with 'Not Applicable' selected.
- Attach Document***: A green 'Browse' button.

 At the bottom of the form are two buttons: 'Close' (grey) and 'Save' (orange).

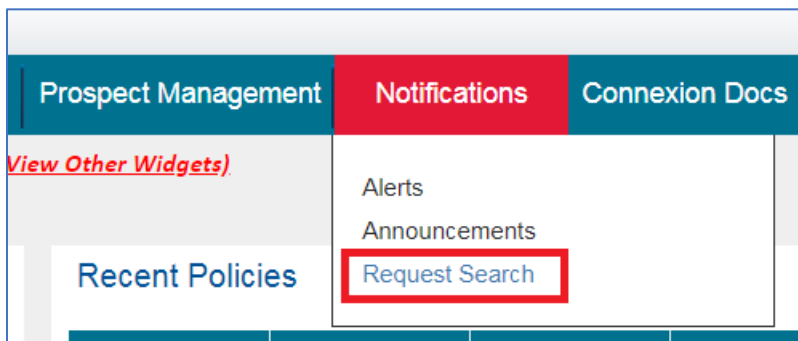
11. Click 'Browse' and select the file to upload.
*You can only upload one file at a time.
12. Once file has been selected, click 'Save' to upload document
13. Click 'Save and Close' to complete Request

A screenshot of a confirmation screen. At the top, it shows 'Group Name: Ancillary Test' and a 'Comments:' field. Below this is a checkbox labeled 'Notify me on Completion' which is checked. The screen displays the following information:

- Document Name: JSmith 022519
- Category Name:
- Uploaded Attachment: case10atc.doc

 There is a red icon and the text 'Delete This Attachment' next to the attachment name. At the bottom, there are three buttons: 'Close' (grey), 'Save' (orange), and 'Save and Close' (orange), with the 'Save and Close' button highlighted by a red rectangular border.

14. If you wish to locate the file you uploaded hover over the 'Notifications' tab and select 'Request Search'



15. In the 'Request Search' page, click 'Search'

The screenshot shows the 'Request Search' page. At the top, there is a navigation bar with tabs: 'Home', 'Assigned Policies', 'My Producers', 'My Documents', 'Prospect Management', 'Notifications' (highlighted in red), and 'Connexion Docs'. Below the navigation bar, there is a sidebar on the left with the following links: 'Notifications', 'Alerts', 'Announcements', and 'Request Search' (which is highlighted). The main content area is titled 'Request Search' and contains a search form. The form has the following fields: 'Producer Name' (text input), 'Producer Code' (text input), 'Status' (dropdown menu), and 'Show All My Agents' (checkbox). There is a 'Clear Search' button and a 'Search' button (highlighted with a red box). Below the search form, there is a table with the following columns: 'Producer Name', 'Producer Code', 'Request Type', 'Status', 'Requested Date', 'Status Date', 'Document Name', and 'File'. The table is currently empty. At the bottom right of the page, there is a link that says 'Add Request' with a green plus icon.

16. Once Connexion has viewed and downloaded the document, you will receive an email notification that your request has been 'closed'.