

INSTANT DOCUMENT UPLOAD

Through the CFG Agent Website



SUBMITTING BUSINESS THROUGH DOCUMENT UPLOAD

- Scan or take photo of documents
- Upload electronically from your phone, tablet or computer



No more fax numbers or mailing addresses to remember! Your documents are automatically routed to the right place!

DOCUMENT UPLOAD

BENEFITS

- It's fast, easy and secure
- Eliminates the need to search for a fax machine or post office when you're on the road. Submit forms directly to:
 - New Business
 - Customer Service
 - Commission Administration
 - Premium Administration



HOW IT WORKS

CREATE ELECTRONIC FILES

Use scanner or camera to create PDF, JPG, TIFF or PNG files.



If using camera, use portrait orientation and capture the full page, including the form number.



HOW IT WORKS

UPLOAD ELECTRONIC FILES

- Log in to the CFG Partners Website
- Select Resources / Document Upload



HOW IT WORKS

UPLOAD ELECTRONIC FILES

Document Upload

This form utilizes Internet encryption technology to ensure safe and secure transmission of your documents.
Complete the form and click "Upload" button. The yellow highlighted items are required.

Sender Details

Sender: Columbian Representative

Sender Email:

Sender Phone:

Please enter information related to this transmission.

In accordance with my Columbian agent contract and applicable regulations, I understand that I am responsible to safeguard personal customer information stored on my computer or mobile devices. I agree to immediately remove all images containing nonpublic personal information from my mobile device after the upload to CFG is completed to avoid inadvertent disclosure of such information.

Send To: **New Business** ▼

Product: **-- Select --** ▼

Insured First Name:

Insured Last Name:

Is this a *new application*? **Yes** ▼

Remarks:

Select an option from the "Send To" drop down menu. The information you enter here will create a cover sheet and route your business to the appropriate team.

Please select no more than 10 files related to this transmission. Maximum file size is 10 Mb and maximum total upload size is 30 Mb. Allowed formats are TIFF, PDF, JPG, PNG. Do not combine multiple insureds or policies in one transmission. An image of your uploaded files will be viewable for 14 days after the upload date. A summary of your upload will be available in your Upload History for 90 days.

Attach files to upload

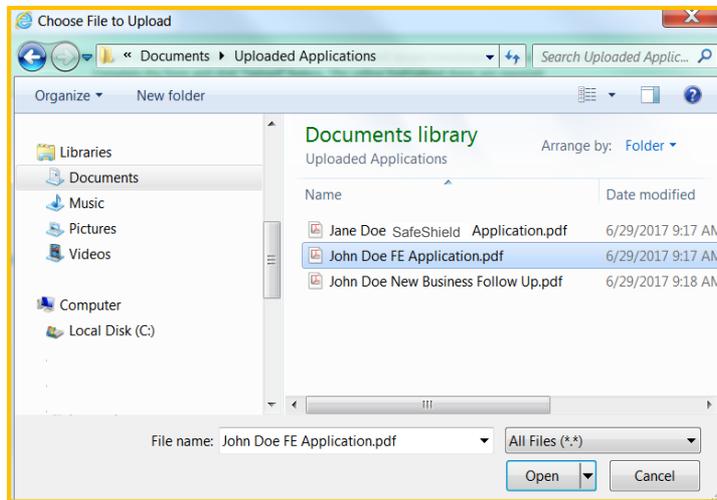
Click or tap "Choose Files"

HOW IT WORKS

UPLOAD ELECTRONIC FILES

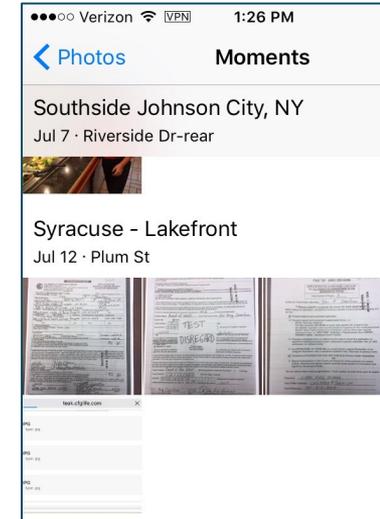
Files from computer:

- Click on the file(s) and click “Open” to attach files



Files from device:

- Tap the images to select, then follow your handheld’s instructions

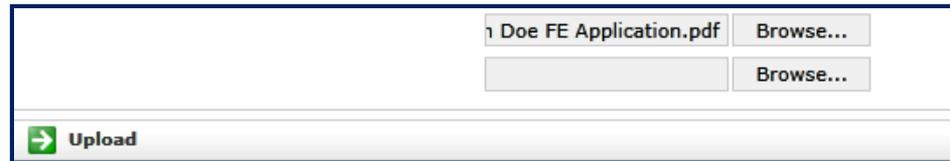


You may select up to 10 files, but do not combine multiple insureds or policies in one transmission.

HOW IT WORKS

UPLOAD ELECTRONIC FILES

Check to be sure the right files are selected and click or tap the Upload button.



The screenshot shows a web interface for uploading files. It features two rows of file selection controls. The first row contains a text input field with the filename "Doe FE Application.pdf" and a "Browse..." button. The second row contains an empty text input field and another "Browse..." button. Below these rows is a horizontal bar with a green arrow icon and the text "Upload".

That's it! You're done! The documents will be processed at the office the same way they would if they had been faxed. Once the documents are processed, you will receive automated email notifications in the usual manner.

HOW IT WORKS

UPLOAD SUMMARY

The next screen confirms that the upload was successful or, if there is a problem, it will let you know.

Document Upload

Upload succeeded. 1 files were received.

Upload Next Document(s)

Sender Details

Received	06/29/2017 10:10:48 AM
Sender	Columbian Representative
Sender Email	CFG_Rep@cfglife.com
Sender Phone	800-423-9765

Information related to this transmission

Send To	New Business
Product	Final Expense
Insurance Company	Columbian Life
Insured First Name	John
Insured Last Name	Doe
Is this a new application?	Yes
Remarks	Add any additional remarks here if needed.

Uploaded Files

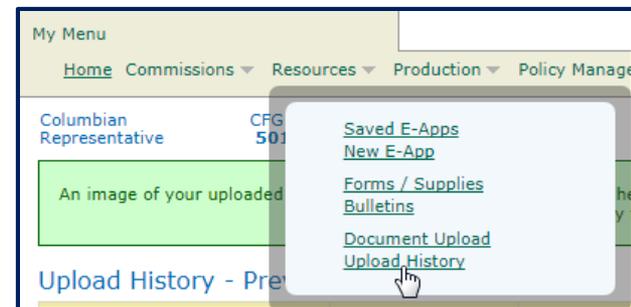
Filename	Size	Type	Status	Details
John Doe FE Application.pdf	35.25 KB	application/pdf	SUCCESS	

Upload Next Document(s)

HOW IT WORKS

UPLOAD HISTORY

To see your upload history, go to Resources / Upload History.



Upload History - Previous 90 days			
Received	Sent To	Product	Insured
08/04/2017 11:22 AM	New Business	Final Expense	Doe, John
08/04/2017 11:03 AM	New Business	Ordinary	Doe, Jane
08/03/2017 11:01 AM	New Business	Final Expense	Schwarzkopf, Norman
08/03/2017 10:55 AM	New Business	Final Expense	Schlesinger, Leon
08/03/2017 10:09 AM	New Business	Final Expense	Little, John

A summary of your upload will be available in your Upload History for 90 days. Images will be available for 14 days after upload.

HOW IT WORKS

UPLOAD HISTORY

Upload History - Previous 90 days

Received	Sent To	Product	Insured
08/04/2017 11:22 AM	New Business	Final Expense	Doe, John
08/04/2017 11:03 AM	New Business	Ordinary	Doe, Jane
08/03/2017 11:01 AM	New Business	Final Expense	orman
08/03/2017 10:55 AM	New Business	Final Expense	Schlesinger, Leon
08/03/2017 10:09 AM	New Business	Final Expense	Little, John

Click or tap a link to see the upload summary.

Sender Details

Received 08/03/2017 10:55:23 AM
 Sender 501009 Columbian Representative
 Sender Email bogus_blacklist@cflife.com
 Sender Phone

Information related to this transmission

Send To New Business
 Product Final Expense
 Insurance Company Columbian Life
 Insured First Name Leon
 Insured Last Name Schlesinger
 Is this a *new application*? Yes
 Remarks

Uploaded Files

Filename
[Capture.PNG](#)

Click or tap a link to see the image.

DOCUMENT UPLOAD

TRY IT TODAY!

Now you know how
to go from this...



to this!



Start using Document Upload today to get your business submitted faster and easier than ever!

For help logging into the Partners Website or using Document Upload, contact the Sales Support team at 800-423-9765, extension 7582 during business hours.



Columbian Mutual Life Insurance Company

Home Office: Binghamton, NY
Administrative Service Offices:
Binghamton, NY • Syracuse, NY

Columbian Life Insurance Company

Home Office: Chicago, IL
Administrative Service Offices:
Binghamton, NY • Syracuse, NY

Columbian Life Insurance Company is not licensed in every state.

Form No. 5403CFG (Rev. 10/20)