

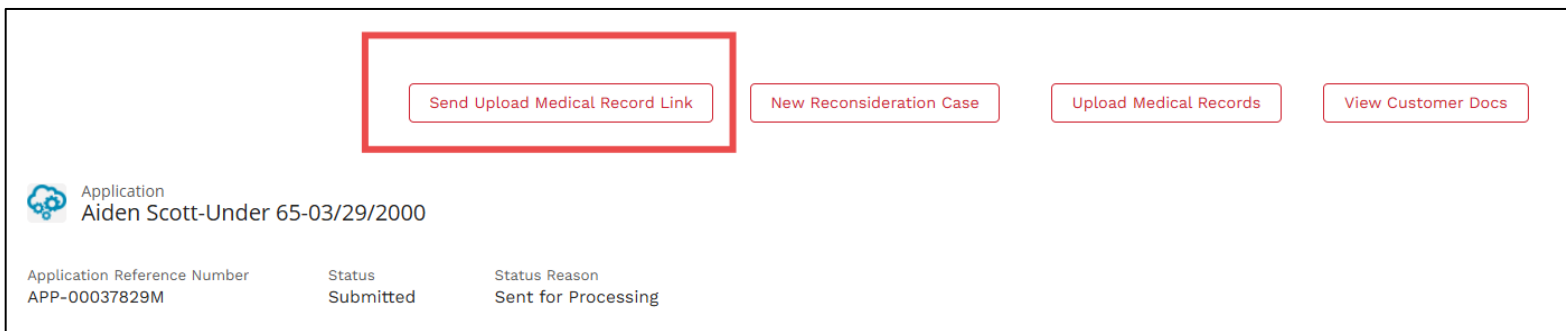
Uploading Medical through the Upload Link

Medical Upload by the Applicant via Medical Upload Link:

When an agent submits an application, they will see the capability to send the applicant a link in order to upload their medical records via the Shopping Portal.

IMPORTANT The medical upload capability does not apply to information needed for pre-existing waiting periods, claim issues, etc and the appropriate process should be followed for these situations.

Directly **after** submitting their application, the agent will see the option to **Send Upload Medical Record Link** in the upper right corner of the screen.



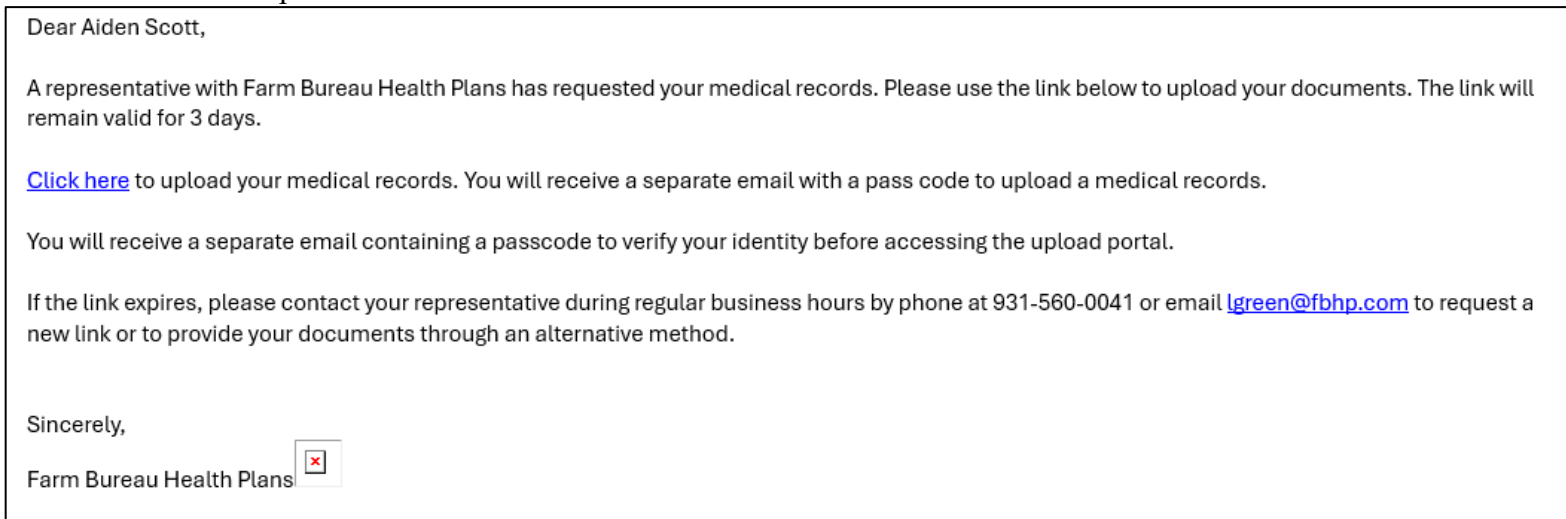
The screenshot shows a user interface for an application. At the top, there are four buttons: "Send Upload Medical Record Link" (highlighted with a red box), "New Reconsideration Case", "Upload Medical Records", and "View Customer Docs". Below these buttons, there is a section for the application details. It starts with a blue icon and the text "Application Aiden Scott-Under 65-03/29/2000". Below this, there is a table with three columns: "Application Reference Number", "Status", and "Status Reason". The first row of the table contains the values "APP-00037829M", "Submitted", and "Sent for Processing".

Application Reference Number	Status	Status Reason
APP-00037829M	Submitted	Sent for Processing

This will send **2 emails to the applicant** (similar to how the application transfer link works when a quote is sent).

- One email contains a link in order to upload the requested medical records to their application
- The other email contains the one-time passcode needed to access the link

Like the transfer application link, the medical upload link is valid for 3 days and can be resent once expired or if additional medical needs to be uploaded.



The screenshot shows an email template. It starts with "Dear Aiden Scott,". The main body of the email says: "A representative with Farm Bureau Health Plans has requested your medical records. Please use the link below to upload your documents. The link will remain valid for 3 days." Below this, there is a blue link "Click here" followed by the text "to upload your medical records. You will receive a separate email with a pass code to upload a medical records." The next line says: "You will receive a separate email containing a passcode to verify your identity before accessing the upload portal." The final paragraph says: "If the link expires, please contact your representative during regular business hours by phone at 931-560-0041 or email lgreen@fbhp.com to request a new link or to provide your documents through an alternative method." The email ends with "Sincerely," and a signature block for "Farm Bureau Health Plans" with a red 'x' mark.

Once the one-time passcode is entered they will need to either Login (if they have created an account in the past) or Register for an account.

- This process is the same as the one outlined in the Application Transfer Link document under Shopper/Prospect Accessing Link

After Login/Registration has been completed, the applicant will be directed to the page where medical can be uploaded.

Applications Cases

Return t

Application Details

Application Reference #:

APP-00037829M

Subscriber ID:

Effective Date:

11/01/2025

Application Name #:

Aiden Scott-Under 65-03/29/2000

Application Type :

Under 65

Application Status:

In Process

Applicants

NAME	RELATIONSHIP	DATE OF BIRTH
Aiden Scott	Primary	03/29/2000

Upload Medical Files

NAME

New File

Uploaded File

Please Upload medical file to proceed next

Cancel

Select New File.

Upload Medical Files

* Name

Error: Name is required.

* File

Upload Files

Or drop files

Please upload files in PDF format only. Ensure the file name does not exceed 100 characters.

Cancel

Save

They will select the **name of the applicant** for which the medical records are for from the drop down list that will appear when they click within the Name field.

They can either select the **Upload** option or **Drag and Drop** the PDF file into the **File** field.

IMPORTANT

- Files MUST be in PDF format. Any other format being uploaded will result in an error being received.
- File Name of the PDF being uploaded cannot exceed 100 characters.

Once file is uploaded and visible on the screen they will select **Save**.

TIP

Multiple files can be loaded for different applicants on the application during this time.

They will be able to verify all files uploaded correctly and select **Submit**.

Upload Medical Files

NAME

Bill-Test-Primary-03/11/1990

New File

Uploaded File

ProofOfCoverage.pdf

Cancel

Submit

Once submitted they will receive the following confirmation and an email is sent to Underwriting as well as the Applicant submitting the medical records as confirmation.

Your medical record files are uploaded. Please note the Reference # **FRM-000004172** for your medical records file

Done