

TRANSAMERICA DOCUMENT UPLOADS

TRANSAMERICA LIFE INSURANCE COMPANY BUSINESS MANAGEMENT APP

It is easier and more convenient than ever to upload documents for policies to the Transamerica Life Insurance Company Business Management App. Our new document uploading tool works on PC and Mac as well as iOS and Android platforms on laptops, desktops, tablets, and mobile devices. Take a minute to familiarize yourself with this powerful new tool. We know you work hard to provide your clients with the quality service they deserve, and we are working hard to help you achieve your business goals.

INSTRUCTIONS:

- 1 From the client's policy detail, click the **Upload Documents** hyperlink.

AGENT NET INFO Your online business resource

Change Password [Redacted] Monday, June 6, 2022

Preferences OFF

View Others

Home > Pending Reports > Pending Policy Search

BACK

EMSI Website

Interval Summary Reports

Manager Pend Premium Collection Summary

Naliba Download

Pending Policy Search

Pending Policy Summary

Pending Requirements Summary

Personal Pend Premium Collection Summary

TA Pending Summary

User Guide - Pending Plan Name List

User Guide - Pending Requirement Codes

User Guide- Pending Reports

View Others

Pending Policy Detail

[Redacted]

Step 1

To view or print a requirement document created by New Business, click on the Adobe PDF icon for that requirement.

Email NB/UW Upload Documents User Guide Back

[Redacted]

✓ Pending Requirements (Note: Click on column heading to sort)

Requirement	Req Owner	Req On	Instructions	Comments	Req Status	Date Ordered	Date Completed
Automatic inquiry of MIB data base	Home Office	[Redacted]	Ordered by Home Office		Received	04/23/2012	04/23/2012

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In the new browser window displayed, drag your file(s) from your computer to the **Drop Files Here or Click to Browse Files** field. Alternatively, you can click the **Drop Files Here or Click to Browse Files** field to open the local folder on your computer, and then you can search for and select the file(s) you want to load.

Note: If you are uploading files in the PDF format, each document must be uploaded individually (even if they are for the same policy) but split out correctly by the individual form numbers.

The screenshot shows the 'ANI New Business' form. At the top right, there is a 'Help' icon and a 'LOG OUT' button. The form includes fields for 'Date Of Birth' (11/18/1970), 'Office ID', and 'Agent Type'. Below these fields, there are two main buttons: 'DROP FILES HERE OR CLICK TO BROWSE FILES' and 'SCAN DOCUMENTS'. A red box labeled 'Step 2' highlights the 'DROP FILES HERE OR CLICK TO BROWSE FILES' button.

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Check the file(s) listed in the **File Name** field.

- If you have selected the correct file(s), click the **Add Files** button.
- If you selected the wrong file(s), click the  button to the right of the file name(s). A message is displayed asking you to confirm that you want to discard the file. After you locate and upload the correct file(s), click the **Add Files** button.

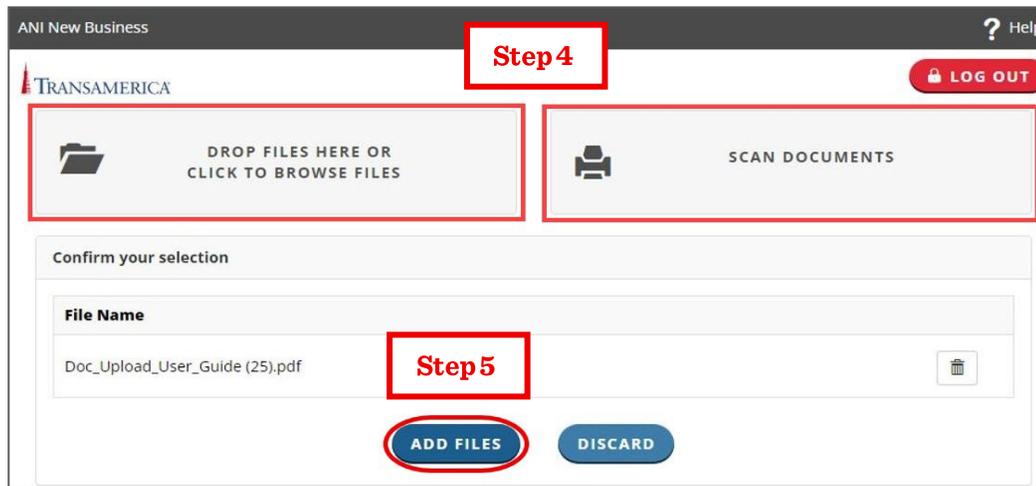
The screenshot shows the 'ANI New Business' form with the 'Confirm your selection' section. It displays a table with one row containing the file name '2198022_0522 Documents Upload Guide_v1 SW EDITS 5-23-22.pdf'. To the right of the file name is a trash icon. Below the table are two buttons: 'ADD FILES' and 'DISCARD'. A red box labeled 'Step 3' points to the trash icon, and another red box points to the 'ADD FILES' button.

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If you have more than one document to upload for the same policy, you can repeat the process by clicking the **Drop Files Here or Click to Browse Files** button and uploading additional files. If you have a digital scanner connected to your computer, you may click the **Scan Documents** button to download any necessary software and follow the directions provided to scan documents directly into the portal.

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After you upload each file, you must click the **Add Files** button.

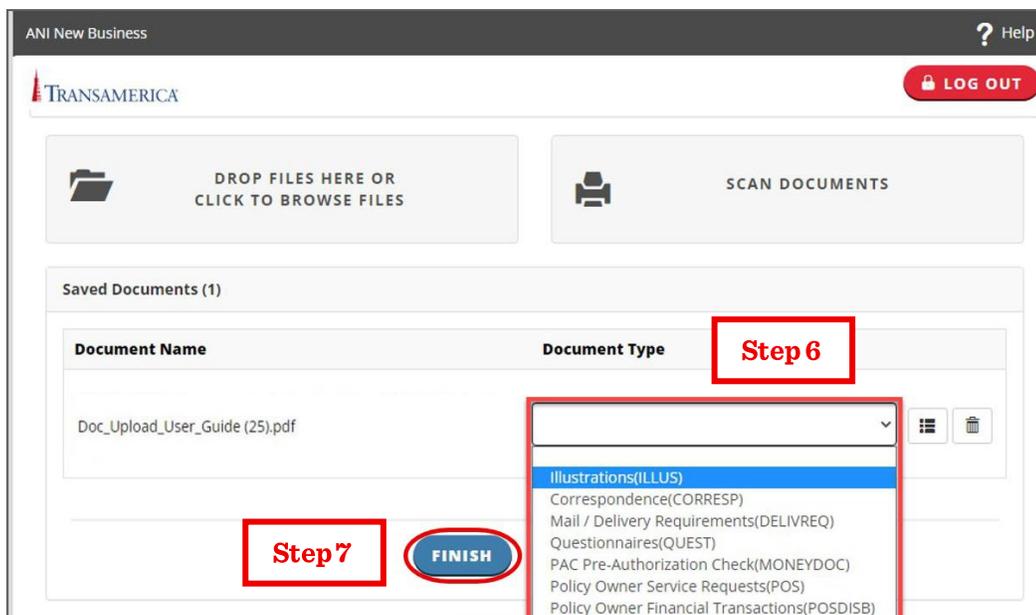


6

Once you have uploaded the file(s) you want to load for the policy, select an option from the **Document Type** drop-down field to identify the type of document(s) you have uploaded.

7

After you select the document type for all documents you are uploading, click the **Finish** button.



8

If you would like to have a confirmation sent to your email address, click the **Yes** option for the **Send me confirmation email** field and enter your email address. Click the **Submit** button.

ANI New Business

TRANSAMERICA LOG OUT

Last Name:

Send me confirmation email Yes No

Email Address:

Message (OPTIONAL):

SUBMIT GO BACK

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IMPORTANT: Write down your confirmation number. Do NOT upload documents that contain credit card information. You may close the window to return to the Business Management App.

TRANSAMERICA

Upload Confirmed

Your files have been processed
Confirmation number is **653**

If you chose to receive a confirmation email you should receive it shortly. If you would like to upload additional documents please close this window and return to the Policy Management to choose a different policy.

CLOSE WINDOW Step 9

1-800-322-3796

Disclaimer: This site should not be used for uploading documents containing credit card information, any such information will be deleted from our systems.



QUESTIONS & ANSWERS



YOU HAVE QUESTIONS? WE HAVE ANSWERS.

Q. What file types besides PDF and TIFF can be accepted?

A. Currently supported file formats:

- Portable Document Format (PDF)
- Word Document 97-2007 (DOC) 2007 and later (DOCX)
- HTML documents (HTM or HTML)
- Text files (TXT)
- Image files (TIF, JPG, PNG, GIF)

B. What is the file size limit?

A. Maximum file size is limited to 28 MB.

Q. How many forms can I upload at one time?

A. We recommend 20 or less.

Q. What is the approximate time frame for the confirmation email to be received?

A. The confirmation email is sent within 5 minutes from the moment the user reaches the confirmation page.

Q. What internet browsers can I use?

A. The solution supports all major browsers including Edge, Chrome, Firefox, and Safari on PC and Mac. If an older, unsupported browser is detected, the site will automatically recommend an upgrade.

Q. Can I use a Mac?

A. Yes, all features are supported on Mac (macOS 10.15 or newer versions recommended).



Q. Can I use my mobile device?

A. Yes, the solution supports all major mobile platforms (iOS, Android) and types (tablet, phone), but some features (like in-browser scanning) are not supported.

Q. Does the Web view look the same as a Desktop view?

A. The user interface is responsive (i.e., automatically adjusts the layout, font, and image sizes for the device type and screen size). On larger tablets, the Web view looks very similar to the Desktop view. On smaller devices and phones, the layout is more condensed with fields stacked to accommodate the smaller screen size.

Q. Which option should the agent select - Click to Browse Files button or Scan Documents button? Would choosing this option open the photo app where the potential document is stored?

A. The options available when clicking the **Click to Browse Files** button will vary depending on platform. In most cases, the user will be able to use the built-in camera or access the picture gallery to load files. Some devices may also allow access to local files or document folders.

