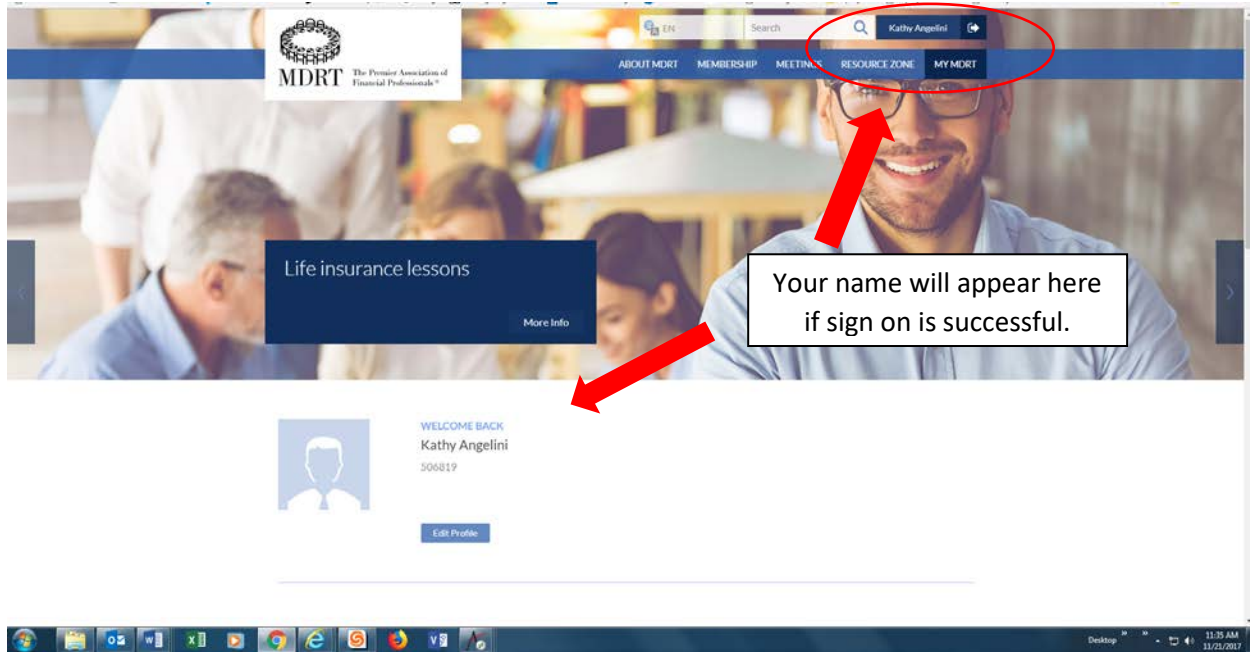


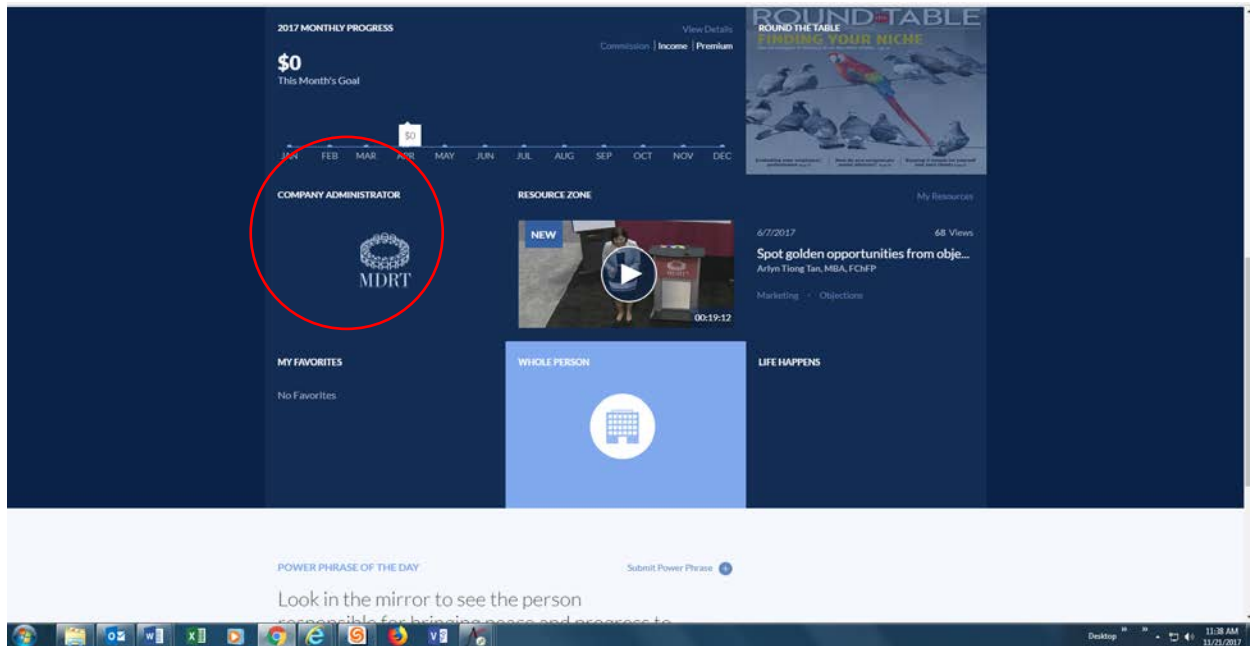
EFP – Electronic Excel Production Instructions

How a Company Administrator will upload production into members' records.

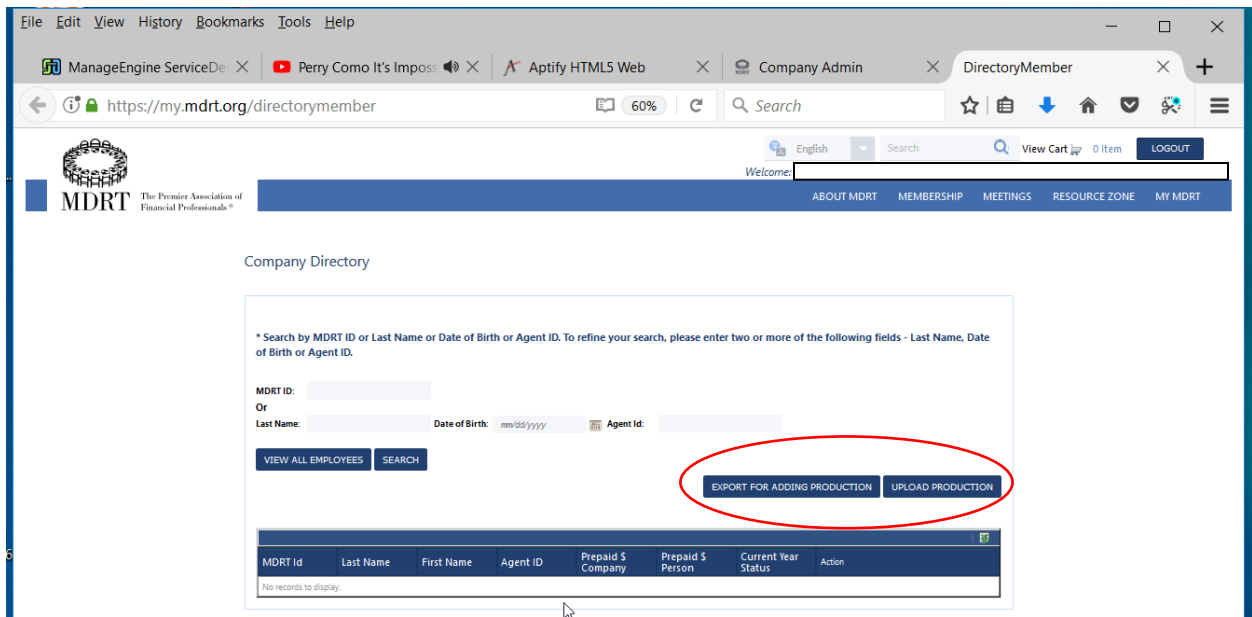
Logging in as a Company Administrator gives you the ability to generate a file of all person records on file in our database that are affiliated with your company. Sign in to MyMDRT.com.



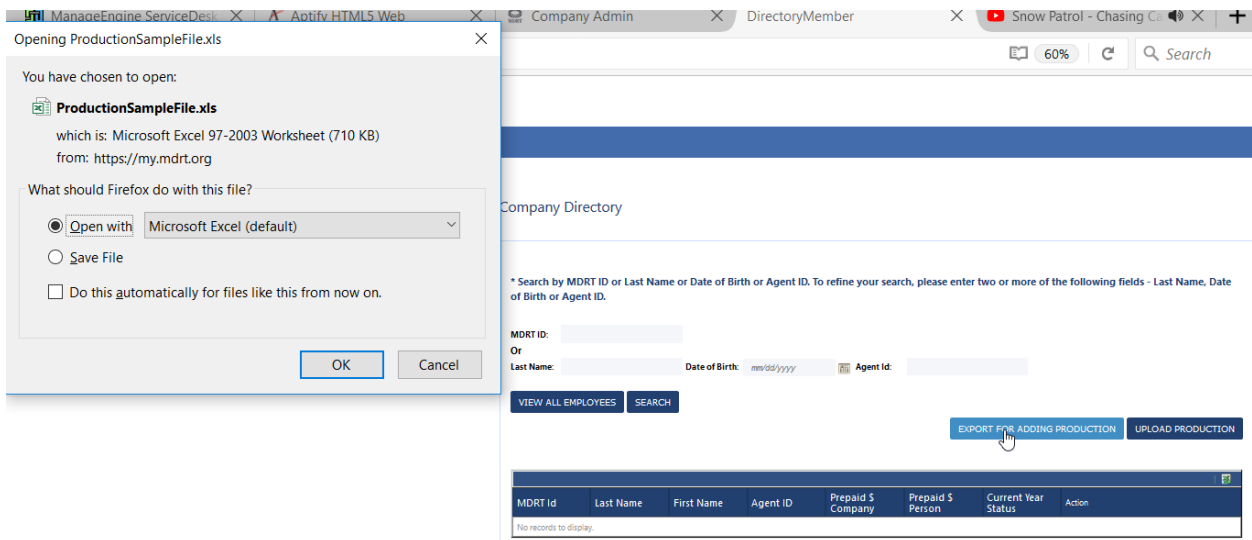
Scroll down the web page to the Company Administrator tile.



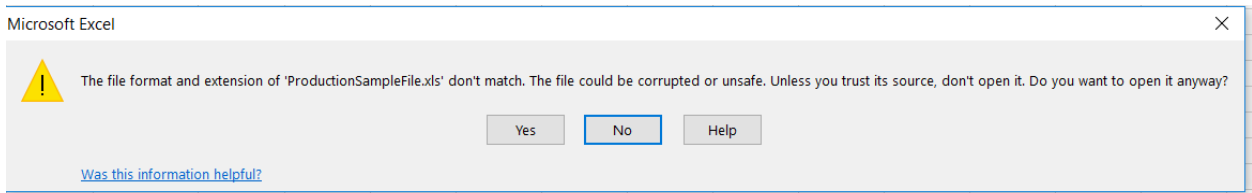
Clicking on the Company Administrator tile will link you to the Company Administrator page, displayed below.



Clicking on the EXPORT FOR ADDING PRODUCTION button will open a screen (see screenshot below) for accessing the Excel file of all person records currently affiliated with your company.

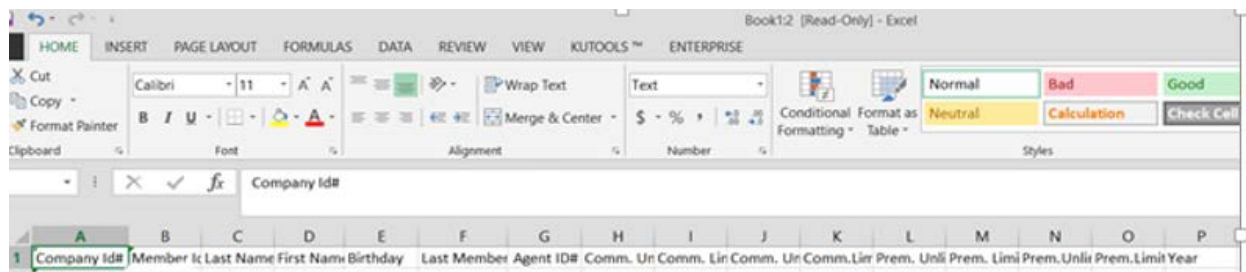


Click on the “Open with” radio button to open this Excel file.



Click on the Yes button to proceed with accessing the generated Excel file (see below).

Excel file of all agents for selected company. **Please note that the Member IDs and birth dates** in the below example were removed for security reasons.



The member's information will appear under these headings.

Save the Excel file with the Excel 97-2003 Workbook (*.xls) extension to a local drive.

Rename the file: Company number – Company Name –Batch # (if necessary) - Date file is created

- Please note that all person records affiliated with this company will show up on this list.
- Remove all MDRT ID numbers whose production isn't being sent for.
- Remove all MDRT ID numbers whose production has already been sent to MDRT.
- If multiple files are necessary, please batch your files (i.e., batch 1, batch 2 and so forth).

Reminder: Each file/batch should only include production that is to be entered.

- Load the previous year's final production data for all of your agents for annual membership.
 - Sample: 2018 membership year – production credit will be based on eligible production received during 2017 or previous year.
- Only Commission and Premium production will be accepted.
- Income is self-certifying and will NOT be entered electronically.
- Be sure to change the year in **column P** for all records to the membership year that you want these members approved in.
- All production must be converted to U.S. dollars using the MDRT conversion factor for applicants outside the United States.
- Please be sure to load production amounts as whole numbers with no decimals.
- Please note that this file is only used for importing production data, thus making changes to other columns of data will result in a wasted effort, as these changes will not be applied to that person record.

Process for Uploading Company Production Files

Company Directory

* Search by MDRT ID or Last Name or Date of Birth or Agent ID. To refine your search, please enter two or more of the following fields - Last Name, Date of Birth or Agent ID.

MDRT ID:

Or

Last Name: Date of Birth: Agent ID:

MDRT Id	Last Name	First Name	Agent ID	Prepaid \$ Company	Prepaid \$ Person	Current Year Status	Action
No records to display.							

Clicking on the **UPLOAD PRODUCTION** button will allow a company to upload their company production file to a site that MDRT will routinely monitor, and import into our system. The file must match the format of the member file generated via the **EXPORT FOR ADDING PRODUCTION** option.

Company Directory

* Search by MDRT ID or Last Name or Date of Birth or Agent ID. To refine your search, please enter two or more of the following fields - Last Name, Date of Birth or Agent ID.

MDRT ID:

Or

Last Name: Date of Birth: Agent ID:

To upload a file, fill in the information shown below ✖

File: No file selected.

MDRT Id	Last Name	First Name	Agent ID	Prepaid \$ Company	Prepaid \$ Person	Current Year Status	Action
No records to display.							

Click on the **Browse** button to search for and select the company production Excel file that you want to upload to MDRT. Select the production and click the **UPLOAD** button. Time Frame: 1–3 business days.