## **EEP – 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 affilated with your company. Sign in to MyMDRT.com.



Scroll down the web page to the Company Administrator tile.

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

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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.

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

Microsof	Excel
	The file format and extension of 'ProductionSampleFile.xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway?
	Yes No Help
	Was this information helpful?

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.

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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** 

Company Directory

* Search by of Birth or A	MDRT ID or Last Na Igent ID.	me or Date of Birl	th or Agent ID. To	o refine your sear	ch, please ente	r two or more of	the following f	ields - Last Name, Date
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MDRT Id	Last Name	First Name	Agent ID	Company	Person	Status		

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.

* Search by of Birth or	y MDRT ID or Last Agent ID.	t Name or Date of Bi	th or Agent ID.	To refine your sear	rch, please ente	er two or more of t	he following fields - Last Name, Date
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MDRT Id	Last Name	First Name	Agent ID	Prepaid \$ Company	Prepaid \$ Person	Current Year Status	Action
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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.