



The Premier
Association of Financial
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Electronic Excel Production – Quick dates and links

End of November – December 10

- Invites will be sent to companies.
- A Company cleanup file will be sent all invited Companies.
 - The cleanup is named: (Company Number) (Company Name) **Cleanup file** (Date).
 - This is not a production file, only a cleanup file.
 - File can be sorted by last member year to find your most recent members.
 - Necessary updates:
 - Add or update an agent ID number.
 - Check that names are correct.
 - Check date of birth is correct.
 - Place an “N” in the affiliated Y/N column to indicate an agent is no longer working for your company. They will no longer be affiliated with your company in our database.
 - Send correctly titled file back to KAngelini@mdrt.org so that corrections and additions can be processed.
- All individual users will need to log in using their username (MDRT ID number unless already updated by user) and password. If you need your login information, please contact membership@mdrt.org.
 - Go to my.mdr.org and log in using your username and password.
 - Go to mdrt.org/my-mdrt and click on the Company Administrator tile, or navigate directly to: mdrt.org/company-admin/.
 - Scroll to the bottom of page and click on the Administrator Functions link, or navigate directly to: my.mdr.org/directorymember.
- See link for PDF containing detailed instructions regarding the Electronic Excel Production Program.
- Download and fill out the EEP Certificate, and return to KAngelini@mdrt.org.
 - **EEP Certificate must be returned.** Production will not be accepted without a signed certificate.
- Companies can request new member ID numbers and applications by using the spreadsheet found at mdrt.org/companies. New agents must have an MDRT ID number before production can be loaded to their record.
- **Please return the EEP certificate, the cleanup spreadsheet and any requests for new IDs by December 10, 2018, to ensure adequate processing time.**

December 10, 2018 – January 7, 2019

- EEP Certificate needs to be returned and approved.



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- The cleanup spreadsheet needs to be returned to KAngelini@mdrt.org for database updates and processing.
- Companies can start to request new member ID numbers and applications at any time.

January 7, 2019

- Companies should have already received their new member ID numbers, if requested.
- **Companies can begin uploading Electronic Production — follow PDF instruction in the EEP section under companies after sign in. found on link.**
 - Save the Excel file with the Excel 97-2003 workbook (*.xls) extension to a local drive.
 - **File name must be:** (Company Number) (Company Name) (Date).
 - Completed certificate must have been returned to MDRT before processing.
 - Production will not be accepted without a signed certificate.
 - Confirmation email will be sent once the production is entered.
 - This process may take up to five business days.

USD 200 late filing fee for applications postmarked or processed online after March 1.

Contact KAngelini@mdrt.org with questions.