

Uploading Request for Information (RFI) documents from your Broker Portal

- From your Dashboard Select the “Clients” tab

The screenshot shows the be well nmr dashboard. At the top, there are links for 'Learn More', 'Accessibility', and 'Language: English'. A search bar is also present. The user is logged in as 'Adriano (Broker)'. The 'Clients' tab is highlighted with a blue arrow. Below the navigation bar, the 'Dashboard' section features an 'Authorization' widget. This widget includes a donut chart for 'Total Clients' (1) and a status summary: Pending (0), Authorized (1), Rejected (0), and Revoked (0). A description below the chart reads: 'Donut graph representing the spread of clients with different authorization statuses.' At the bottom of the dashboard, there is a section for 'Eligibility and Enrollment' and a 'Contact Us' button.

- Then click on “Act on Behalf of” for the client you wish to upload documents for

The screenshot shows the 'Clients' page. At the top right, there are buttons for 'Download List' and 'Add Client'. Below these, there are filter options: 'Filter By: Name, Contact Details, Eligibility Status, Payment Status, Client Status'. The page indicates '1 Client Found' and 'Show: 10'. A table lists the client details:

Name	Contact Details	Assigned Broker	Eligibility Status	Payment Status	Client Status	Actions
[Redacted]	[Redacted]	Adriano Lujan	2022:Submitted	Pending	Authorized	•••

Below the table, there are navigation arrows and a 'Back to Dashboard' button. A blue arrow points to the 'Act on Behalf of' option in the actions menu for the client. The menu also includes 'Create Quote', 'Manage Quotes', and 'Notes'. A 'Contact Us' button is visible at the bottom right.



Dashboard

Report a Change | Alerts

Account Reference ID: RefID: [REDACTED]

Contact Information [View/Edit Profile](#)

Email Address [REDACTED]

Phone Number Ext.

What I need to do

Existing Application
[Go to Eligibility Application](#)

2022 Eligibility Application

- **Select Documents tab**



Manage Documents

[Upload Documents](#)

Filter By: Document Description | Uploaded By | Uploaded On | Status

0 Document Found | Show: 10 | [Documents Required](#)

Document Description | Uploaded By | Uploaded On | Status

No Documents Found

- **Upload Documents**

You can upload up to 5 files at one time.

File 1

Upload File * [Supported file formats and maximum size](#)

Browse

Add File

Upload Documents

Back

Document Description *

Select one or more

- Proof of Marriage
- Proof of New Legal Dependent
- Proof of Divorce
- Proof of Death
- Proof of Income
- Proof of Incarceration Status

- **Browse your computer for the file you wish to upload and select what the document you are uploading from the drop down. Then click on upload documents.**