Job Aid

Audience: External Brokers and Field Agents

Topic: DRX – How to attach documents to enrollment

Solution: Within DRX, the broker/agent can attach any scanned document to the enrollment when on the Agent Info screen.

1. Login to DRX using your credentials
2. Create the beneficiary's profile as usual
    - Select ***New Profile*** > ***Beneficiary***
    - Enter profile information
    - Click **Save**
3. Search for and select the desired plan
    - Click **Continue to Plans**
4. Click Add to cart
5. Click Complete and submit form myself
6. Click **Continue to apply**
7. Enter the data required in the Contact Information screen
8. Click **Next**
9. Enter the data required in the Benefits Information screen
10. Click **Next**
11. Enter the data required in the Other Information screen
12. Click **Next**
13. Enter the data required on the Agent Information screen
14. Click **Choose Files** on the Agent Information screen
15. Search for and select the desired documents to upload
16. Click **Open**
    - The document is now attached to the enrollment
    - Repeat step 13-15 as desired to upload other files
17. Click **Next**
18. Complete the information required on the Submit screen
19. Click **Submit**