



**Texas Department of Insurance**  
**Agent and Adjuster Licensing Office, MC 107-1A**  
333 Guadalupe • P. O. Box 149104  
Austin, Texas 78714-9104  
www.tdi.texas.gov

## ATTACHING A DOCUMENT ELECTRONICALLY

Use the **Attach Supporting Documents** service to securely submit to certain states documentation supporting an answer to a background question on a license application.

To open the **Attach Supporting Documents** page, choose one of the following methods:

- At the end of license application process, in the green message box at the top of the **License Application Confirmation** page click the **Attach Documents** link

The process involves the following steps:

### Uploading Supporting Documentation

1. If the documentation is already in Microsoft Word, Microsoft Excel, or Adobe PDF file format, the system will accept them as is. However, if you have only a paper document, use an electronic scanner to scan the paper document and convert it to an electronic image file of a supported file type. (See **Notes**, below.)
2. Save the scanned image file to your computer file system.
3. In the **Attachments** section of the **Attach Supporting Documentation** page, click the **Browse** button. The **Choose File** dialog box will open.
4. Use the navigation options on the **Choose File** dialog box to locate the electronic file on your computer system. When the correct file name appears in the **File Name** field, click the **Open** button. The **Choose File** dialog box will close, and the system path to the file will appear in the **Select a Document** field to the left of the **Browse** button.
5. In the **Document Description** field, enter a brief document description of the file you are attaching to the license application. Maximum 32 characters.
6. Click the **Attach** button. The system will upload the selected electronic file. When it is finished, the file's name and description will display in a table in the **Attachments** section.
7. Repeat the preceding steps for each document you wish to upload.

## Attach Supporting Documents

SYLVIA SPARKS

### License Applications

*You may attach files to the license applications below.*

State	License Number	License Type	Date Submitted	Status
TX		General Lines Agent	09-09-2014	Submitted

### Attachments

- Use the fields below to locate and describe documents to attach to your license application requests.
- Clearly identify why you are attaching the document in the Document Description field.
- Note that the attachments you provide will only be sent to the specific states listed above.
- Please see the FAQs below for more information.

Select a Document

Document Description

C:\Users\sspark\Desкто Browse... Explanation to Background Question 7

Attach

### Frequently Asked Questions

- [How do I know what documents to attach for each state?](#)
- [What if I don't have the documentation right now, or I don't have an electronic copy?](#)
- [Are my documents secure when I attach them?](#)
- [What if I do not see my license listed above?](#)

Cancel

Submit

## Submitting Supporting Documentation

1. In the **License Applications** section of the **Attach Supporting Documentation** page, review the list of states to which you have applied for a license application. By default, all of the documents listed in the table in the **Attachments** section will be attached to license applications submitted to the listed states.
2. If desired, to instruct the system not to send a selected uploaded document to a particular state, click the **View/Modify Destination States** button () in the **Action** field of a selected document. Then, click to uncheckmark the checkbox corresponding to a state to which you do not want to submit the document. When you have finished, click the **Save** button ().
3. If desired, to edit the file description of a listed document, click the **Edit Description** button () in the **Action** field of a selected document. Modify the value in the **Edit File Description** field. When you are finished, click the **Save** button ().
4. If desired, to remove an uploaded document from submission altogether, click the **Delete** button () in the **Action** field of a selected document.
5. Once all desired documents are uploaded, click the **Submit** button. Each document will be encrypted, attached to its related license application transaction, and transmitted securely to the state. The **Supporting Document Confirmation** page will open, displaying each attached document and the destination state(s).
6. If desired, click the print link in the green box at the top of the page to print the **Supporting Document Confirmation** page on a local printer.
7. To complete process, click the **Submit** button.

## Attach Supporting Documents

SYLVIA SPARKS

### License Applications

You may attach files to the license applications below.

State	License Number	License Type	Date Submitted	Status
TX		General Lines Agent	09-09-2014	Submitted

### Attachments

- Use the fields below to locate and describe documents to attach to your license application requests.
- Clearly identify why you are attaching the document in the Document Description field.
- Note that the attachments you provide will only be sent to the specific states listed above.
- Please see the FAQs below for more information.

File Name	File Description	Size	Date Attached	Action
FAQ.pdf	Explanation to Background Question 7	171.21 kb	09-10-2014	 

Key:  = Edit Description  = Delete

Select a Document

Document Description

<input type="text"/>	<input type="button" value="Browse..."/>	<input type="text"/>
----------------------	--	----------------------

### Frequently Asked Questions

- [How do I know what documents to attach for each state?](#)
- [What if I don't have the documentation right now, or I don't have an electronic copy?](#)
- [Are my documents secure when I attach them?](#)
- [What if I do not see my license listed above?](#)

## **Notes**

---

To review the background questions for which attachments may be required, go to the question **How do I know what documents to attach for each state?** Under the **Frequently Asked Questions** section. There, select **View State Specific Requirements**. A new window will open with the text of the questions.

If you do not have your electronic document ready at the conclusion of the license application or license renewal process, you can attach it to the application or renewal later. A state will hold your application or renewal in pending status until it receives your supporting documentation. To re-open the **Attach Supporting Documents** page, run the License Application Activity Inquiry or License Renewal Activity Inquiry, find your license application or renewal, and then in the corresponding **Action** column, click the **Attach Supporting Documentation** () button.

You may attach only documents with the following file types: Word (.doc or .docx), Excel (.xls or .xlsx), PDF (.pdf), JPEG (.jpg), TIFF (.tif), or PNG (.png).

If you have scanned a paper document to create an electronic file, use the scanner software application you are using on your computer to save the scan as one of the supported file types. Most scanner software programs offer a File menu, from which you can select Save As, and then save the scan as a PDF, TIFF, JPEG, or PNG file type. For additional assistance, consult the online help of your scanner software program.

---