

Client Success Center

How to: Upload a File



Easily send us medical records or other claim related documents

From the homepage, click the **Upload a File** button, and a window will pop up.

A screenshot of the "Upload a file" form. It includes a "Description" field with the text "Medical records Dr. Smith", a "Note" field, and a section for "Uploaded Files" showing "Dr. Smith medical records.pdf". Below this is an "Attach file(s)" section with an "Upload Files" button and "Or drop files" text. At the bottom are "Cancel" and "Save" buttons.

Type a description of the file(s) you are submitting into the **Description** field.

Provide additional details about your file(s) in the **Note** field. This field is optional.

Click **Upload Files**.

Locate the file(s) on your computer.

You can upload multiple files at one time, if needed.

A screenshot of the "Upload Files" progress bar. It shows a file named "Dr. Smith medical records.pdf" (78 KB) with a blue progress bar and a green checkmark. Below the progress bar, it says "1 of 1 file uploaded" and has a "Done" button.

A green checkmark displays when the file is uploaded.

Click **Done** once you see the green checkmark.

A screenshot of the "Upload a file" form after the upload is complete. The "Uploaded Files" section now shows "Dr. Smith medical records.pdf" and the "Upload Files" button is disabled. The "Save" button is highlighted.

When finished, click **Save**.

Your advocate will be notified each time you upload a file into the portal and they will review all files you submit.

View all files uploaded by you and your advocate

From the homepage, click **My Messages** in the top left menu.

A screenshot of the "My Messages" page. It shows a navigation bar with "My Info" and "My Messages". Below is a banner for "Application Pending with Social Security" with several status messages and icons.

Here you can easily see what files you have submitted to us through the portal and download those files at any time.

A screenshot of a message in the "My Messages" section. The message text says "You have successfully uploaded a file to The Advocator Group." and includes a "View File" link. The date/time is "6/23/2020, 02:37 PM".

Click **View File** to download the file.

Your advocate can send files to you through this page as well. You will be notified by email when your advocate sends you files.

A screenshot of a message in the "My Messages" section. The message text says "The Advocator Group has uploaded a file to you." and includes a "View File" link. The date/time is "6/16/2020, 09:52 AM".

Click **View File** to download the file.

