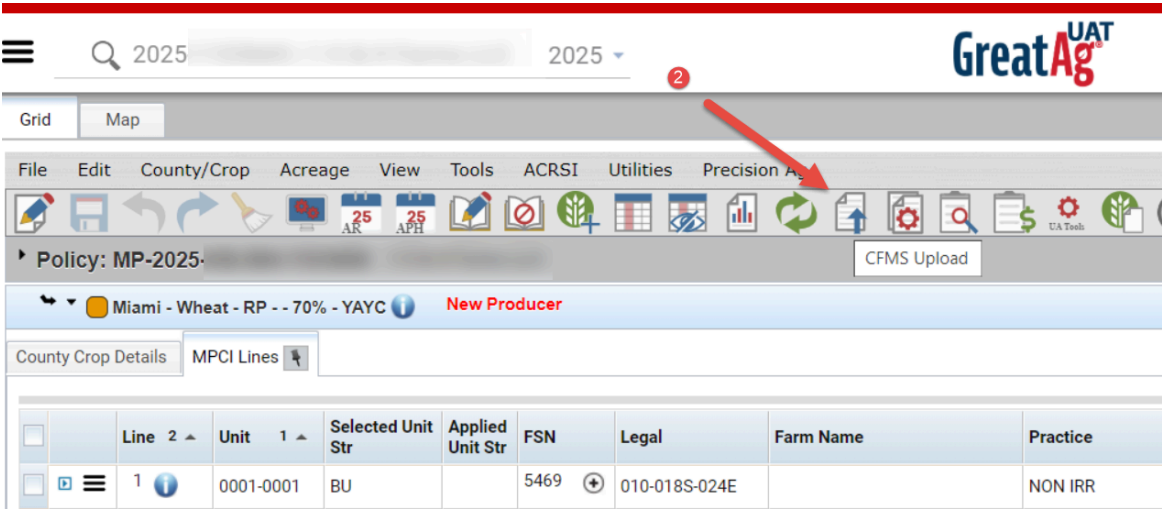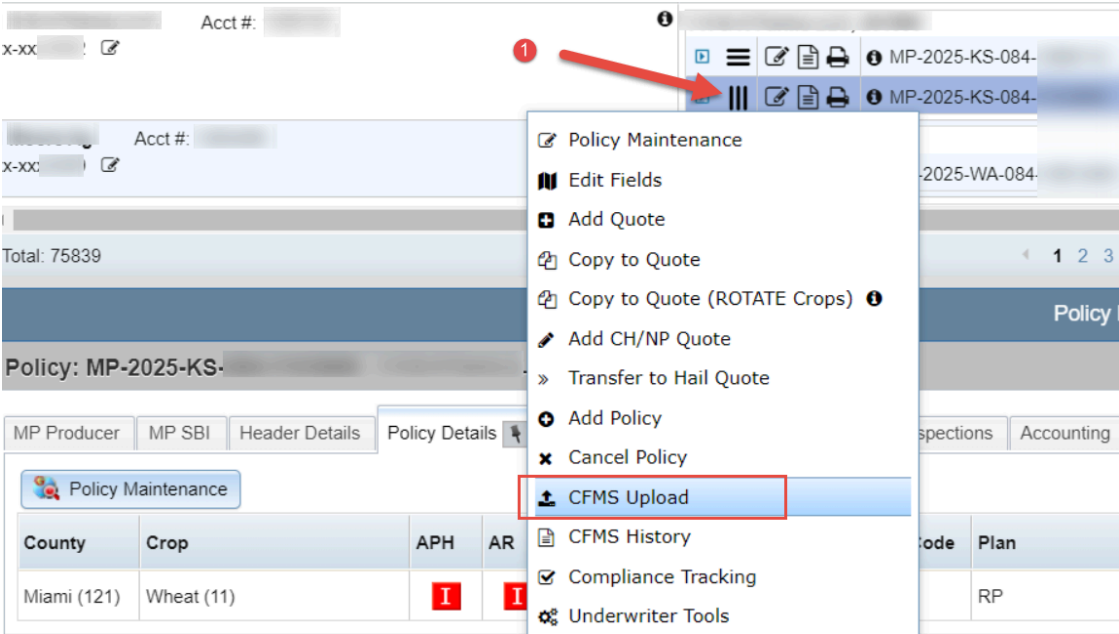The following quick card will show how a user can upload a single form to CFMS (Crop File Management System) in GreatAg. The uploaded form will then be attached to the policy for future review if needed. Please note that a batch upload process is also available and recommended to submit forms in GreatAg.

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Once keying has been completed in GreatAg, the approved form may be uploaded directly to the policy. Depending what screen the user is in will depend on where the upload function can be accessed.

1. Access policy form upload from the Accounts screen.
   a. Select the menu icon, the three bars, to access the policy drop down menu.
   b. From this menu, select 'CFMS Upload'.
2. Access policy form upload from Policy Maintenance screen.

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The following quick card will show how a user can upload a single form to CFMS (Crop File Management System) in GreatAg. The uploaded form will then be attached to the policy for future review if needed. Please note that a batch upload process is also available and recommended to submit forms in GreatAg.

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No matter which way the user accesses Form Upload, the steps to upload will be the same.

1. **Policy:** Choose which folder the form should be uploaded to. Will default to Policy.
2. **Multi-Peril:** Choose the line of business. This will default to Multi-Peril but CH can be selected as well. Look for Livestock forms to be available for upload in the future.
3. **Rein Year:** Select the reinsurance year the form should be uploaded to.
4. **Agency:** This field will default to the agency that the user is appointed to. If the user is appointed to more than one agency, please use the drop down to select the correct agency.
5. **Policy Number:** *This is not a required field.* Policy number can be entered here.
6. **Claim/Inspection #:** *This is not a required field.* If claim/inspection paperwork is being uploaded, the user may enter the claim/inspection number here.
7. **Comments:** *This is not a required field.* The user may enter any comments and these are attached to the upload, not the form.
8. **Add Files:** Attach the form to be uploaded here. Please note that multiple forms may be attached in separate files.
9. **Upload Files:** This is the submit button. Once clicked, the form will process in a batch and be submitted to GreatAg.
10. **Batch:** Once the file is uploaded, a batch is created and will display. Keep the batch number for your records as confirmation.

***Please note, the uploaded file will not display in CFMS, AKA as the document tree, immediately. The uploaded document will show in CFMS once it has been completed/reviewed on our side. ***

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