

## Online Application FAQs — For Companies

### **What is the online application?**

It is a start-to-finish online approval system that facilitates the submission and processing of the MDRT member application electronically.

### **How does the online application work?**

The system guides applicants through the application process, resulting in immediate approval for membership. Applicants can connect to their MDRT membership record, update their personal information, enter their production, upload an electronic copy of their certifying letter(s) and select the level of membership they desire. After completing all the steps and paying member dues, applicants receive immediate confirmation of their approval as an MDRT member.

*Note: Users must continue until they reach the “Approved” screen to complete the application.*

### **How is the online application different from completing a paper application?**

The system is more than just an online form. It interfaces with the MDRT membership database that houses the applicant’s membership record and the information the applicant provides. The system only displays membership options for which the applicant is eligible. Further, the system validates entries through each step of the application process and keeps the user from proceeding to the next step until all errors are resolved.

*Note: Online applications must be completed, submitted and approved **no later than March 1** to avoid the additional fee for late applications.*

### **What if I am having problems with the online application on March 1 and am in danger of missing the deadline?**

Online applicants who encounter difficulty may download and print their personalized application from the MDRT website and mail it by the deadline to avoid the additional fee.

### **How can a company interact with the online application?**

MDRT has created a section of the system for company administrators to view a list of MDRT members affiliated with the company and process membership applications on their behalf.

### **How do I access the company administrator section in the online application?**

Company administrators may log in to the system using their User Name and Password. Please contact MDRT for assistance in finding this information.

### **What if I don’t have a company administrator record or have forgotten my User Name?**

An email may be sent to Jenny Fisher ([jfisher@mdrt.org](mailto:jfisher@mdrt.org)) if you need assistance with your User Name.

### **What will I see after logging in?**

Company administrators are able to review and update their contact information. They can then proceed to the list of MDRT members affiliated with the company and process membership applications on their behalf.

*Note: The company administrator may not change the company affiliation in the administrator's record. This may be changed by MDRT staff only. Please contact Jenny Fisher ([jfisher@mdrt.org](mailto:jfisher@mdrt.org)) if assistance is needed.*

### **What can a company administrator do?**

A list of all the current and former MDRT members, as well as any new applicants who have listed the company as their affiliated company, is accessible. The list is searchable and shows the status of each agent's application ("In Progress" or "Approved"). The administrator is able to create and complete new applications, resume in-progress applications or upgrade approved members to a higher achievement level, if they qualify. These actions can be completed for any agents affiliated with the company. Please note that if a company administrator begins an application on behalf of an agent, this locks the agent out of the online application to prevent double processing. The administrator will need to use the drop down box to release the application back to the agent, if they wish to allow the agent to process their online application themselves.

### **What if an agent doesn't have an MDRT record?**

The company administrator may create a new record by going to <https://my.mdr.org>, selecting the "New User Signup" option and entering the necessary information.

*Note: It is important to use an existing MDRT ID number if one exists. Current or former members may not see certain membership options if they create a new record, as the system will not recognize them and will treat them as a first-time applicant.*

### **Is there anyone who cannot use the online application?**

The vast majority of applicants are eligible to use the system. Only those requesting a disability waiver for the first time, as well as anyone with an ethics complaint against them, will be kept from using the system. In those cases, the individual agent must contact MDRT staff and complete a paper application.

*Note: Anyone whose paper application has been received and is being processed at MDRT headquarters must complete the paper process and is not able to use the online application.*

**How long does it take to complete an online application?**

Applications that require production and payment information to be entered for each application will take up to 10 minutes. They can be completed much faster if you have certifying letters available in electronic format, if your company has supplied production data electronically to MDRT, or if payment arrangements have been made directly with MDRT. Please contact Member Relations at [memberrelations@mdrt.org](mailto:memberrelations@mdrt.org) if you would like to discuss submitting any of this information electronically.

**My company pays member dues. How will this work?**

The company can make arrangements with MDRT to put funds on deposit for applicants or company administrators to draw against. The deposit of funds can be done by bank draft or wire transfer.

Applicants or company administrators completing online applications will see the company dues payments reflected on the payment page.

*Note: Companies planning to pay dues and then have administrators or agents complete online applications must submit the funds and necessary form by February 17, 2020. The normal turnaround time for processing funds is five business days after receipt. Please contact Joanne Consiglio ([jconsiglio@mdrt.org](mailto:jconsiglio@mdrt.org)) in MDRT's Finance department.*

**What happens if the company funds have not been deposited with MDRT or the funds run out?**

A credit card will be requested from the applicant or company administrator on the "Check Out" page. MDRT accepts credit card payments by MasterCard, Visa, American Express, JCB and Discover.

*Note: Any reimbursement of member dues must be arranged between the company and the member.*

**How can we replenish funds for member dues?**

Please contact Joanne Consiglio ([jconsiglio@mdrt.org](mailto:jconsiglio@mdrt.org)) in MDRT's Finance department.

**My company only wants to pay member dues for certain levels of membership. Can that be arranged on the online application?**

To receive instructions regarding the details and format required, please contact Joanne Consiglio ([jconsiglio@mdrt.org](mailto:jconsiglio@mdrt.org)).

**My company only wants to pay member dues for certain people. Can that be accomplished?**

To receive instructions regarding the details and format required, please contact Joanne Consiglio ([jconsiglio@mdrt.org](mailto:jconsiglio@mdrt.org)).

**Can applications be submitted as a group electronically?**

No. Each online application must be completed and submitted separately.

**How do I submit production information for my company's agents?**

Companies may report production to MDRT using the Electronic Excel Production Certification process by making advance arrangements with MDRT. If the production has been reported to MDRT prior to accessing the online application, it will appear in the applicant's record.

**Note: The normal turnaround for processing company submitted files is five business days.**

If production has **not** been previously reported to MDRT, production will need to be entered and a certifying letter must be scanned and attached as a part of completing each individual application. The company administrator can choose among the commission, premium or income qualification methods, based on each applicant's MDRT record.

Once a qualification method is selected, the company administrator enters the applicant's production. They will then scan and attach an electronic copy of the certifying letter(s). PDFs, JPEGs and a number of other image files up to 4 MB are acceptable.

*Note: As with the paper application, all online applications are subject to audit.*

**What happens after the application is approved?**

After the application is completed and payment successfully made, the system provides immediate notice of approval to the member. The customary approval letter and membership certificate will be sent to the member in the mail.

The company administrator is able to print a copy of the payment receipt (if applicable) and an application summary for their records. Administrators also see the status of the applicant change to "Approved" on the list of affiliated agents.

*Note: Applications completed and approved online should not be mailed to MDRT.*

**If an applicant qualifies for Court of the Table or Top of the Table, can they upgrade their membership at a later time, even if they have already been approved for MDRT-level membership?**

Those who complete an online application may return later to provide additional production information and to upgrade their membership level to Court of the Table or Top of the Table selecting the "Upgrade" action in the online system.

*Note: Applicants who have already sent a paper application being processed at MDRT headquarters must complete the paper process and are not able to use the online application to upgrade their application.*

**Is the online application available in other languages than English?**

Yes, the system is available in Bahasa Indonesia, Japanese, Korean, Simplified Chinese, Spanish, Vietnamese, Thai and Traditional Chinese.

*Note: All entries in the system must be made in English letters only.*

**Where do I go to begin?**

The online application is available at <https://my.mdr.org/directorymember>.

**What device or software do I need to use the online application?**

No special software is needed. Simply click on the link above or enter the address in your internet browser (Chrome, Firefox or Safari), then follow the instructions. Internet Explorer is not recommended.