



## HOW TO SUBMIT BUSINESS OR CONTRACTS THROUGH SECURE EMAIL

### If you have an account:

- ④ Log in to [www.pfsinsurance.com](http://www.pfsinsurance.com)
- ④ Under tools, select **Secure Email**
- ④ At Secure Email screen, Click Here
- ④ If already registered for Secure Email, log in and proceed

### If not already registered:

- ④ Click New to Secure Email - register
- ④ Enter email address and password
- ④ Link will be sent to email address provided to activate account
- ④ Once logged in to the Inbox, click Compose to send a new email
- ④ From the drop down box, (See Page 2 for which option to select)
- ④ Add subject line (i.e. client's name/carrier/product)
- ④ Add attachment (i.e. enrollment form, application, or contracts)
- ④ Add any notes in the body of the email
- ④ Click Send at the top of the screen

# IF YOU ARE SENDING:

## USE:

**ENROLLMENTS /  
NEW BUSINESS -**

**HEALTH SUPPORT -**

**LIFE NEW BUSINESS -**

**LIFE SALES -**

**SALES -**

**LICENSING -**

**COMMISSIONS -**

## FOR:

**Medicare Supplement / Medicare Advantage /  
Part D, Ancillary Health**

**All correspondence related to Medicare  
Supplement, Medicare Advantage, Part D,  
Ancillary Health**

**All Life New Business Products, Long Term  
and Short Term Care, Annuity**

**All correspondence related to Life, LTC, STC,  
and Annuity**

**Any sales items that have any HIPPA or  
personal related information**

**All Licensing and Contracting**

**All commission requests or inquiries that  
contain HIPPA information**