

DocuBank SAFE: Store All Files Electronically

What is DocuBank SAFE?

An optional, free feature of your DocuBank Membership. You can store important files that you would like to have access to from the web, such as your:

- Living Trust/Will
- Financial Documents
- Insurance Policies
- Power of Attorney
- Deeds/Real Estate Documents
- Personal Documents

Features of your DocuBank SAFE

- **Free** for up to **1 GB** of online storage. More storage may be available for purchase.
- Easy, private process for loading documents. Upload them directly from your own computer using the step-by-step instructions on the website. **Do not** fax, email, or send hard copies of your SAFE files to DocuBank for storage in your SAFE account.
- Convenient, designated categories for organizing your documents.
- Files must be in **.PDF format**.
- If you have updated your **Healthcare Directives (e.g. living will, health care power of attorney): you must send healthcare directives SEPARATELY to DocuBank via fax, email, or hard copy** in order to make them accessible with your DocuBank Emergency Wallet Card. If you only store them in your DocuBank SAFE, they will not be available with your wallet card.
- If you choose not to renew your DocuBank membership, your DocuBank SAFE will be deactivated and your files will be deleted approximately 6 months after your membership expires.



How to Open your DocuBank SAFE

1. From docubank.com, login to your DocuBank account with your Member #, PIN and Personal Password (or use the email login with your email and personal password).
2. On the lower left of the screen, click the tab marked **“My DocuBank SAFE.”**
3. A screen will pop up asking you to accept the DocuBank Terms of Use. Please read the Terms of Use and decide if you’d like to proceed.
4. You accept the Terms of Use by creating your DocuBank SAFE Password. This password must be 8 characters long and include numbers, letters, and one symbol (not .or *). It should be different from your DocuBank Personal Password. **Note: if you share your SAFE password, this person(s) will have access to everything that is stored in your DocuBank SAFE.**
5. When you have typed your SAFE password into both fields, you will be in your DocuBank SAFE.

How to Add a File to your DocuBank SAFE

Follow the **step-by-step instructions at the top of the SAFE screen**. Or go to the DocuBank SAFE page and click on “Setting Up My SAFE” to see detailed instructions.

What do the Symbols next to your SAFE Files Mean?

-  **File Folder:** This is how you move a file from one category to another.
-  **Trashcan:** To delete a file from your DocuBank SAFE, click on the trash can. Once you delete a file in SAFE, it cannot be recovered through SAFE. Please delete carefully!

Questions? Call DocuBank toll-free at 1-866-DOCUBANK (866-362-8226) 9a-5p Eastern