Returning a Document Request Form

Last Modified on 07/19/2024 4:10 pm EDT

Overview

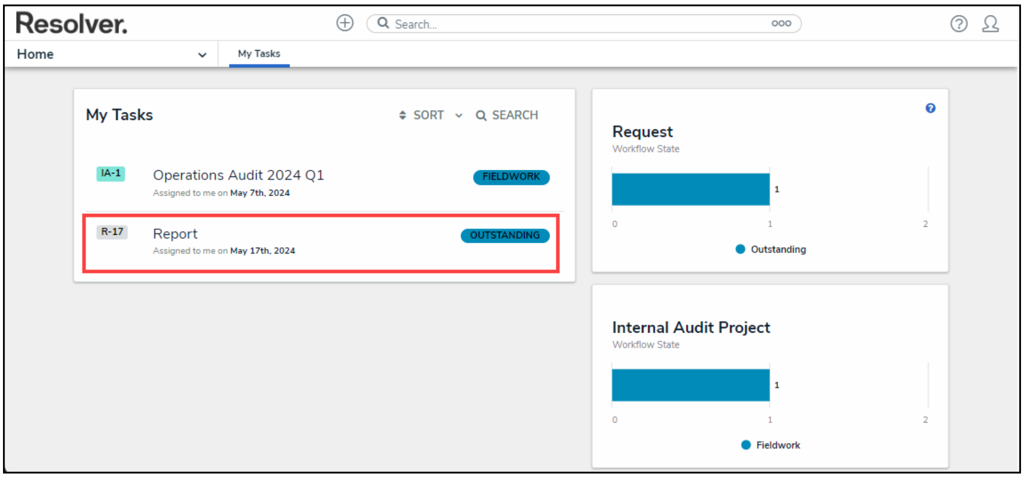
When a document request is sent to an Audit Client, the Audit Client must fill out the request form and return it to the requestor. An Audit Client will find the document request on their **My Tasks** list on their ***Home*** screen.

Related Information/Setup

Please refer to the Opting into Document Management & New UI article for further information on document management.

Navigation

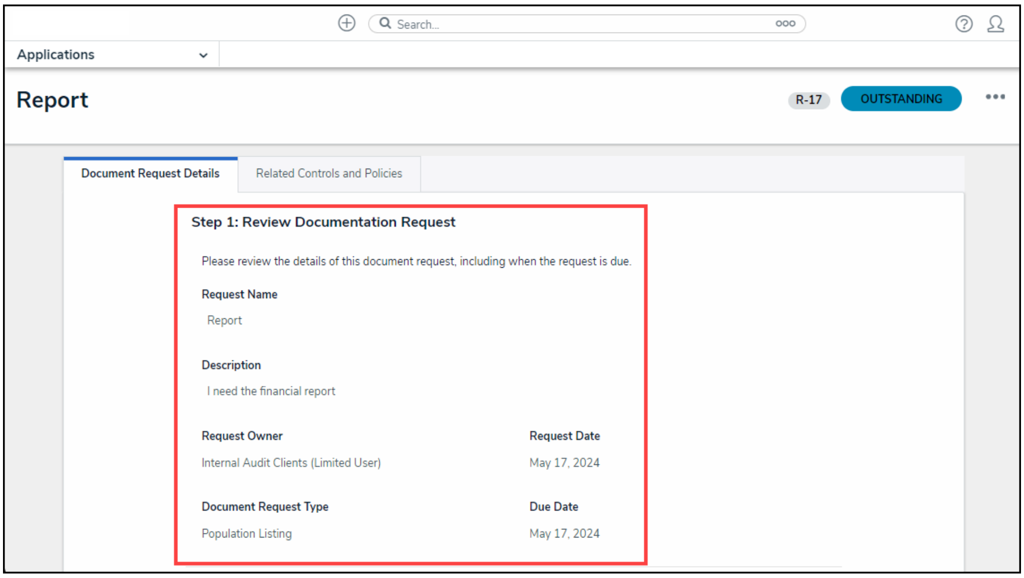
- From the ***Home*** screen, click the **Document Request Form** from on the **My Tasks** list.



Document Request Form

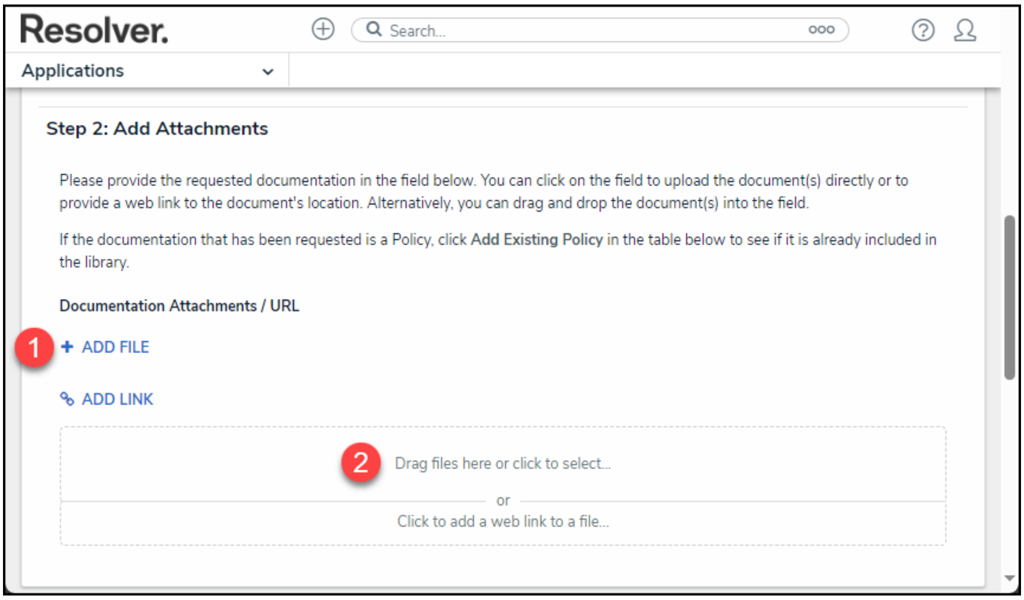
Returning a Document Request Form

1. From the ***Document Request Details*** tab, review the document request information in the ***Step 1: Review Documentation Request*** section. Note the **Due Date** field, as this will indicate when the Document Request is due.



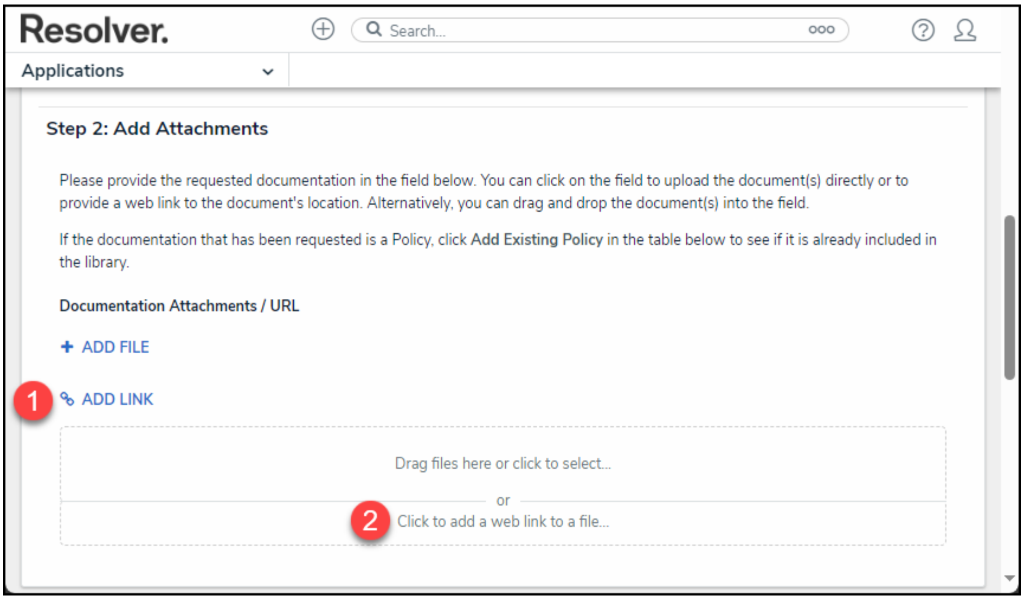
Step 1: Review Documentation Request Section

2. Add any requested documentation to the **Document Attachments/URL** field under the ***Step 2: Add Attachments*** section by dragging and dropping a file in the ***Document Attachments/URL*** field or by clicking the **Add File** link and selecting a file from the connected PC.



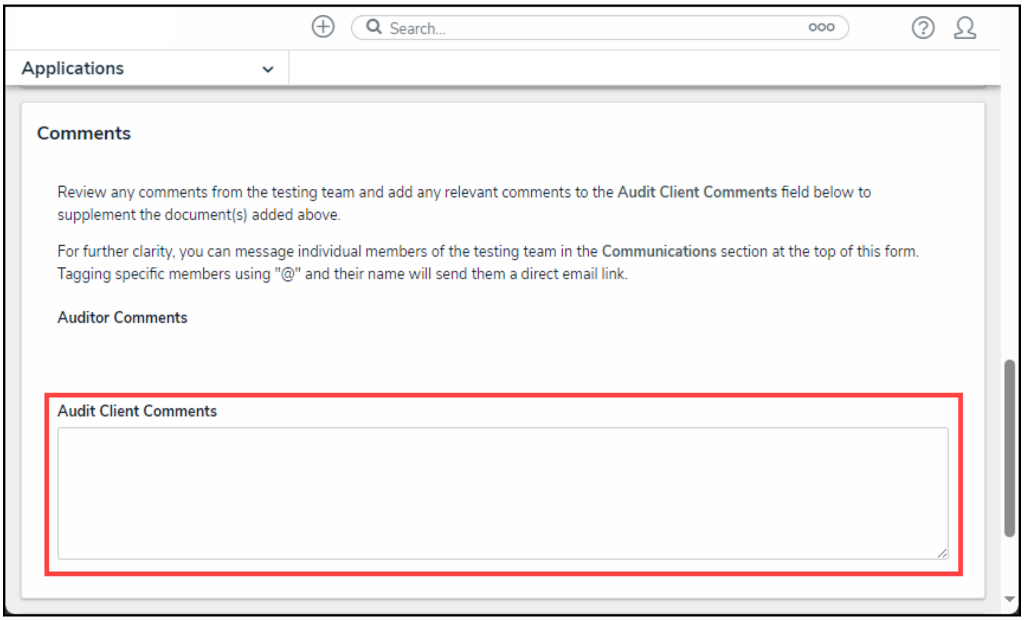
Add File Link/ Drag and Drop File

3. Click the **Add Link** link or click the designated area under the **Documentation Attachments/URL** field to add a web link to the document request.



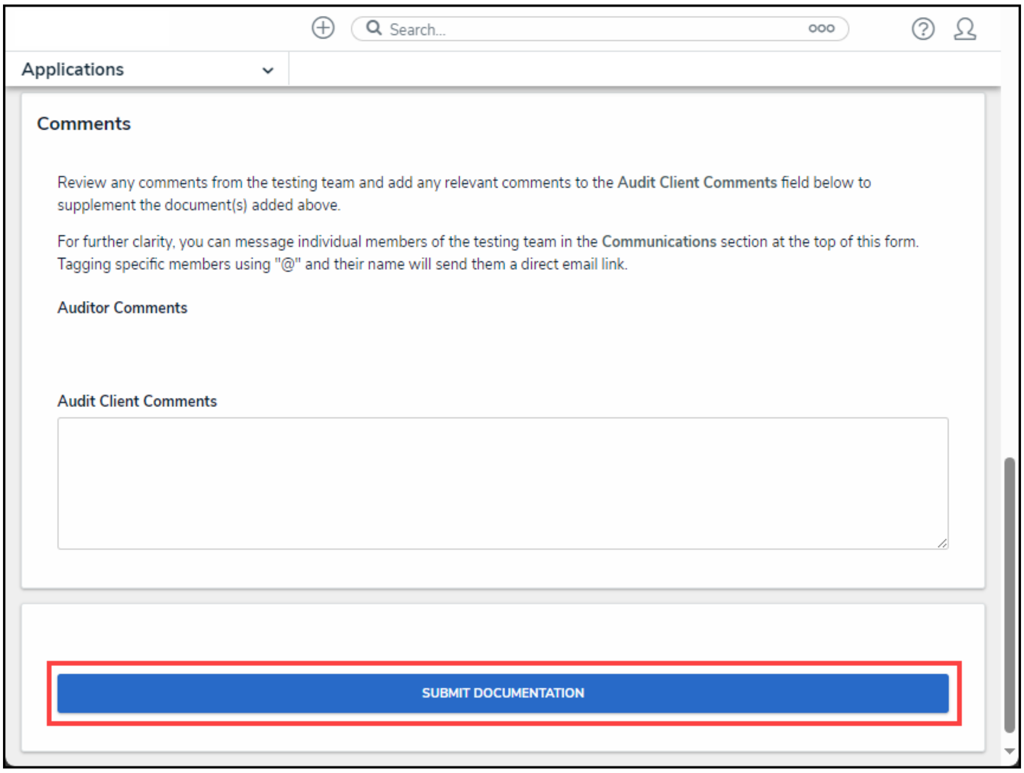
Add Link/Click to Add a Web Link to a File

3. Review any Auditor comments in the ***Comments*** section under the **Auditor Comments** field.
4. Enter any additional information or comments for the auditor in the **Audit Client Comments** field.



Audit Client Comments Field

5. Click the **Submit Document** button to return the document request back to the Auditor.



Submit Document Button