

Returning a Document Request Form

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

Overview

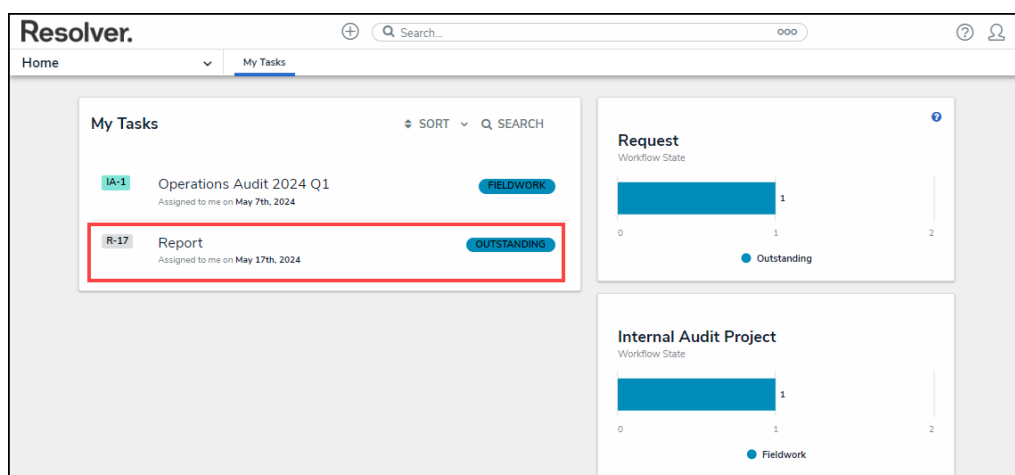
When a document request is sent to an Audit Client, the Audit Client must fill out the request form and return it to the requestor. An Audit Client will find the document request on their **My Tasks** list on their **Home** screen.

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

- 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.

Applications

Report

R-17 OUTSTANDING

Document Request Details Related Controls and Policies

Step 1: Review Documentation Request

Please review the details of this document request, including when the request is due.

Request Name
Report

Description
I need the financial report

Request Owner
Internal Audit Clients (Limited User)

Request Date
May 17, 2024

Document Request Type
Population Listing

Due Date
May 17, 2024

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.

Resolver.

Applications

Step 2: Add Attachments

Please provide the requested documentation in the field below. You can click on the field to upload the document(s) directly or to provide a web link to the document's location. Alternatively, you can drag and drop the document(s) into the field.

If the documentation that has been requested is a Policy, click **Add Existing Policy** in the table below to see if it is already included in the library.

Documentation Attachments / URL

1 + ADD FILE

2 ADD LINK

2 Drag files here or click to select...

or

Click to add a web link to a file...

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.

Resolver. + Search... ?

Applications ▾

Step 2: Add Attachments

Please provide the requested documentation in the field below. You can click on the field to upload the document(s) directly or to provide a web link to the document's location. Alternatively, you can drag and drop the document(s) into the field.

If the documentation that has been requested is a Policy, click **Add Existing Policy** in the table below to see if it is already included in the library.

Documentation Attachments / URL

+ ADD FILE

1 % ADD LINK

Drag files here or click to select...

or

2 Click to add a web link to a file...

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.

Resolver. + Search... ?

Applications ▾

Comments

Review any comments from the testing team and add any relevant comments to the **Audit Client Comments** field below to supplement the document(s) added above.

For further clarity, you can message individual members of the testing team in the **Communications** section at the top of this form. Tagging specific members using "@" and their name will send them a direct email link.

Auditor Comments

Audit Client Comments

Audit Client Comments Field

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

Search...

Applications

Comments

Review any comments from the testing team and add any relevant comments to the **Audit Client Comments** field below to supplement the document(s) added above.

For further clarity, you can message individual members of the testing team in the **Communications** section at the top of this form. Tagging specific members using "@" and their name will send them a direct email link.

Auditor Comments

Audit Client Comments

SUBMIT DOCUMENTATION

Submit Document Button