



How to Add a Supporting Document to an Advice Request, Service Request or Application – Tutorial Video Script

(The process is the same for Advice Requests and Service Requests)

To begin, go to the **Menu** and select **Applications**, depending on which type of form you are working with.

Go to the form you are looking for, open the **Menu** and click **Edit**.

Navigate to the **Supporting Document Section**.

Here you will see a list of all the supporting documents already attached to this form.

Click **Attach document** to attach document.

Use the magnifying glass next to **Document Type** to select the type of document you are attaching.

You can enter a description of the document you are attaching.

You can change upload status of exemption requested in the event you are looking to request an exemption for what would otherwise be a mandatory document.

Click **Save** and **Next**, then click **Attach File**.

Here you can attach a document to the application.

Enter a comment that will be part of the record of attaching the file.

When finished click **Submit** and **Close**.