

## **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.



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Report						R-17	OUTSTANDING	•••
Document Requ	est Details	Related Controls and Policies						
	Step	1: Review Documentation Re	quest		]			
	Please review the details of this document request, including when the request is due.							
	Request Name							
	Report							
	Desc	ription						
	l ne	ed the financial report						
	Pogu	lest Owner		Poquest Date				
	Inter	nal Audit Clients (Limited User)		May 17, 2024				
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	Docu	ment Request Type		Due Date				
	Popu	lation Listing		May 17, 2024				

Step 1: Review Documentation Request Section

 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.

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Step 2: Add Attachmen	ts		
Please provide the requested provide a web link to the doc	documentation in the field below. You can click on the field to upload t ument's location. Alternatively, you can drag and drop the document(s)	he document(s) directly or into the field.	r to
If the documentation that has the library.	been requested is a Policy, click Add Existing Policy in the table below	w to see if it is already incl	uded in
Documentation Attachment	/ URL		
+ ADD FILE			
% ADD LINK			
	Drag files here or click to select		
	Or Or		
	Click to add a web link to a file		

Add File Link/ Drag and Drop File

 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.



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If the documentation tha the library.	it has been	requested is a Policy, click Add Existing Policy in the table be	low to see if it is already includ	led in	
Documentation Attachn	nents / UR	_			
+ ADD FILE					
		Drag files here or click to select			
		or 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.
- Enter any additional information or comments for the auditor in the Audit Client Comments field.

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Comments					
Review any comments from the supplement the document(s) ac	sting team and add any relevant comments to the Audit Client Comments d above.	s field below to			
For further clarity, you can mes Tagging specific members usin	e individual members of the testing team in the Communications section @" and their name will send them a direct email link.	at the top of this f	orm.		
Auditor Comments					
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Audit Client Comments					l
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Audit Client Comments Field

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



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Comments						
Review any comments from supplement the document(s)	testing team and add any relevant comments to the Audit Client Com ded above.	ments field below to				
For further clarity, you can m Tagging specific members us	For further clarity, you can message individual members of the testing team in the <b>Communications</b> section at the top of this form. Tagging specific members using "@" and their name will send them a direct email link.					
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Audit Client Comments						
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Submit Document Button