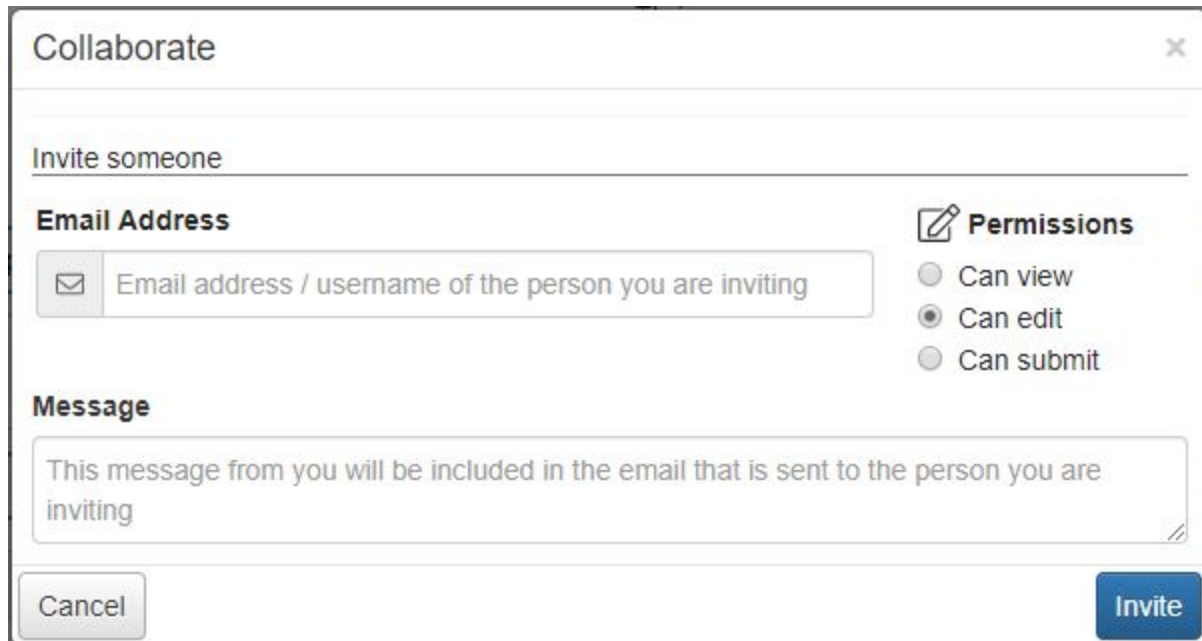


Once you have started a request you will see the Collaborate button at the top of the Request Summary. This can be used to invite other users to work on this request with you.

- From the Collaborate pop up, enter the email address of the person you would like to invite, this can be someone who already has an account in the system, or a new user.
- Set the Permission you would like the collaborator to have, either View, Edit, or Submit.
- And lastly include a message and select Invite.



The screenshot shows a 'Collaborate' dialog box with a close button (X) in the top right corner. Below the title bar, there is a section labeled 'Invite someone'. Under this section, there are three main areas: 'Email Address', 'Permissions', and 'Message'. The 'Email Address' section contains a text input field with a placeholder 'Email address / username of the person you are inviting' and an envelope icon on the left. The 'Permissions' section has a pencil icon and three radio button options: 'Can view', 'Can edit' (which is selected), and 'Can submit'. The 'Message' section contains a text area with a placeholder 'This message from you will be included in the email that is sent to the person you are inviting'. At the bottom of the dialog, there are two buttons: 'Cancel' on the left and 'Invite' on the right.

An email will be sent to the collaborator containing your message, their username, and a link to the logon page. After clicking this link the collaborator will be brought to the logon page. If this is their first time logging into the system, they will be asked to create a password.

After logging into the system, the collaborator will see this request under the Collaboration Requests tab of their Applicant Dashboard. Here they can select the edit form link and start collaborating on the document.

- The Collaborator will have access to all forms within the request
- This includes LOIs, Applications, and all Follow Up Forms that have been assigned to the original applicant.

Key Points

- Once an applicant has started a request they will see the Collaborate button at the top of the Request Summary.
- Collaborators permissions can be set to either View, Edit, or Submit.
- The Collaborator will have access to all forms within the request including Follow Up Forms that have been assigned to the applicant.