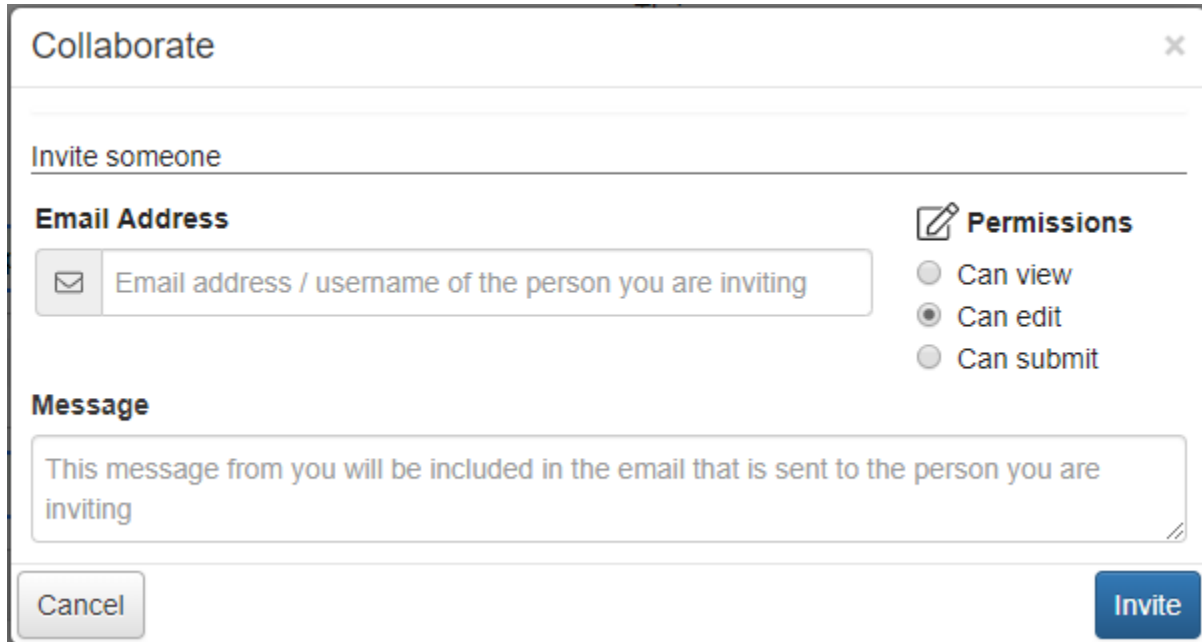


Once you have started an application, you will see the “Collaborate” button at the top of the Request Summary. This can be used to invite other users to work on the application with you.

- 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 titled 'Invite someone' with a horizontal line underneath. The form is divided into three main sections: '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 the title 'Permissions', followed by three radio button options: 'Can view', 'Can edit' (which is selected), and 'Can submit'. The 'Message' section has 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: a grey 'Cancel' button on the left and a blue 'Invite' button 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. They can select the edit form link and start collaborating on the document.

- The Collaborator will have access to all forms within the application

Key Points

- Once an applicant has started an application, 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 application including Follow Up Forms that have been assigned to the applicant.