

Shepherd

ACF OTIP Adult Certification
User Guide for Case Requesters



ADMINISTRATION FOR
CHILDREN & FAMILIES
Office on Trafficking in Persons

Shepherd 1.0 Highlights

- Submit electronic RFCs
- Provide additional information
- Stay updated on the status of the case
- Access signed letters

Impacted Users

- Case Requesters
- Case Approvers
- Case Specialists
- TVAP Service Partners

Shepherd 1.0 modernizes OTIP's Adult Certification process by allowing clients and client advocates to submit electronic Requests for Certification (RFCs) on behalf of foreign national adults who have experienced human trafficking.

Electronic RFC Form

- Protects privacy
- Increases security of information and sensitive case-level data
- Eliminates need to provide PII via email

Faster Case Processing and Consolidated Information

- Streamlined process for reviewing and requesting case information
- All case-related documents and requests in one place
- HHS Certification Letters sent automatically in PDF

Improved Data Analysis

- Efficient data collection increases OTIP's data analysis capabilities for federal reporting and research
- Stronger data interoperability between the Adult Certification process to other federal anti-trafficking processes, including case management referrals to OTIP grantees and notifying victims of eligibility for services

Questions about the RFC process or any other case?
Trafficking@acf.hhs.gov
866-401-5510

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Create an Account

1. Access the **Shepherd Login** page:
Shepherd.otip.acf.hhs.gov.

Shepherd.otip.acf.hhs.gov

2. Select **Submit a Request or Review a Case**.



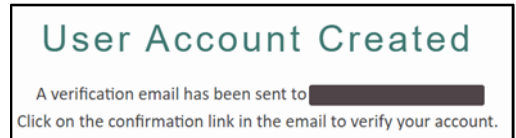
3. Select the **Create Account** link.

4. Enter your information into the **User Account - Create** form.

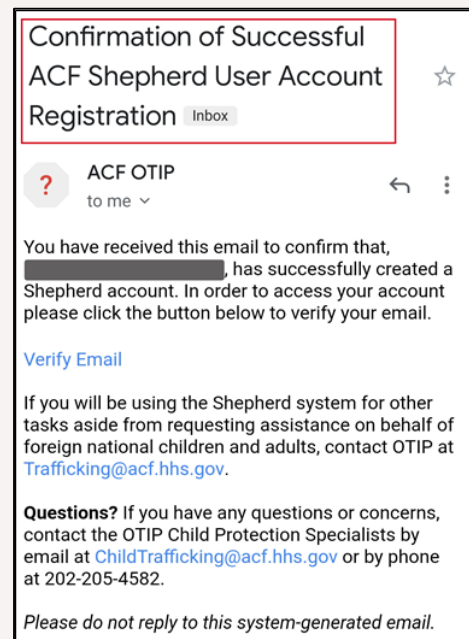
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Create an Account

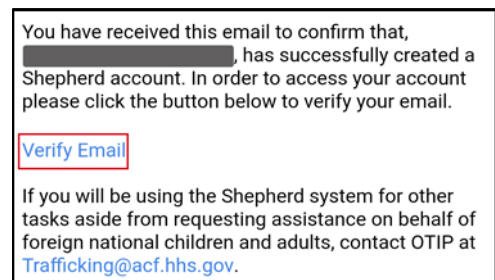
5. You will see the **User Account Created** window.



6. Check your email for a message from **ACF OTIP** with the subject "**Confirmation of Successful ACF Shepherd User Account Registration.**"



7. Select the **Verify Email** link.



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Create an Account

8. You will see the **Verification Successful** window and the **Login** link. Select the **Login** link.

You have successfully created a Shepherd account to request assistance on behalf of foreign national children who may have experienced trafficking or on behalf of foreign national adults who are eligible for HHS Certification.

If you will be using the Shepherd system for other tasks aside from requesting assistance on behalf of foreign national children and adults, contact OTIP at Trafficking@acf.hhs.gov.

Your email address has been verified. Please

[login](#).

Log In

1. Enter your username (your **email address**) and the **password** you entered on the **User Account – Create** form. Select the **Login** button.

Email

✉ Email

Password

🔒 Password

Login

Forgot Password?

Create Account Help

Shepherd System Helpdesk
 ☎ 11-7 6 AM to 9 PM EST
 📞 202-205-4950
 📧 OIG.Service.Desk@acf.hhs.gov

OTIP Child Protection Specialists
 ☎ 11-7 8 AM to 5 PM EST
 📞 202-205-4582
 📧 ChildTrafficking@acf.hhs.gov

OTIP Adult Certification Specialists
 ☎ 11-7 8 AM to 5 PM EST
 📞 866-401-5510
 📧 Trafficking@acf.hhs.gov

National Human Trafficking Hotline
 ☎ 24/7 Toll-free (translation services available)
 📞 1-888-373-7888
 📞 Text 233733
 📧 help@humantraffickinghotline.org

2. After logging in, you will be prompted to enter a **verification code**.

Verify

Code Verification

A verification code was sent to your email. Enter the verification code below.

Submit

3. Check your email for a message from ACF OTIP with the subject **“ACF Application Secure Access Code.”**

Subject: ACF Application Secure Access Code

From: "ACF OTIP"

Your ACF application secure access code is: 559468.

This code is valid for 5 minutes. After the code expires, you will be redirected to enter [redacted] and password again.

Please do not reply to this system-generated email. This email has been automatically generated by request. This electronic transmission is confidential and is intended for designated recipients only; if you have received this message in error, please delete the original and all copies.

4. Enter the code in the **Verify** window and select the **Submit** button.

Verify

Code Verification

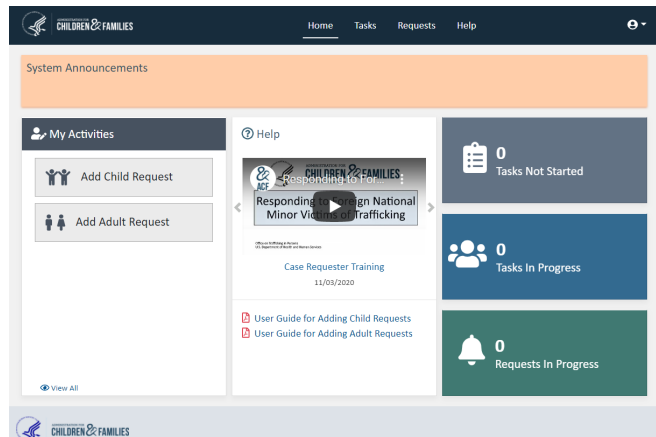
A verification code was sent to your email. Enter the verification code below.

Submit

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 866-401-5510

Log In

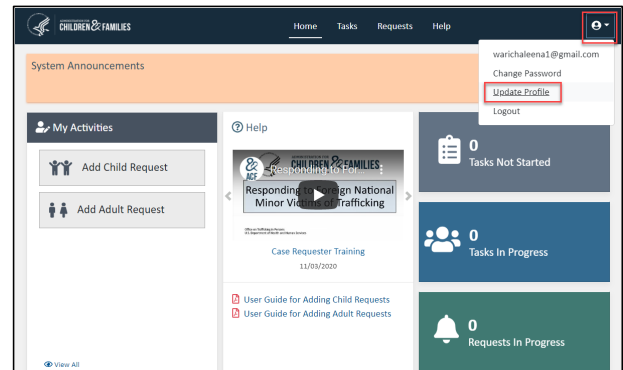
- Once you successfully log in, you will see the **Shepherd Homepage**.



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866-401-5510

Update Profile

1. To update your profile, select the **Profile** icon on the right of the **Top System Navigation** bar and select the **Update Profile** link.

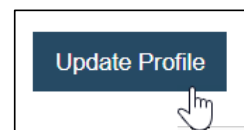


2. Enter your current information.
Note: Email cannot be edited because it is also your username.

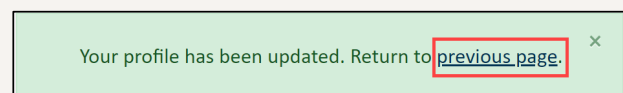
Update External User Profile

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Title	Name of Organization* (If not Organization, enter N/A.)
<input type="text"/>	<input type="text"/>
Address*	City*
<input type="text"/>	<input type="text"/>
State*	Zip Code*
<input type="text" value="Select"/>	<input type="text"/>
Phone Number* (No dashes)	Email*
<input type="text"/>	<input type="text"/>

3. Select **Update Profile** button to save the information.



4. Select the **Previous Page** link from the **Success** banner at the top of the page.



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 866-401-5510

Trouble Logging in?

1. If you fail to log in after three attempts, your account will be locked for **15 minutes**. Select the **Forgot Password** link to reset your password.

Your account has been locked for security reasons. Contact OTP at Trafficking@acf.hhs.gov for assistance with your account.

Email

Password

Login

[Forgot Password?](#)

Create Account Help

Shepherd System Helpdesk
 M-F 9 AM to 5 PM EST
 202-205-4500
 DDCIO.Service.Desk@acf.hhs.gov

OTIP Child Protection Specialists
 M-F 8 AM to 5 PM EST
 202-205-4500
 CHSTrafficking@acf.hhs.gov

OTIP Adult Certification Specialists
 M-F 8 AM to 5 PM EST
 866-401-5510
 Trafficking@acf.hhs.gov

National Human Trafficking Hotline
 24/7 Toll-Free Helpline Services Available
 1-888-373-7888
 Text 233733
 help@humantraffickinghotline.org

2. If your verification code expires, you will receive an error message. Select the **Return to Login page** button to log in again, which will generate a new verification code.

Verify

The verification code you entered is expired. Login again to generate a new verification code.

Code Verification

A verification code was sent to your email. Enter the verification code below.

Return to Login page

3. If you enter wrong verification code, you will receive an error message. If you fail to enter the code after three attempts, select the **Return to Login page** button to log in again, which will generate a new verification code.

Verify

The code you entered is not valid. Try again.

Code Verification

A verification code was sent to your email. Enter the verification code below.

Submit

4. Contact **Trafficking@acf.hhs.gov** or **866-401-5510** for assistance unlocking your account.

Email

Password

Login

[Forgot Password?](#)

Create Account Help

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 DDCIO.Service.Desk@acf.hhs.gov

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Homepage Features

On the **Shepherd Homepage**, you will see:

1. **System Announcements** will display important announcements related to the Shepherd system.
2. Select **Add Adult Request** under **My Activities** to start a new RFC.
3. The **task bar** shows the status of tasks and requests: **Tasks Not Started**, **Tasks in Progress**, and **Requests in Progress**.

The screenshot displays the Shepherd Homepage interface for the Administration for Children & Families. The top navigation bar includes 'Home', 'Tasks', 'Requests', and 'Help'. The main content area is divided into several sections:

- System Announcements:** A red box highlights this section with a red circle containing the number '1'.
- My Activities:** A sidebar menu with two options: 'Add Child Request' and 'Add Adult Request'. The 'Add Adult Request' option is highlighted with a red box and a red circle containing the number '2'.
- Help:** A central section featuring a video player titled 'Responding to Foreign National Minor Victims of Trafficking' and two user guides: 'User Guide for Adding Child Requests' and 'User Guide for Adding Adult Requests'.
- Task Bar:** A vertical sidebar on the right showing three metrics: '0 Tasks Not Started', '0 Tasks In Progress', and '0 Requests In Progress'. The '0 Tasks In Progress' metric is highlighted with a red box and a red circle containing the number '3'.

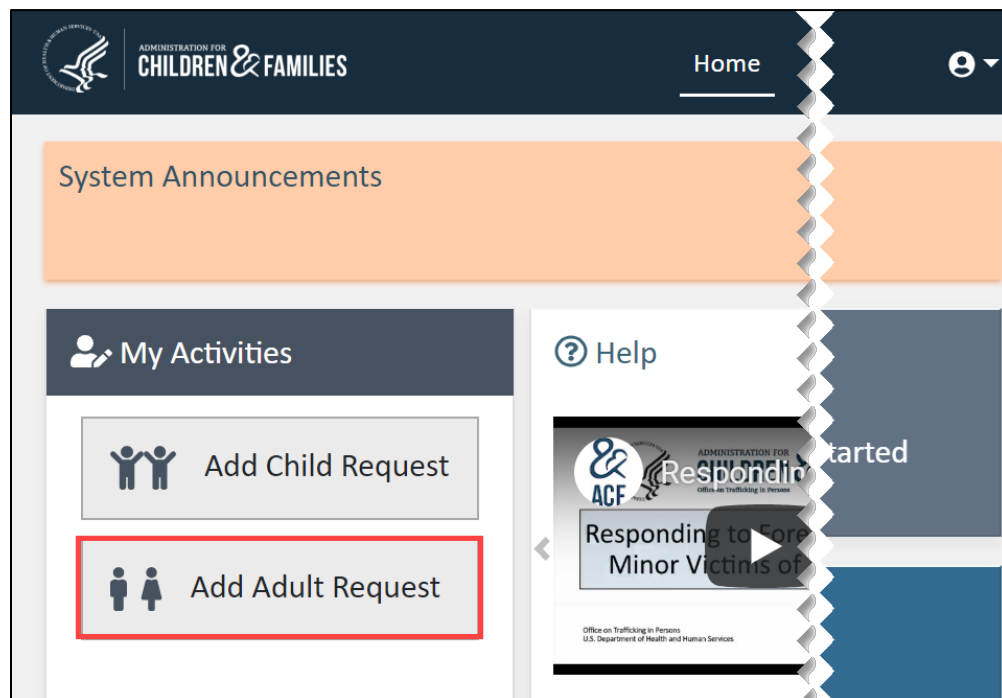
The footer of the page features the Administration for Children & Families logo.

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Completing an RFC

Request for Certification (RFC)

- Start a new RFC by selecting **Add Adult Request** under **My Activities** from the **Shepherd Homepage**.
- Use the **Request for Certification form (RFC)** to request a Certification Letter and/or Case Management services for a foreign national adult who has experienced human trafficking.
- You can submit **New Information** from the Request List page if more information becomes available after the RFC is submitted.



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Completing an RFC

1. The Side Menu links to sections 1 through 5 of the RFC.

The X next to each section will change to a checkmark once you enter all required information and save the RFC. Select **Return to List Page** to return to the **Requests - List page**.

To collapse or expand the side menu, select the arrows in the top right.

2. The Action Header banner at the top of each section contains cancel, save, continue, and print buttons. The banner automatically populates the client's A-Number, Initials, and Date of Birth once **Section 2** is completed and saved.**3. The Instructions** link shows instructions on completing the Request for Certification.

The screenshot shows the 'Section 1 - Requester's Information' form. The side menu on the left is highlighted with a red box and a '1'. The header area, which includes the request number (R0000335), A-Number, Client Initials, and Date of Birth, along with Cancel, Save, Continue, and Print buttons, is highlighted with a red box and a '2'. The 'Resources: Instructions' link is highlighted with a red box and a '3'. The main form area contains fields for Last Name, First Name, Middle Name, Title, Email, Name of Agency/Organization, Address, City, State, Zip Code, Phone Number, and Extension. A 'Return to List Page' button is also visible in the side menu.

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Completing an RFC

Section 1: Requester's information

- The information on this page populates from your profile. You can edit any field on the form (editing the form will not alter the information on your profile).

Note: If you make updates to your profile after you started an RFC, the information from section 1 in your pending RFC will not reflect the changes made. You need to also make the updates in Section 1. Your next RFC will display those changes.

Last Name* N	First Name* Min
Title of Requester	Name of Organization* ? REI Systems
Address of Organization* ? Road	City* Sterling
State* Virginia	Zip Code* 20148
Phone * ? 0000000000	Email* namkoong_min@yahoo.com

- Use the **Tooltip** (question mark icon) to view additional instructions for each field.

Phone * ?

If you do not have a phone number, enter 0000000000.

3. Name of Organization

Note: If you are not affiliated with an organization, enter **N/A**.

Name of Organization* ?

4. Address of Organization

Note: If you are not affiliated with an organization, enter your mailing address.

Address of Organization* ?

5. Phone Number

Note: If you do not have a phone number, enter 0000000000 (ten zeros).

Phone * ?

- Select the **Save and Continue** button at the bottom of the page to move to the next section.

Cancel Save **Save and Continue**

Completing an RFC

Section 1: Requester's information

- You will see **Section 2 – Client's Information** and a **Success Message** letting you know that the information you entered on the previous page was saved.

Section 2 - Client's Information

R00001384 Request Number | A Number | Client Initials | Date of Birth | Cancel | Save | Continue | Print

Resources: Instructions

Fields marked with * are required.

Client's Initials* | Alien Number* (12345678, 123456789)

Country of Origin* | Date of Birth* MM

Sex* | Type Sex Labor Both

Success Form Saved successfully.

Section 2: Client's Information

Documentation(optional)

- This is **not** a required field. However, If you select one or more checkboxes, you **must** upload a supporting document and if you attach a document you **must** select one of the checkboxes.

Note: Individuals can only receive a Certification Letter if they have one of these documents from the Department of Homeland Security that is still valid. You may receive an **Additional Information Request** if we need any further documentation.

Attach one of the following documents if you have a copy:

Individuals can only receive a Certification Letter if they have one of these documents from the Department of Homeland Security that has not been terminated or expired.

Continued Presence that has not been rescinded

Current T-1 Nonimmigrant Status

Bona Fide T-1 Visa that has not been denied

- Drag and drop** or use **Select Files** button to upload.

Note: If you are submitting a signed document, make sure to provide a PDF, JPG, or TIF file of the document. If you attach a document make sure you select a checkbox from the **Documentation** section of the form.

Add Documents (Minimum: 1 - Maximum: 10) (Current attachment count: 0)

Drop or Upload Files

Acceptable Formats: doc, docx, rtf, txt, wpd, pdf, xls, xlsx, msg, jpg, jpeg, tif, xfd, ppt, pptx

Select Files

- Select the **Save and Continue** button at the bottom of the page to move to the next section.

Note: You must select the **Save** or **Save and Continue** button to save the information you entered.

Cancel | Save | Save and Continue

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 866-401-5510

Completing an RFC

- You will see **Section 3 – Case Management Services** and a **Success Message** letting you know that the information you entered on the previous page was saved.

The screenshot shows the 'Section 3- Case Management Services' form. At the top, there is a header bar with fields for Request Number (R00001384), A Number (987898767), Client Initials (ABC), and Date of Birth (03/08/1996). Below this are navigation buttons: Cancel, Save, Continue, and Print. The main content area includes a 'Resources: Instructions' section with a paragraph of text: 'HHS funds trafficking-specific comprehensive case management services for foreign nationals who have experienced trafficking and are seeking HHS Certification, as well as for certain family members. Fields marked with * are required.' Below this is a question: 'Are you requesting trafficking-specific comprehensive case management services at this time?*' with a radio button selected for 'Yes'. A green success message box is overlaid on the bottom right, stating 'Success Form Saved successfully.' with a close button (X).

Section 3: Case Management Services

HHS funds trafficking-specific comprehensive case management services for foreign nationals who have experienced trafficking and are seeking HHS Certification, as well as for certain family members. Fields marked with * are required.

- In Section 3- Case Management Services, indicate whether the client is interested in being connected with trafficking-specific, comprehensive case management services at this time. This a required question. You can submit **New Information** from the **Request List page** if the client wants trafficking-specific comprehensive case management services later.

This screenshot shows the same 'Section 3- Case Management Services' form as above, but without the success message. The question 'Are you requesting trafficking-specific comprehensive case management services at this time?*' is visible with radio buttons for 'Yes' and 'No'. Below the question are three buttons: 'Cancel', 'Save', and 'Save and Continue'.

- Select the Save and Continue button. You will see **Section 4 – Request for Certification Letter** and a **Success Message** letting you know that the information you entered on the previous page was saved.

The screenshot shows the 'Section 4 - Request for Certification Letter' form. The header bar contains the same fields as Section 3. Below the navigation buttons, there is a 'Resources: Instructions' section with the text: 'Fields marked with * are required.' The main question is: 'Are you requesting a Certification Letter at this time?*' with radio buttons for 'Yes' and 'No'. A green success message box is overlaid on the bottom right, stating 'Success Form Saved successfully.' with a close button (X). Below the question, there is a partially visible question: 'Who should receive the hard copy of the letter? E' with a radio button for 'Requester'.

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 866-401-5510

Completing an RFC

Section 4: Request for Certification Letter

1. In **Section 4 – Request for Certification Letter** indicate whether you are requesting a Certification Letter at this time.

You can submit **New Information** from the **Request List page** if the client wants to receive their **Certification Letter** in the future.

2. If you select **No**, skip to step four.
3. If you select **yes**, indicate who should receive the hard copy of the letter. Enter their correct mailing address:

Note: To ensure delivery, **provide a full street address** instead of a P.O. box when possible.

If your address changes during the Request for Certification process, you can submit additional information using the **New Information** feature after submitting the RFC.

Select from the following and provide any missing details:

- **Requester**- Information populates from section 1 of the RFC.
- **Client**- Information populates from section 2 of the RFC.
- **Other**- Enter details for who should receive the letter, such as a Case Manager.

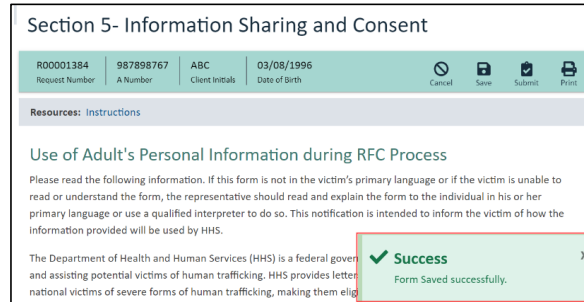
Enter the desired **Benefits Start Date**.

4. Select the **Save and Continue** button to save the information you entered and move to the next page.

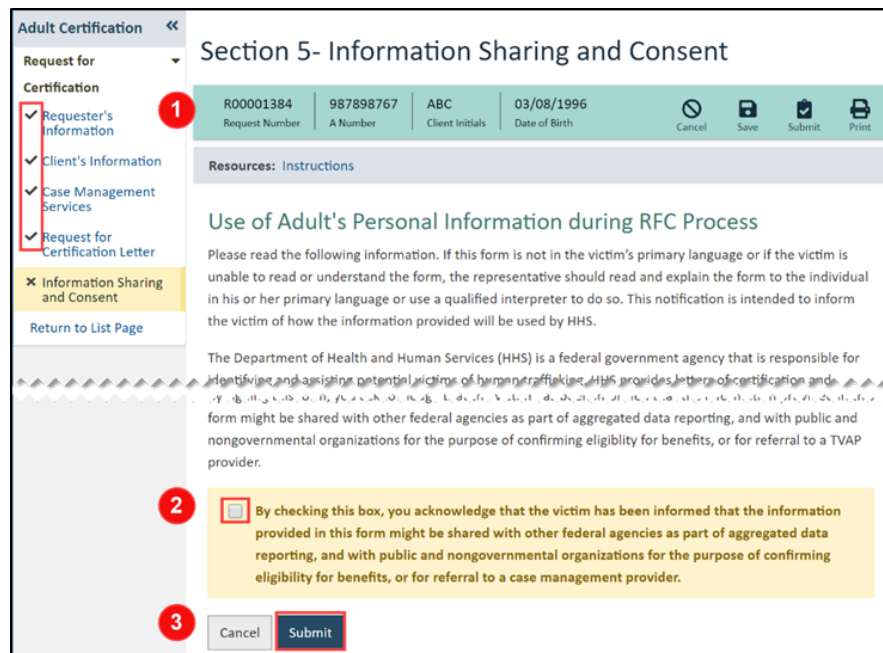
Questions about the RFC process or any other case?
 Trafficking@acf.hhs.gov
 866-401-5510

Completing an RFC

- You will see **Section 5 – Information Sharing and Consent** and a **Success Message** letting you know that the information you entered on the previous page was saved.



Section 5: Information Sharing and Consent

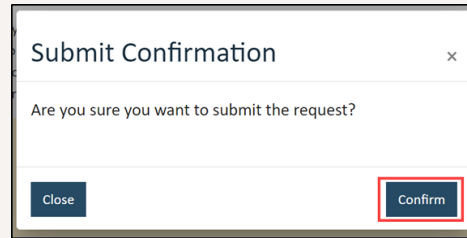


- Verify all sections in the **Side Menu** have a check mark next to them. If you see an **X**, go back to the section, enter all required information, and save.
- Read the information in the **Information Sharing and Consent** section and select the **Confirmation** checkbox.
- Select the **Submit** button to submit the RFC to OTIP.

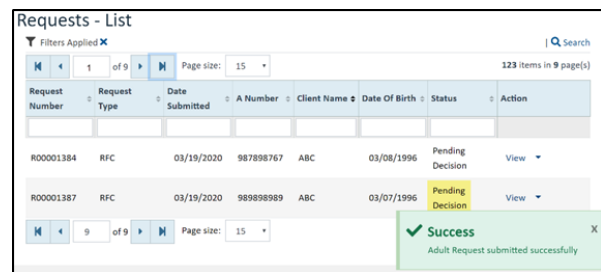
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 866-401-5510

Completing an RFC

- You will see the **Submit Confirmation** overlay.
 Select the **Close** button to go back to **Section 5** of the RFC in progress.
 Select the **Confirm** button to submit the RFC and return to the **Requests - List** page.



- On the **Requests – List** page, you will see a success message.
 The submitted RFC will have the status **Pending Decision**.



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 866-401-5510

RFC status

The **Requests List** page is where you can see the list of requests you have created.

Requests - List

Page size: 15 | 4 items in 1 page(s)

Request Number	Request Type	Date Submitted	A Number	Client Name	Date Of Birth	Status	Action
R00001384	RFC	10/03/2019	987898767	ABC	03/08/1996	Pending Decision	View
R00001387	RFC	09/04/2019	989898989	ABC	03/07/1996	Approved	View
R00001388	RFC	03/19/2020	877778888	CDE	03/05/1999	Denied	View
R00001389	RFC	03/19/2020	987678898	HIJK	03/10/2000	Pending Decision	View

Page size: 15 | 4 items in 1 page(s)

1. To access the Request – List page, select the Requests link from the Top Navigation Bar (A).
2. Search for specific RFC by selecting Search. Select Advanced Search Parameters to search by Date Submitted (B).
3. Sort and filter your RFCs using the sorting arrows and filter fields at the top of each column (C).

The **Requests List** page shows the following statuses for RFCs under the **Status** column:

- **In Progress:** The request is started, but is not submitted to OTIP.
- **Pending Decision:** The request is submitted and under review.
- **Approved:** The letter is signed. You can access the letter from your account.
- **Denied:** A letter was not signed. Reach out to trafficking@acf.hhs.gov or 866-401-5510 to discuss the case.

Questions about the RFC process or any other case?
Trafficking@acf.hhs.gov
 866-401-5510

RFC Status

View your submitted RFC

Request Number	Request Type	Date Submitted	A Number	Client Name	Date Of Birth	Status	Action
R00001384	RFC	10/03/2019	987898767	ABC	03/08/1996	Pending Decision	View
R00001387	RFC	09/04/2019	989898989	ABC	03/07/1996	Approved	View
R00001388	RFC	03/19/2020	877778888	CDE	03/05/1999	Denied	View
R00001389	RFC	03/19/2020	987678898	HIJK	03/10/2000	Pending Decision	View

Page size: 15 4 items in 1 page(s)

1. From the **Requests List** page, find a submitted RFC you would like to view in a **Read-Only** format.
2. Select the **View** link.

Request For Certification - Read Only

R00001387 <small>Request Number</small>	989898989 <small>A Number</small>	ABC <small>Name</small>	03/07/1996 <small>Date of Birth</small>
--	--------------------------------------	----------------------------	--

Section 1 - Requester's Information

that their information will be used in federal reports or data that is available to the public in a way that does not disclose personally identifiable information and is generally reported in aggregate data.

By signing this form, you acknowledge that the victim has been informed that the information provided in this form might be shared with other federal agencies as part of aggregated data reporting, and with public and nongovernmental organizations for the purpose of confirming eligibility for benefits, or for referral to a TVAP provider.

By checking this box, you acknowledge that the victim has been informed that the information provided in this form might be shared with other federal agencies as part of aggregated data reporting, and with public and nongovernmental organizations for the purpose of confirming eligibility for benefits, or for referral to a case management provider.

You see the submitted **Request for Certification– Read-Only** window.
You can see the status of an RFC from the **Requests List** page.

These are the type of **Status**:

- **Approved**: A letter is signed for the client.
- **Denied**: A letter is not signed for the client. Reach out to OTIP to discuss the case.

When a letter is signed, you receive an email letting you know that you can access the letter from your **Shepherd Case Management System** account.

Questions about the RFC process or any other case?
Trafficking@acf.hhs.gov
866-401-5510


View Letters

1. To view the letter, select the **View Letter** link from the drop-down menu next to the **View** link in the **Action** column.

A Number	Client Name	Date Of Birth	Status	Action
12345678	bob	01/12/1995	Approved	View
			In Progress	Action View New Information Add Contacts View Letter
			In Progress	
			In Progress	Edit

2. You can see the signed letter based on the decision made for this case.

Note: The case will remain in your **Requests List page** for 30 days after the letter is signed.



ADMINISTRATION FOR
CHILDREN & FAMILIES
Office on Trafficking in Persons | 330 C Street, S.W., Washington, DC 20201
www.acf.hhs.gov/programs/trafficking

HHS Tracking Number: 00165
DOB: 3/7/1996

ABC
C/O
Care Org
432 Honey Ct NW
Sterling, VA 34567

CERTIFICATION LETTER

Dear ABC:

This letter confirms that we received notice from U.S. Department of Homeland Security that you were subjected to a severe form of trafficking in persons. In accordance with 22 U.S.C. § 7105(b)(1)(E), this HHS Certification Letter

Director
Office on Trafficking in Persons

Benefit-seeking agencies: To verify the validity of this letter, you may call the toll-free HHS Trafficking Victim Verification Line at 1-866-401-5510 during regular business hours.

Questions about the RFC process or any other case?
 Trafficking@acf.hhs.gov
 866-401-5510

Work on In Progress RFC

Find the specific **In Progress** RFC you would like to work on and select **Edit**, in the **Action** column, to complete and submit the RFC.

Request Number	Request Type	Date Submitted	A Number	Client Last Name	Client First Name	Date Of Birth	Status	Action
R00000011	RFA		123456789	B	Brit	01/01/0001	In Progress	Edit

Questions about the RFC process or any other case?
Trafficking@acf.hhs.gov
866-401-5510

Add/ Delete POC to Request

Add/ Delete Additional POC to request

1. From the **Request List page**, select the **drop down arrow** next to the **View** link in the **Action** column for a request in **Pending Decision** status.

Verify the following:

- You see the **View** link
- You see the **Add Contacts** link

Request Number	Request Type	Date Submitted	A Number	Client Name	Date Of Birth	Status	Action
R00001530	RFC					In Progress	Edit
R00001531	RFC					In Progress	Edit
R00002526	RFC					In Progress	Edit
R00001055	RFC	03/04/2020	12345678	aleena	12/13/1995	Pending Decision	View Add Contacts

2. Select the Add Contacts link

Verify the following:

- You see the **Additional Request Contacts** overlay
- You see the **Contact Name** field
- You see the **Email** field

Name	Email	Options
No records found.		
Contact Name	Email	
<input type="text"/>	<input type="text"/>	

Buttons: Add, Cancel

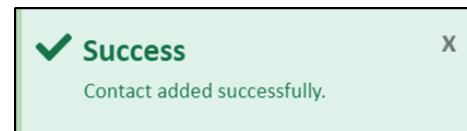
3. Enter the **Contact Name** and **Email** address for an Additional Request POC and select the **Add** button.

Verify the following:

- You see the **success** message
- You see the grid updated with the contact you added

Name	Email	Options
Brittney Spears	Brittney.spears@disney.com	Delete
Contact Name	Email	
<input type="text"/>	<input type="text"/>	

Buttons: Add, Cancel



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Add/ Delete POC to Request

Delete an Additional POC from Request

1. From the **Request List** page, select the **drop down arrow** next to the **View** link in the **Action** column for a request in **Pending Decision** status. Select the **Add Contacts** link.

Requests - List

Filters Applied × Search

Page size: 15 4 items in 1 page(s)

Request Number	Request Type	Date Submitted	A Number	Client Name	Date Of Birth	Status	Action
R00001530	RFC					In Progress	Edit
R00001531	RFC					In Progress	Edit
R00002526	RFC					In Progress	Edit
R00001055	RFC	03/04/2020	12345678	aleena	12/13/1995	Pending Decision	View

Page size: 15

Action: View, New Information, Add Contacts

2. Select the **Delete** link from the **Additional Request Contacts** grid Options column for one of the contacts you added.

Verify the following:

- A. You see the **success** message
- B. You see the grid is updated and the POC you deleted is no longer showing

Additional Request Contacts

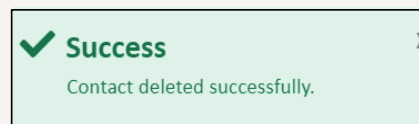
Name	Email	Options
Brittney Spears	Brittney.Spears@disney.com	Delete

Contact Name: Email:

Action: Delete

Add

Cancel



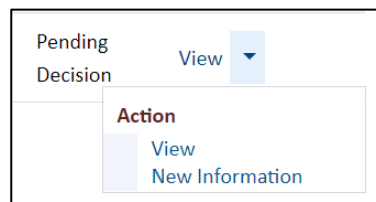
Submitting New Information

Use the New Information feature to update OTIP if:

- The mailing address for the letter has changed
- The main point of contact on the case changes
- Information changes from the submitted RFC like the client would like to request case management services or an HHS Certification Letter

If you already submitted an RFC and need to provide **New Information**, use the **Requests - List** page.

1. In the **Action** column, expand the drop-down next to the **View** link and select **New Information**.



2. Enter the details you want to submit in the **New Additional Information** box and select the confirmation checkbox.
 Select **Submit With Attachments** if you have document(s) to upload.
 Select **Submit Without Attachments** if you do not have document(s) to upload.

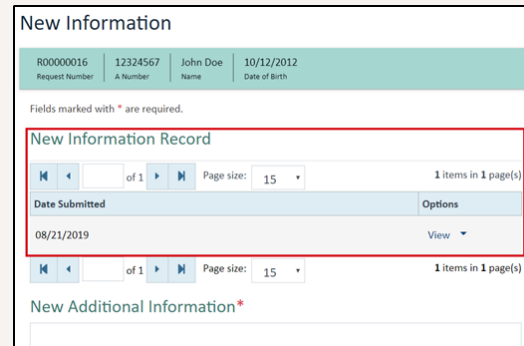
3. If you selected **Submit with Attachments**, you will see the **New Information Details** window.

Drag and Drop or use **Select Files** button to upload and select **Attach and Close**.

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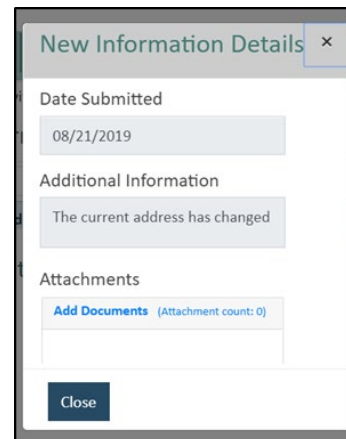
Submitting New Information

- The new information you have submitted will appear as a **New Information Record** on the **New Information** page.



The screenshot shows the 'New Information' page. At the top, there is a header with fields: Request Number (R00000016), A Number (12324567), Name (John Doe), and Date of Birth (10/12/2012). Below this, a note states 'Fields marked with * are required.' A table titled 'New Information Record' is displayed, containing one record with the date '08/21/2019'. The table has columns for 'Date Submitted' and 'Options'. The 'Options' column contains a 'View' link. Below the table, there is a section for 'New Additional Information*' with a text input field.

- Select the **View** link in the **Options** column to see the **New Information** submitted.

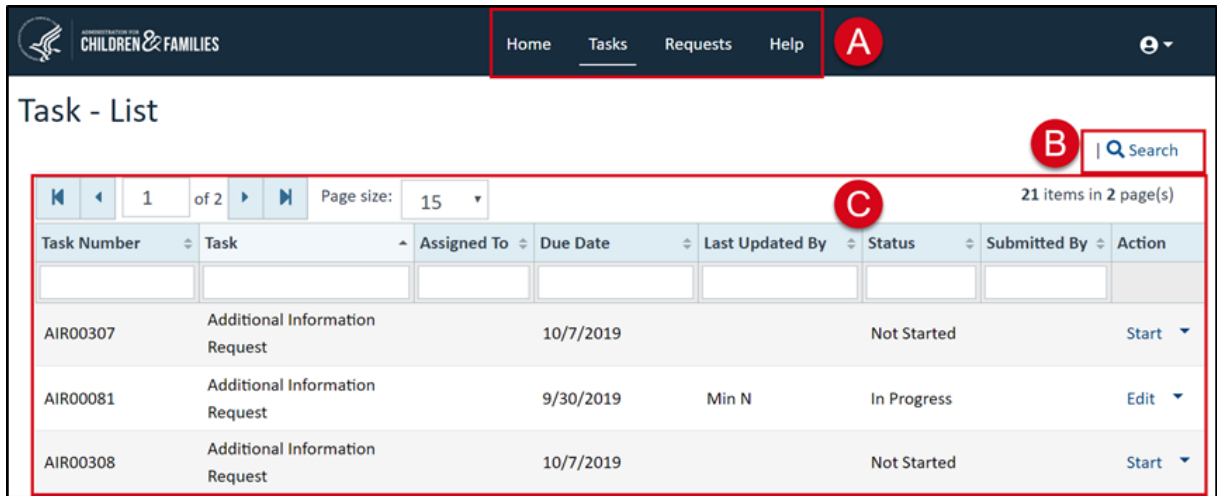


The screenshot shows the 'New Information Details' modal window. It displays the following information:

- Date Submitted:** 08/21/2019
- Additional Information:** The current address has changed
- Attachments:** Add Documents (Attachment count: 0)
- A **Close** button is located at the bottom.

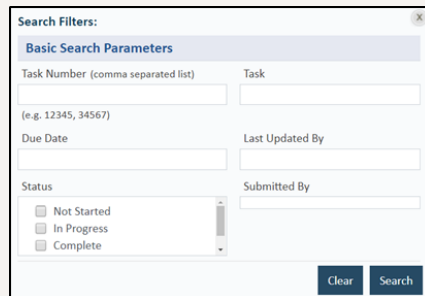
Completing 'Additional Information Request' Task

OTIP might need additional information while processing a submitted RFC.
 If OTIP requests for additional information, you will receive an email.
 You can access the **Additional Information Request** task from the **Task – List** page.

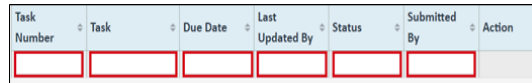


1. To access the **Task - List page**, select the **Tasks** link from the **Top Navigation bar (A)**.

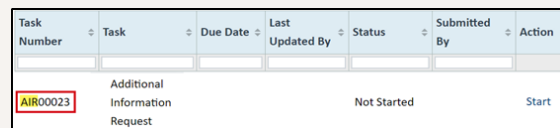
2. Search for a specific task by select **Search (B)**.



3. Sort and filter your Tasks using the sorting arrows and filter fields at the top of each column (C).



4. You can see task numbers under the **Task Number** column (C).



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Submitting 'Additional Information Request' Task

1. Look for the **Additional Information Request (AIR)** task in the **Task** column. All **Additional Information Request** task numbers start with **AIR** followed by a five-digit number.

Task Number	Task	Due Date	Last Updated By	Status	Submitted By	Action
AIR00023	Additional Information Request			Not Started		Start

2. Select the **Start** link in the **Action** column to access an **Additional Information Request** task that is **Not Started**.
Select the **Edit** link to access an **Additional Information Request** task that is **In Progress**.



3. View the **Additional Questions** section of the task to see which information OTIP needs.

Additional Questions

I need more information

4. Enter your answers in the **Answers to Additional Questions** section.

Answers to Additional Questions*

5. **Drag and Drop** or use **Select Files** button if you have any documents you want to upload.

Attachments

Add Documents (Minimum: 0, Maximum: 10) (Current attachment count: 0)

Drop or Upload Files

Acceptable Formats: doc, docx, rtf, txt, wpd, pdf, xls, xlsx, msg, jpg, jpeg, tif, xfd, ppt, pptx

Select Files

6. Select the **Submit** button to send the additional information to the OTIP Case Specialist.

Cancel

Save

Submit

7. You will see the **Submit Additional Information Request** window.

Select **Cancel** to return to the **Additional Information Request** task.

Select **Confirm** to submit the **Additional Information Request** to OTIP and return to the **Task List** page.

Submit Additional Information Request ×

Are you sure you are ready to submit the Additional Information Request?

Cancel
Confirm

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Completing 'Additional Information Request' Task

8. The **Additional Information Request** task status will be Removed from the **Task – List** page.

Task Number	Task	Due Date	Last Updated By	Status	Submitted By	Action
AIR00023	Additional Information Request			Not Started		Start

9. To view completed Tasks, select **"Complete"** in the search panel and click **search**

