Shepherd ACF OTIP Adult Certification User Guide for Case Requesters





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

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Create an Account

1. Access the Shepherd Login page: <u>Shepherd.otip.acf.hhs.gov.</u>

2. Select Submit a Request or Review a Case.

Shepherd.otip.acf.hhs.gov

	Shepherd Case Man	agement System	4
Submit a request or review a	case Verify an HHS	letter Login	as OTIP staff
Je Districtioners Constantion	stave to assummable a disability, contact the Office on Techning in A	ersons by email at TheffelingBacfilds gave at by phone at BB4-493 555	20
Email	ai		
Password 🔒 Pas	sword		Create Account
Forgot Pa	Login ssword?	ATTR Adult FartHerston Consideration	Help National Marcus Youff-Most Motion
M-F 6 AM to 9 PM EST 202-205-4950 OCIO.Service.Desk@acf.hhs.gov	M-F 8 AM to 5 PM EST 202-205-4582 ChildTrefficking@acf.hhs.gov	M-F 8 AM to 5 PM EST 866-401-5510 Trafficking@acf.hhs.gov	24/7 Tol-free (transition territors available) 24/7 Tol-free (transition territors Availa 1-888-737-7888 Test 233733 Palod/bummanta/fickinabatione.org

3. Select the Create Account link.

First Name	Last Name
Title	Name of Organization
Address	City
State	Zip Code
Select	•
Phone Number	Emai (Username)
Password	Confirm Password
Security Question	Answer Note: Security question answer is case sensitive.
Select	•

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

 Enter your information into the User Account -Create form.

Create an Account

5. You will see the User Account Created window.

User Account Created

A verification email has been sent to

 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.

Confirmation of Successful	
ACF Shepherd User Account	
Registration Inbox	
? ACF OTIP to me ~	ר :
You have received this email to confirm that, has successfully cre Shepherd account. In order to access your acc please click the button below to verify your em	ated a count nail.
Verify Email	
If you will be using the Shepherd system for or tasks aside from requesting assistance on be foreign national children and adults, contact C Trafficking@acf.hhs.gov.	ther half of)TIP at
Questions? If you have any questions or conc contact the OTIP Child Protection Specialists email at ChildTrafficking@acf.hhs.gov or by pl at 202-205-4582.	erns, by hone
Please do not reply to this system-generated er	nail.

You have received this email to confirm that, has successfully created a Shepherd account. In order to access your account please click the button below to verify your email.

Verify Email

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.

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

Log In

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

Email			
8	Email		
Passwo	rd		
A	Password		
	Login		Create Account Help
Forgo	(Password?		
Shepherd System Helpdesk M-F 6 AM to 9 PM IST 202-205-4950 COIO.Service.Desk@acDhb.gov	OTIP Child Protection Specialists O M-F 8 AM to 5 PM (ST € 202-205-4582 ChildTrafficking@acf.hhs.gov	OTIP Adult Certification Specialists O N-F 8 AM to 5 PM (ST U 866-401-5510 Trafficking@ecf.hhs.gov	National Human Trafficking Hotline 24/7 Tol-Here (transator Service Available) 4. 1-88-373-7888 • Text 233723

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 coo below.	e
Submit	
Submit	

 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 a and password again.
Please do not reply to this system-generated email. This email has been notomatically 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.

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



Log In

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



Update Profile

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



Last Name*

Update External User Profile

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

First Name

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.



Trouble Logging in?

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



Verify

A verification code was sent to your email. Enter the

993061

Submit

The code you entered is not valid. Try again

Code Verification

verification code below.

ed for executiv reasons. Contact OTIP at Trafficking/Bact hits.cov for assistance with your account.

automatedexternalact@gmail.com

A Pr



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.



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.



- 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.
- 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.

CHILDREN & FAMILIES	i Home Tasks	Requests Help Or
Adult Certification 《	Section 1 - Requester's Informa	tion
Request for *	section 2queeter e	
Certification	R00000335	2 0 0 0 0
× Requester's Information	Request Number A Number Client initials Date of Birth	Cancel Save Continue Print
× Client's Information	Resources: Instructions	3
× Case Management Services	Enter the requester's information (the client OR the individual	submitting the request on behalf of the client). Fields marked with
× Request for Certification Letter	* are required.	
× Information Sharing and Consent	Last Name*	First Name*
Return to List Page	-maileb-	.slasss.
	Middle Name	Title
	Email*	Name of Agency/Organization*
	Address" O	City"
		- umanite ump.*
	State*	Zip Code"
	Repare	•
	Phone Number* (no dashes) 🛛	Extension
	3	
	Cancel Save Save and Continue	

Section 1: Requester's information

1. 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.

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

3. Name of Organization

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

4. Address of Organization

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

5. Phone Number

Note: If you do not have a phone number, enter 000000000 (ten zeros).

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

Name of Organization* 🕑

Address of Organization* 😧

Phone * 🕑

Save

Cancel

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

Save and Continue

First Name Min Name of Organization* @ **REI Systems**





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

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.

2. 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.

 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.

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





 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.

15					
urea. ; trafficking-specific	comprehensive case	e manageme	ent serv	vices at th	nis
	specific comprehensive g and are seeking HHS (uired. g trafficking-specific	specific comprehensive case management servic a and are seeking HHS Certification, as well as fo uired. g trafficking-specific comprehensive case	specific comprehensive case management services for foreign a and are seeking HHS Certification, as well as for certain fami uired. g trafficking-specific comprehensive case managem	specific comprehensive case management services for foreign national a and are seeking HHS Certification, as well as for certain family memb uired. g trafficking-specific comprehensive case management serv	specific comprehensive case management services for foreign nationals who have a and are seeking HHS Certification, as well as for certain family members. Fields uired. g trafficking-specific comprehensive case management services at th

Section 3- Case Management Services

HHS funds trafficking-specific comprehen

Cancel Save Save and Continue

marked with * are required.

time

Yes

R00001384 987898767 ABC 03/08/1996 🚫 🖬 💮 🖶

ed trafficking and are seeking HHS Certification, as well as for certain family members. Fields

Are you requesting trafficking-specific comprehensive case management services at this

You can submit New Information from the Request List page (see Case Requester user guide) if the client

wants trafficking-specific comprehensive case management services at a later time

ve case management services for foreign nationals who have

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.

2. 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.



Section 4: Request for Certification Letter

 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, provie 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.



🔵 Yes 🔵 No

Who should receive the hard copy of the letter? E Requester Client Other	nter their correct mailing address:*
Address*	City*
State*	Zip Code*
Select •	
Benefits Start Date 🛛	
Select Date	



 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 C	onsent	
R00001384 987898767 ABC 03/08/1996 Request Number A Number Client Initials Date of Birth	Cancel Save Submit	Print
Resources: Instructions		
Use of Adult's Personal Information during R Please read the following information. If this form is not in the victim's pr read or understand the form, the representative should read and explain primary language or use a qualified interpreter to do so. This notification information provided will be used by HHS.	IFC Process imary language or if the victim is unab the form to the individual in his or her is intended to inform the victim of how	le to v the
The Department of Health and Human Services (HHS) is a federal goven and assisting potential victims of human trafficking. HHS provides letter national victims of severe forms of human trafficking, making them elig	Success Form Saved successfully.	>

Section 5: Information Sharing and Consent

Adult Certification 《 Request for ~	Section 5- Information Sharing and Consent
Certification	R000001384 987898767 ABC 03/08/1996 Omega Diagonal Diagonal <thdiagonal< th=""> <thdiagonal< th=""> <thd< td=""></thd<></thdiagonal<></thdiagonal<>
✓ Client's Information	Resources: Instructions
 Case Management Services Request for Certification Letter 	Use of Adult's Personal Information during RFC Process Please read the following information. If this form is not in the victim's primary language or if the victim is
× Information Sharing and Consent	unable to read or understand the form, the representative should read and explain the form to the individual in his or her primary language or use a qualified interpreter to do so. This notification is intended to inform
Return to List Page	the victim of how the information provided will be used by HHS.
********	The Department of Health and Human Services (HHS) is a federal government agency that is responsible for identifying and assisting patential withins of human trafficking. (HBS provides latter of confict and a con- cy dy
2	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.
3	Cancel Submit

1. 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.

- 2. Read the information in the Information Sharing and Consent section and select the Confirmation checkbox.
- **3.** Select the **Submit** button to submit the RFC to OTIP.

4. 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.

Filters Applie	d×						Q Searc
H 4 1	of 9 🕨	Page size:	15 *				123 items in 9 page(s
Request Number	Request Type	Date o Submitted	A Number 0	Client Name 🕏	Date Of Birth o	Status 0	Action
R00001384	RFC	03/19/2020	987898767	ABC	03/08/1996	Pending Decision	View 🝷
R00001387	RFC	03/19/2020	989898989	ABC	03/07/1996	Pending Decision	View 👻
M 4 0	of 9	N Page size:	15 *		~	Success	

RFC status

	S.	CHILL	DRENE	FAMILIES	6					ŀ	lor	me Tasks		Requests H	lelp	A		9	•
F	₹eq	ues	ts	- List													E	Q Sear	ch
	M		1	of 1	•	M	Page size:		15 •]						С	4 iten	ns in 1 page((s)
	Requ Num	uest Iber	\$	Request Type	:	⇔ D Si	ate ubmitted	\$	A Numb	er	\$	Client Name	4	Date Of Birth 💠	Sta	tus	\$ Action		
	R00	001384	1	RFC		:	10/03/2019		987898	767		ABC		03/08/1996	Per De	nding cision	View	•	
	R00	001387	7	RFC			09/04/2019		989898	989		ABC		03/07/1996	Ap	proved	View	•	
	R00	001388	3	RFC			03/19/2020)	877778	888		CDE		03/05/1999	De	nied	View	•	
	R00	001389	Ð	RFC			03/19/2020)	987678	898		ніјк		03/10/2000	Per De	nding cision	View	•	
	M		1	of 1	•	M	Page size:		15 •]							4 iten	ns in 1 page((s)

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

- 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.

RFC Status

View your submitted RFC

Request ÷	Request Type	Date Submitted	A Number 🗘	Client Name 🔅	Date Of Birth \Rightarrow	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	ник	03/10/2000	Pending Decision	View 🔻
H 4 1	of 1 🕨 🕨	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 989898989 ABC 03/07/1996 Request Number A Number Name Date of Birth
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.

Request List Page

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	e ≎ Date Of Birth ≎	Status	 Action
12345678	bob	01/12/1995	Approved	View 🔽
			In Progress	view
			In Progress	New Information Add Contacts <u>View Letter</u>
			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.



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	В	Brit	01/01/0001	In Progress	Edit

Add/ Delete POC to Request

Add/ Delete Additional POC to request

- 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
- 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
- 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

equests -	List						
Filters Applied	of 1 > N	Page size: 15	•				Q Search 4 items in 1 page(s
Request 0 Number	Request Type 🛛	Date o	A Number	© Client Name	o Date Of Birth o	Status	Action
	rfc						
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
H (of1 🕨 🕅	Page size: 15	•			ľ	Action View New Information Add Contacts

Additional Requ	est Contacts			×
Name	Email		Options	
	No reco	ords found.		
Contact Name		Email		
				Add
Cancel				

Additional Reque	est Contacts	3
Name	Email	Options
Brittney Spears	Britney.spears@disney.com	Delete 🔻
Contact Name	Email	
	2	
		• Add
_		
Cancel		



Add/ Delete POC to Request

Delete an Additional POC from Request

 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.

Filters App	plied	×													Q Sear
н 🔹	1	of 1	•	м	Page size:	15	*							4 ite	ems in 1 page
Request Number	¢	Reque	est Tyj	oe o	Date Submitted	0	A Number	¢	Client Name	0	Date Of Birth 👳	Status	¢	Action	
		rfc													
R00001530		RFC										In Progress		Edit	•
R00001531		RFC										In Progress		Edit	-
R00002526		RFC										In Progress		Edit	-
R00001055		RFC			03/04/20	20	12345678		aleena		12/13/1995	Pending Decision		View]-

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

- Canal	Email			Options
Brittney Spears	Britney.Spears@di	sney.com		Delete
ontact Name		Email	Acti	on <u>Delete</u>
				- Add
				G Add
Cancel				
•	Success			х

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.

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

Pending Decision	View	•
А	ction	
	View New Info	rmation

 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.

New Information	
R00001103 000000000 A Namkoong 01/01/2001 Request Number A Number Name Date of Birth	
Fields marked with * are required.	
New Information Record	
Date Submitted	Options
No Records Found	
New Additional Information*	
By checking this box, I confirm I am ready to submit new information for this request	
Cancel Submit With Attachments Submit Without Attachments	

 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.

New Information Details	×
Additional Information	
The current address has changed.	
Attachments	
Add Documents (Minimum: 0 - Maximum: 10) (Current attachment count: 0)	
Crop or Upload Files Acceptable Formats: doc, docx, rtf, txt, wpd, pdf, xls, xlsx, msg, jpg, jpg, tif, xfd, p	əpt, pptx

Submitting New Information

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

R00000016 12324567 John Doe 10/12/2012 Request Number A Number Name Date of Birth	
Fields marked with * are required.	
New Information Record	
of 1 Page size: 15	1 items in 1 page(s
Date Submitted	Options
08/21/2019	View 👻
A of 1 > Page size: 15	1 items in 1 page(s

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



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.

CHILDREN & FAMILIES	Home Tas	ks Requests Help —	• (A)	0 -
Task - List				B Q Search
H I of 2 H Page size	:: 15 *		C	21 items in 2 page(s)
Task Number 🗘 Task	Assigned To 💠 Due Date	Last Updated	d By 💠 Status 🗢	Submitted By
AIR00307 Additional Information Request	10/7/201	9	Not Started	Start 🔻
AIR00081 Additional Information Request	9/30/201	9 Min N	In Progress	Edit 🔻
AIR00308 Additional Information Request	10/7/201	9	Not Started	Start 💌

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

Task Number	Task \$	Due Date 🗘	Last Updated By $\stackrel{\diamond}{\rightarrow}$	Status \$	Submitted By	Action
AIR00023	Additional Information Request			Not Started		Start

Request List Page

Submitting 'Additional Information Request' Task

- 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.
- 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.
- 4. Enter your answers in the Answers to Additional Questions section.
- Drag and Drop or use Select Files button if you have any documents you want to upload.
- Select the Submit button to send the additional information to the OTIP Case Specialist.
- 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.





Additional Questions

Answers to Additional Questions*







Additional Information

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 $^{\diamond}$	Status ≎	Submitted By	Action
AIR00023	Additional Information Request	p		Not Started		Start

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

ch Filters:		
sic Search Parameters		
Number (comma separated fot)	Terk	
12345, 34567)		
Date	Last Lyndared By	
10	Submitted By	
Al Not Started In Progress		