

Partner Access Request for Information Procedure

Summary

The *Request for Information* procedure describes how to respond directly from Partner Access to a Request for Information (RFI) from IMRF.

Types of requests are:

- General Information
- Incomplete document
- Wrongly completed document
- Missing document
- Non-complying document
- Expected document

Procedure

1. Perform one of the following actions to access the Requests for Information screen:
 - In the **Requests for Information** widget on the Dashboard, click **View All**.
 - From the Tool Bar, click the **Message Center** (envelope) icon, and then select **Requests for Information**.
2. View as either **Open** (default view) or **Closed**.
3. Click the specific request type to view the details and expected information on the right side.
4. To view expected information, highlight and click the appropriate type.
 - A. **Answer:** Answering the question is mandatory, but the **Add a file** is optional.
 - B. **Expected Document:** Uploading a file is mandatory, but the **Add note** is optional.
 - C. **Confirmation:** Selecting the **Confirmed** checkbox is mandatory, but entering **Comments** is optional.
5. Click the **Save** button.
 - A message appears confirming that the expected information has been saved.
 - ◆ Select one of the following buttons:
 - **Back to Request:** Click this button to return to the Requests for Information screen.
 - **Next expected information:** Click this button to view the next expected information without having to return to the Requests for Information screen.
6. Click the **Submit** button on the Requests for Information screen when all expected information has been addressed.
 - A window appears confirming the submission of information and providing a summary of the request for information submitted.
 - ◆ Click either the **Cancel** or the **Confirmation** button.
7. If more than one document was requested and only a partial response is submitted, a window appears confirming that the submission is a partial response. Select one of the following buttons:
 - **Cancel:** To answer the remaining expected information.

- **Continue with submission:** To close the RFI. If a document is still needed, a new RFI will need to be created.
 - ◆ Click either the **Cancel** or the **Confirmation** button.

This procedure is complete.