



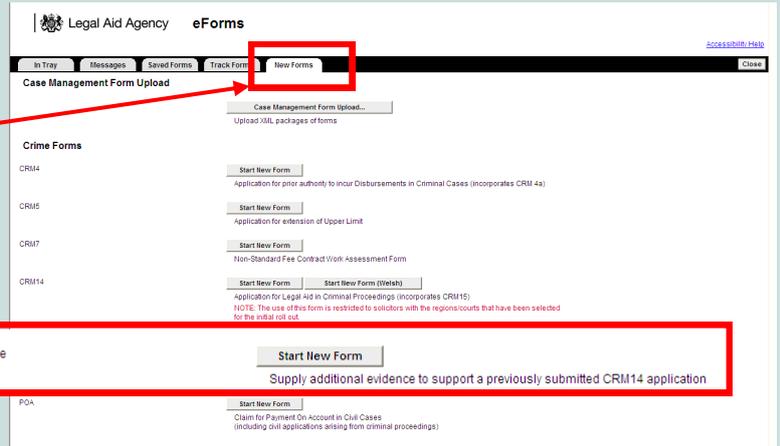
General Notes

- When your application requires evidence at post submission, you will need to follow the process below to attach and submit this evidence.
- **USN** (*Unique Submission Number*) is unique to each form you create and will be needed when submitting **Post Submission Evidence**.
- **20Mb** document attachment limit for the application, and **10Mb** limit for each document attached
- The red **?** help symbol will provide further information where applicable.

1. Post Submission Evidence

Click on **New Forms**

Select **Start New Form – CRM14 Evidence**

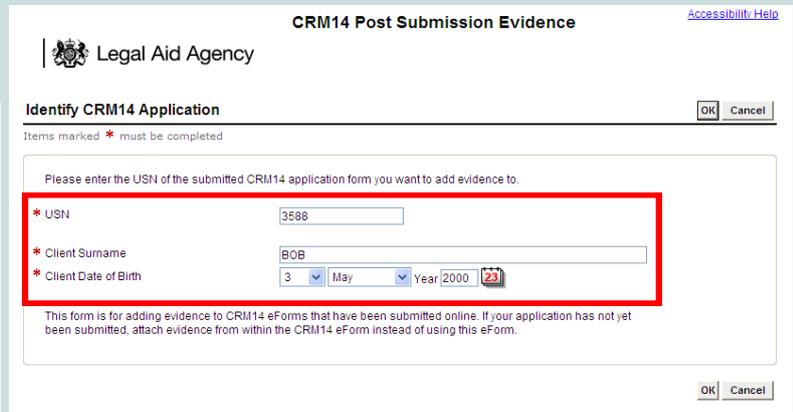


2a. Search for your CRM14 Application

You will need to enter the **USN**, the **Client Name** and the **Client Date of Birth** to search for the **CRM14** application submitted.

Any sections marked with a ***** are mandatory and must be completed.

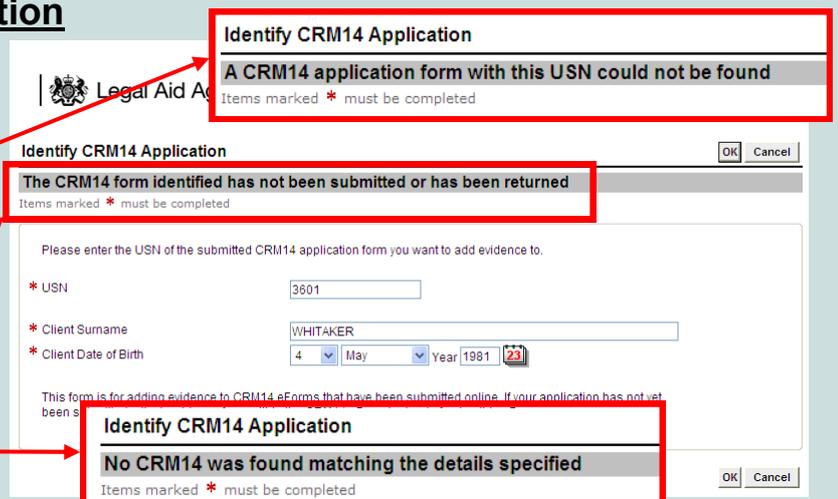
Note: Only use this form for **submitted applications**, otherwise use the evidence attachment option in the **CRM14** - see quick guide.



2b. Search for your CRM14 Application

If the **information** entered to search for a **CRM14** application is incorrect you will get the following error messages:

1. If **USN** incorrect.
2. If Form not Submitted or Returned.
3. If **Surname** or **Date of Birth** incorrect.



3. Attach Evidence Files

You can view a read only version of the submitted CRM14 eform.

Evidence for Submission section contains all types of documents needed to support the information in a case - (*tick the box of each one you want to submit*).

'Click' **Add File Attachment** button.

After browsing and attaching your file you will be asked details of the document attached - see below.

The screenshot shows the 'CRM14 Application for which Evidence is being Submitted' form. The 'Evidence For Submission' section has several checkboxes, with 'Wage slips' and 'Private pension documents' selected. A 'Select file to attach' dialog box is open, showing a file named 'Wdom1\data\sc102PF_A\Home\IP\Grante-FORMS_Info\Private Pension_Documents.pdf' selected. The dialog also indicates that files must not be larger than 10 MB.

4. Attach Evidence Files - Details of evidence

First choose evidence type from list and then enter in Provider Notes - a description of the evidence attached.

Note: A **text field** for each attachment will allow any explanations about the evidence content - **DON'T** use any special or invalid characters ex: **&, /, ', spaces, etc** in the free text field.

The screenshot shows the 'Add / Edit File Attachment' form. The 'Evidence File Details' section is highlighted, showing a dropdown menu for 'Evidence Type' with 'Bank statements' selected. The 'Provider Notes' field contains the text: 'As requested Clients Bank statements for the past 6 months.'

5. Submitting Evidence Files

Once the Evidence file details are complete, the details of the attachment will be shown:

File Name / Size (MB) / Evidence Type / Provider Notes

You will have the option to attach further documents - maximum limit of **20Mb** per application and **10Mb** for each document.

Only the document file types: **pdf, jpg, jpeg, gif, doc, docx, xls, and xlsx**, will be accepted, however **NOT** 'zip' files.

One item of evidence per attachment preferred, but multi-item files, as produced by Scanners will be allowed.

'Click' on **Submit** - you will be notified once the evidence has been considered.

The screenshot shows the 'CRM14 Post Submission Evidence' form. A 'Thank You' message is displayed: 'Thank you for submitting evidence for USN 3588. You will receive a message when the evidence has been considered.' Below the message is a table of attached evidence files:

File Name	Size (MB)	Evidence Type	Provider Notes	Edit	Delete
Bank Statements_3months.pdf	0.82	Bank statements	6 MONTH BANK STATEMENTS	Edit	Delete
Bond Record_2012 GIF	0.16	Bond Record	BOND RECORD 2012	Edit	Delete
WageSlips.docx	0.03	Wage slips	6 MONTH WAGES SLIPS	Edit	Delete
Bond Record_2013.JPG	0.15	Bond Record	BOND RECORD 2013	Edit	Delete
Private Pension Details.xls	0.22	Private pension documents	PRIVATE PENSION DOCUMENTS	Edit	Delete

At the bottom, there is a 'Total attachment size (MB)' field showing 1.37 MB, with a note that the maximum allowed is 20 MB.