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.

Collaborate ✕

Invite someone

Email Address   📝 **Permissions**

✉ Email address / username of the person you are inviting   ○ Can view
                                                                   ● Can edit
                                                                   ○ Can submit

Message

This message from you will be included in the email that is sent to the person you are inviting

Cancel   Invite

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.