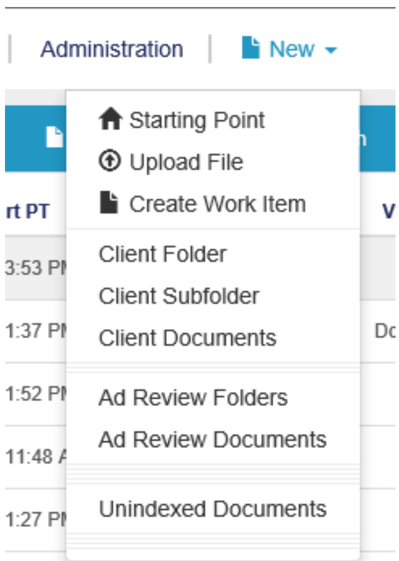
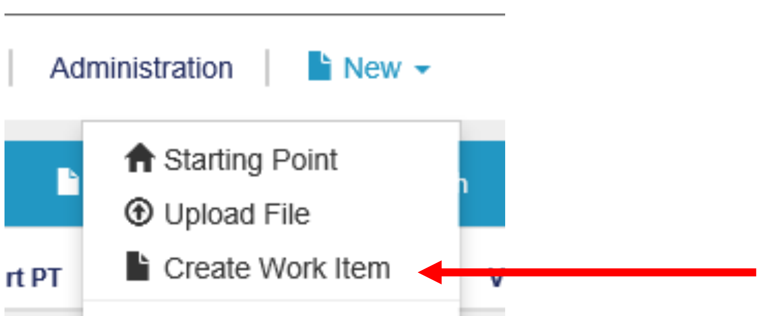
COMET Guide: Submitting Work Items (New Business, Cashiering, etc.)

1. Once you have created the client folders and subfolders, click on the New link:



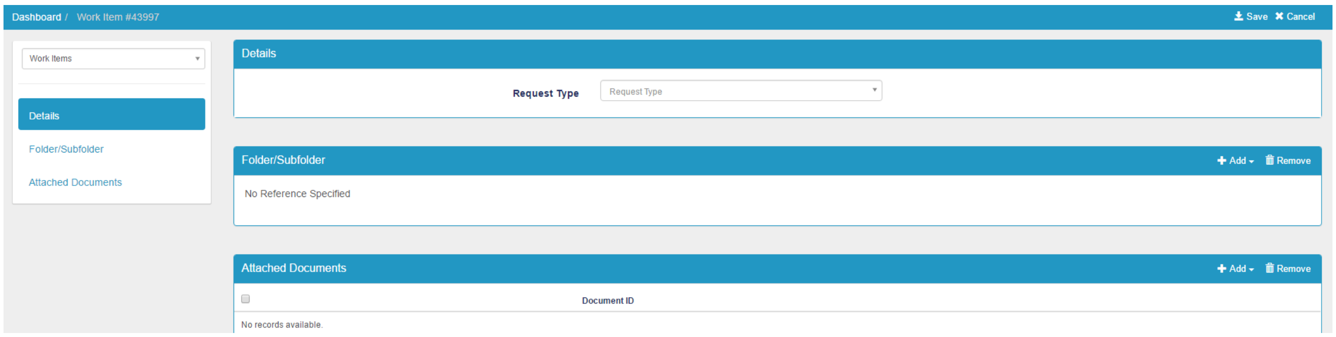
2. Click on Create Work Item



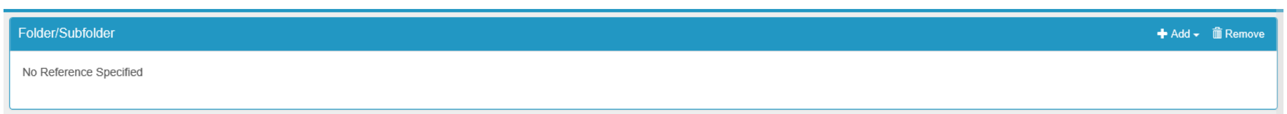
There are three requirements to create a Work Item

- Request Type
- Client Subfolder
- Attached Documents

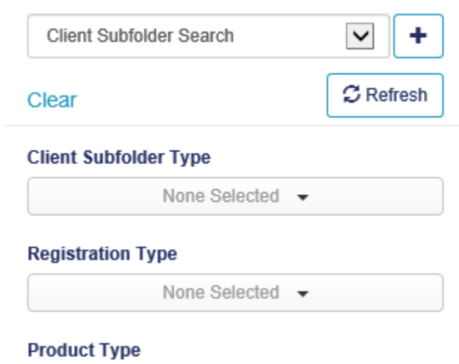
3. This will bring you to the screen to enter in the Work Item details. You will start with the Request Type. The Request Type not only identifies what type of business is being submitted, but also directs the Work Item to the corrects Work Flow.



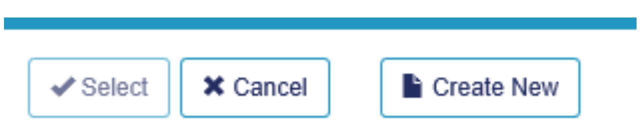
You will also attach the Client Folder/Subfolder in this area. Click on the Add link in the upper right hand corner. You will choose to Add a Client Subfolder.



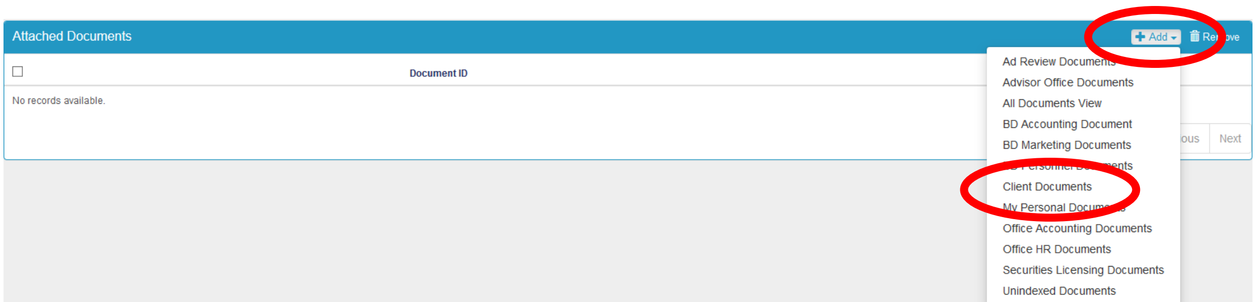
On the next screen you can search for the client by using the search parameters on the left side. The default search is Client Subfolder search but you can also change this to other search parameters by clicking on the drop down. The [Subfolder by Client] search will allow you to search by client last name, first name, SSN.



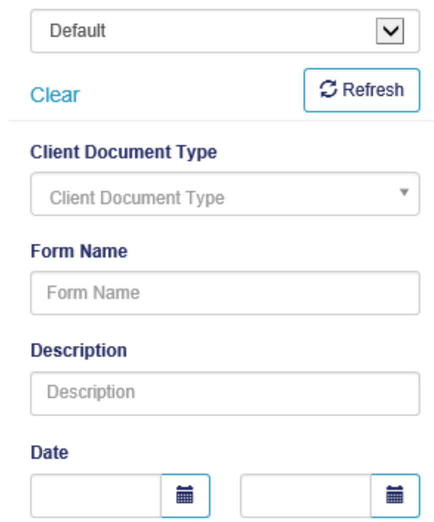
OR create the new Client Folder/Subfolder by clicking the Create New link.



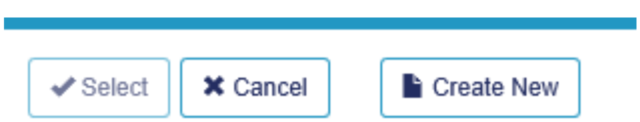
4. Before finishing the Work Item you will want to attach any documents for processing. This is the last step in the Work Item creation. Click on the Add link (Client Documents).



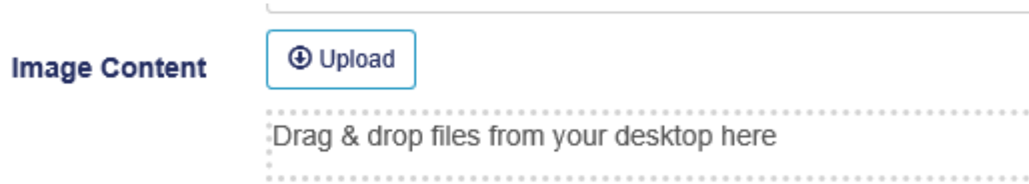
On the next screen you can search for the client document by using the search parameters on the left side. The search you will automatically get is the default where you can search by Document ID. You can change the search by clicking on the drop-down menu. The [Document Search] will allow you to search by client last name, first name, SSN, etc.



OR create the new Client Folder/Subfolder by clicking the Create New link if you have not yet uploaded any documents to COMET.



If you are uploading the document at this time you will need to add in some of the details for the document. Required is the Client Document Type (dropdown menu). You will then scroll down until you see the Image Content option, this button will allow you to upload the scanned document from your computer to COMET.



You will also need to attach the Client Subfolder to the document at this time. The subfolder is the second option on the list of items. Once you click the Add button it will take you to a screen to search for the proper Client Subfolder.

5. Once you have all the proper information click the Save button in the upper right corner of the page. The Work Item will then be moved to Pending Advisor Review. After clicking the “Save” link you will be taken to the Work Item in Pending Advisor Review. If you navigate away from the Work Item in Pending Advisor Review please note you will have to locate it on the Dashboard to click “Send to Back Office”.