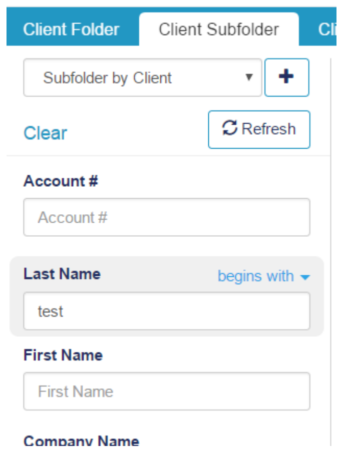
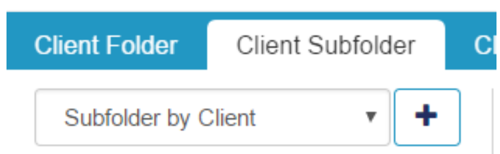
To upload a document, you must have the Client Folder and Subfolder already created in COMET. This guide will walk you through uploading the document after the Subfolder is created. The instructions start by searching for the already created Subfolder.

1. Search for the appropriate client Subfolder by clicking on the Retrieve tab > Client. From the next screen use the search box to find the client.



**Tip: Change the search to read "Subfolder by Client" to search by first name/last name/SSN. This is a dropdown option for the search parameters.

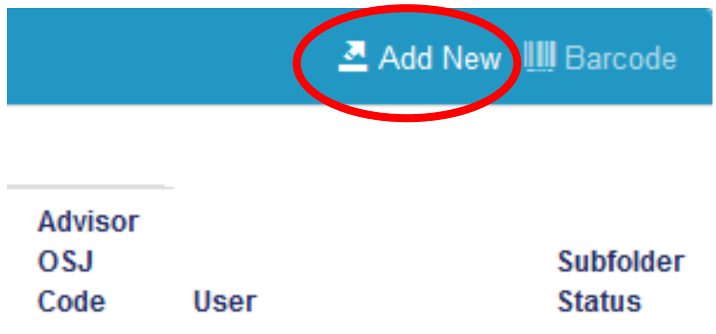


2. Once the search is completed, you will see a list of Subfolders. Hover your mouse cursor over the appropriate Subfolder and click on that Subfolder or click on the check box and then click select.

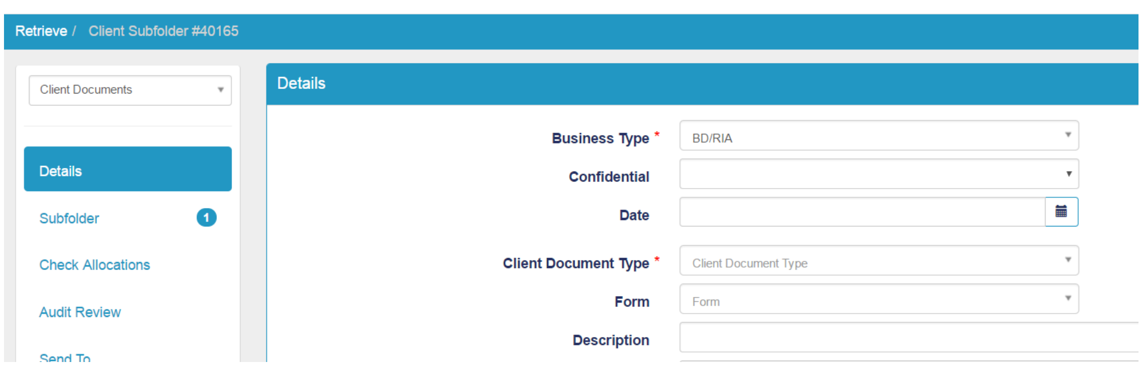
	Registration Type	Client Subfolder Type	Product Type	Vendor/Custodian	Other Description	Account #	Last Note
		Pershing Brokerage	Pershing Brokerage			TG3021411	
		General					
	IRA - Traditional	Pershing Brokerage	Pershing Brokerage	PERSHING			

3. Once you click on the appropriate Subfolder you will see the different levels of organization (client Folder, Subfolder and Document). The dark blue row will indicate what level you are currently editing.

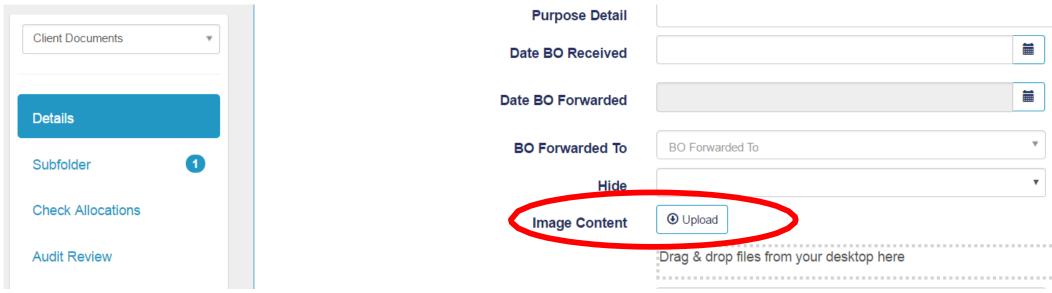
4. At the bottom, you will see Client Documents. If adding additional documents, you will see the “Add New” button. If this is the first, the client documents section will be empty.



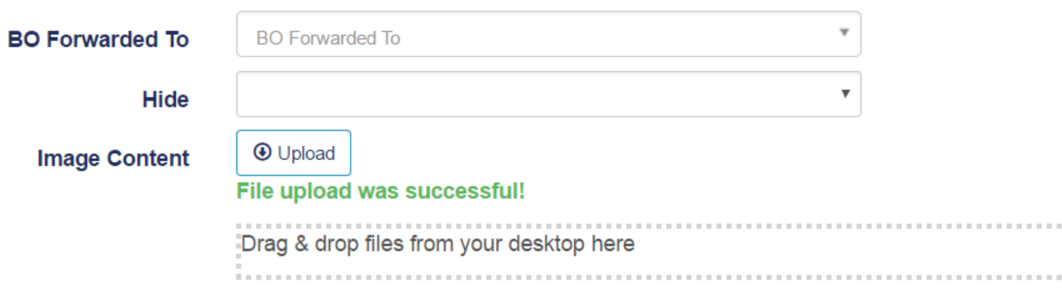
5. Once you click the Add button you will see another screen that will allow you to index and upload the document. You will be required to select a Document Type from the dropdown list, this will be the fourth dropdown from the top. If the document type you are looking for does not appear you can choose “Form” and use the Description box to further detail the document title. It is recommended to always use a description.
Example: Jones TDA IRA APP and Jones CIAA. (This makes searching documents easier in the future.)



6. Scroll down the page until you see the Image Content section, this will be about ¼ of the way down the page.



7. Click the "Upload" button, you will be directed to locate the scanned document on your computer. Click the "Add Files" button and locate the document. After the file is located and you click "Open" you will see the file upload progress. Once uploaded you will be back to the original screen and see the message that the upload was complete.



8. Click on the Save button at the top of the screen to "Save" the indexing and document upload. You will then be directed to a preview of the document. Click "Save and Close" from here and you will be directed to the original screen.