



## NextGen efile Access – Desk Audit Files – Add additional documents to an eFile

STEP 1: To add additional documents to an eFile that is Awaiting Assignment, go to View Results and select the applicable eFile Number. Note: The status must be Awaiting Assignment, otherwise follow the instructions for How to View Status and Upload Corrections

eFile Number	Household N...	eFile Property...	Eff Date of Ce...	Application T...	Unit Number	Status	Last Status U...
1	00960656	Beeman Josh	Preferred View	2020-10-22	Desk Audit eFile	205	Correction Reque... 2020-10-23 18:26 ...
2	00960661	Parker Peter	Preferred View	2020-10-22	Desk Audit eFile	201	Correction Reque... 2020-10-23 18:35 ...
3	00960662	Kent Clark	Preferred View	2020-10-22	Desk Audit eFile	205	Correction Reque... 2020-10-23 18:32 ...
4	00961821	Kent Clark	Preferred View	2020-10-27	New Application	205	Correction Reque... 2020-10-27 17:26 ...
5	00961931	Kent Clark	Preferred Lane	Desk Audit eFile	205	Correction Reque... 2020-10-27 17:54 ...	
6	00963906	King Thomas	Preferred Lane	Desk Audit eFile	205	Correction Reque... 2020-11-03 14:15 ...	
7	00967511	Winfield Jonny	Preferred Lane	Desk Audit eFile	1701	Awaiting Assignm... 2020-11-14 21:36 ...	

### STEP 2: Select Files.

eFile Winfield Jonny

Follow New Note

eFile Number	Property Name	Status
00967511	Preferred Lane	Awaiting Assignment

Refresh Edit Unit Number

Details Chatter

Application Type	Status
Desk Audit eFile	Awaiting Assignment

Household Name (Last First)	Property Name
Winfield Jonny	Preferred Lane

Initially Reviewed by	eFile Owner
	Carrie Odum

Unit Number	Rent -Tenant Paid
1701	

Files (1)

How To Upload Desk Audit Files  
Nov 14, 2020, 04:36 PM

Notes (0)

### STEP 3: Select Upload File.

The screenshot shows the Preferred Compliance Solutions dashboard. At the top, there is a search bar and a user profile for Jane Goodall. Below the navigation menu, the 'Files' section is active, displaying '1 items • Sorted by Last Modified • Updated few seconds ago'. A table lists the file 'How To Upload Desk Audit Files' with a PDF icon and a creation date of 'Nov 14, 2020, 04:36 PM'. The 'Upload Files' button in the top right corner of the Files section is circled in red.

### STEP 4: Add the attachment. Wait for the green checkmark, and then select Next

The screenshot shows a file upload dialog box. At the top, a blue note box contains the text: 'Note: Please don't use following characters in the file name: w, /, \, \'. Below the note, there is an 'Upload Files' button with an upward arrow icon and the text 'Or drop files'.

The screenshot shows the 'Upload Files' dialog box. It displays a file named 'Desk Audit Files- How To View Status a...' with a size of 402 KB. A green checkmark is visible next to the file name, and a red arrow points to it. Below the file list, it says '1 of 1 file uploaded'. The 'Next' button is circled in red.