

Saving a Participant Form to ServiceReef

How to load a required form to ServiceReef

1

Step 1

Access your organization's dashboard

2

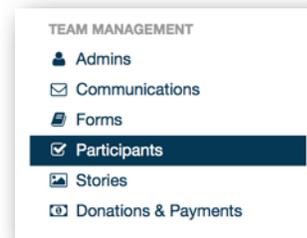
Step 2

Select a specific opportunity

3

Step 3

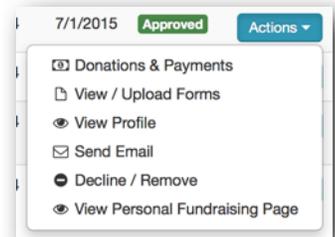
Click "Participants" tab



4

Step 4

Find participant, click "Actions", click "View/Upload Forms"

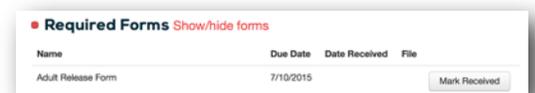


5

Step 5

Click "Mark Received" next to form

NOTE: You must load your forms on the forms tab to reference them here.



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Step 6

Upload form and note the date

NOTE: Don't forget to save!

