

# Mandatory self-verification of Supporting Documents

## Frequently Asked Questions

February 2020

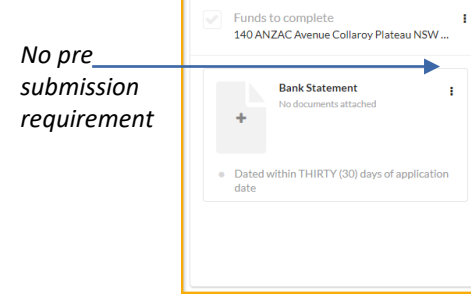
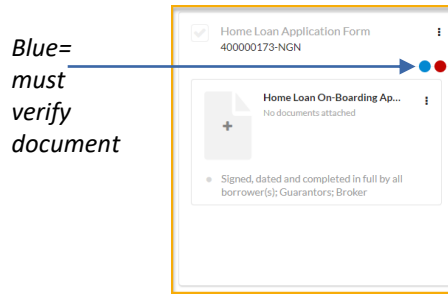
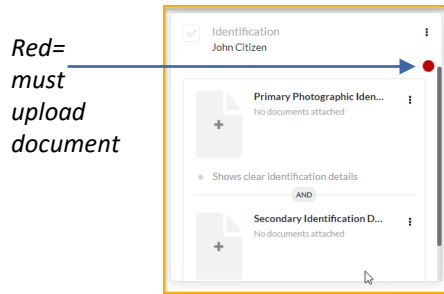
# Contents

1. <a href="#"><u>Is it always mandatory to verify documents prior to submission?</u></a>	3
2. <a href="#"><u>Where do I find instructions on how to correctly upload and verify documents in the supporting docs tab?</u></a>	4
3. <a href="#"><u>How do I search to the new document tab redesign?</u></a>	5
4. <a href="#"><u>Does ApplyOnline keep a record of uploaded and submitted documents?</u></a>	6
5. <a href="#"><u>I'm having issues trying to upload a large file, is this a problem with my computer / internet connection</u></a>	7
6. <a href="#"><u>What are the minimum technical specifications required to run ApplyOnline?</u></a>	8
7. <a href="#"><u>I have uploaded and verified documents correctly, but AMP Bank has not received them. Is there somewhere I can check before escalating?</u></a>	9
8. <a href="#"><u>I have uploaded and verified documents, but AMP Bank has not received all pages, why not?</u></a>	10
9. <a href="#"><u>How do I add additional documents, not requested by AMP Bank, prior to submission?</u></a>	11
10. <a href="#"><u>How do I remove a document I uploaded in error?</u></a>	12
11. <a href="#"><u>How do I redact or highlight part of a document?</u></a>	13
12. <a href="#"><u>If I have already submitted a document an application, how can I resubmit it adding additional documents?</u></a>	14
13. <a href="#"><u>How can I see where my application is up to in ApplyOnline?</u></a>	15
14. <a href="#"><u>Escalation and other sources of help</u></a>	16

# 1. Is it always mandatory to verify documents prior to submission?

Within the newer version of the Supporting Docs service coloured dots indicate whether a document must be uploaded AND / OR self – verified prior to submission.

- Red dot = Document/s must be uploaded to submission checklist item prior to submitting to AMP Bank
- Blue dot = Uploaded document/s must be verified prior to submitting to AMP Bank
- No dots = It is not mandatory to upload or verify document/s relevant to that specific checklist item prior to submission



*Note 1: When it is mandatory to verify, only those documents that have been verified are sent to AMP Bank. Documents uploaded to a condition card but not verified are not received by AMP Bank.*

*Note 2: You may still choose to upload document/s optionally, knowing that while the documents are not mandatory for submission, they will be mandatory for approval. **All document/s uploaded optionally are sent to AMP Bank, even if they have not been verified.***

## 2. Where do I find instructions on how to correctly upload and verify documents in the supporting docs tab?

To access 'How-to' videos for the Supporting Docs service in ApplyOnline undertake the following steps:

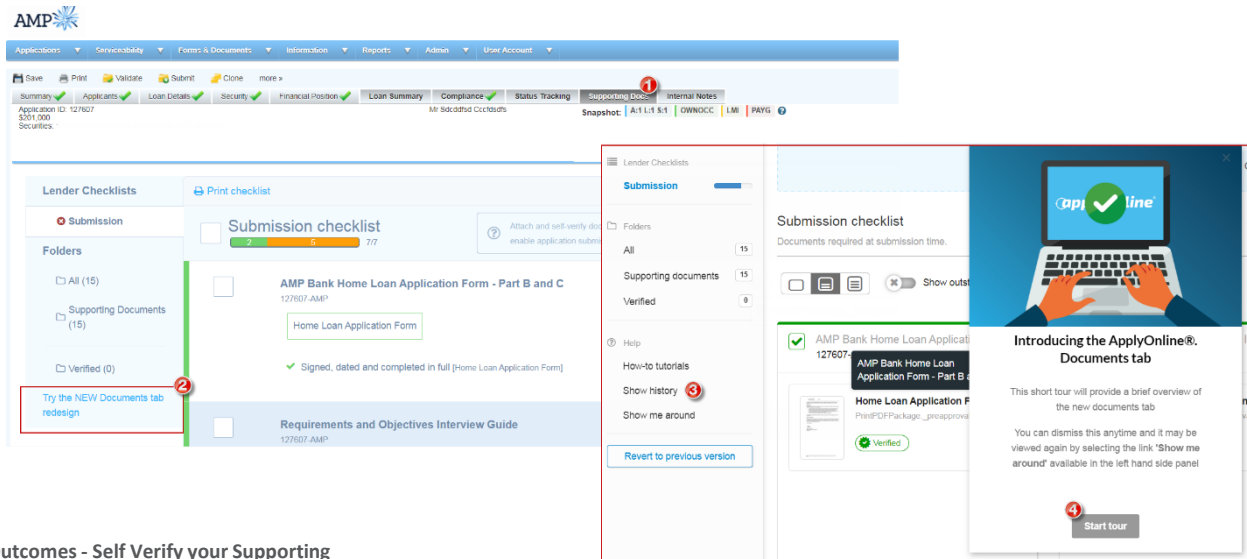
1. Click on Information from the menu bar located at the top of the page
2. Choose "How To videos" from the dropdown list
3. Select video from the available options

The screenshot displays the AMP ApplyOnline web application. At the top, a navigation bar includes tabs for Applications, Serviceability, Forms & Documents, Information, Reports, Admin, and User Account. A red circle with the number '1' highlights the 'Information' tab. Below this, a dropdown menu is open, showing options like 'How To Videos', which is highlighted with a red circle and the number '2'. The main content area shows an 'Application Summary' for Application ID 127607, with details for the loan, applicants, and security. A red box highlights the 'Supporting Documents' section, which contains a list of five video topics. A red circle with the number '3' highlights the first video, 'How to upload and attach documents'. To the right of this list, a video player is shown for the selected video, featuring the 'applyonline by NextGen.Net' logo and the title 'Supporting Documents Service HOW TO UPLOAD AND ATTACH DOCUMENTS'. The video player includes a play button, a progress bar, and a 'vimeo' logo.

### 3. How do I switch to the new document tab redesign?

The latest version of the ApplyOnline Supporting Docs service has a refreshed user interface and improved user experience. To try the new documents tab redesign undertake the following steps:

- Click 'Try the NEW Documents tab redesign' on the left-hand side within the Supporting Docs tab. When the new version launches the first time, you will receive a pop-up on-screen inviting you to take a short tour
- If at any time you wish to return to the previous version, click 'Revert to previous version' on the left-hand side navigation pane and all your work will be retained



## 4. Does ApplyOnline keep a record of uploaded and submitted documents?

All documents uploaded and/or verified to the submission and approval checklists are saved. To view the history of all activities completed within the Supporting Docs tab undertake the following step:

- Click Show History located in the navigation panel located to the left of the screen. The history will display including Date / Time, Who, Where, Activity and Detail.

Date/Time	Who	Where	Activity	Detail
18-Feb-20 02:23 PM	ian_tomlinson@amp.com.au	Submission Checklist PAYG Income (Base) Socdfid Ccctsdtd SAIAR ANDARY	Verify	File Name: PrintPDFPackage_preapproval.pdf, pages 1, as document type: Paylip File Name: as document type: Paylip
18-Feb-20 02:22 PM	ian_tomlinson@amp.com.au	Submission Checklist Requirements And Objectives Interview Guide 127607-AMP	Verify	File Name: PrintPDFPackage_preapproval.pdf, pages 1, as document type: Needs and Objectives Interview Guide
18-Feb-20 02:22 PM	ian_tomlinson@amp.com.au	Submission Checklist AMP Bank Home Loan Application Form Part B And C 127607-AMP	Verify	File Name: PrintPDFPackage_preapproval.pdf, pages 1, as document type: Home Loan Application Form
18-Feb-20 02:20 PM	ian_tomlinson@amp.com.au	Submission Checklist Identification Document Driver's Licence Australian (Ending _XX99yr)	Status Change	Condition changed status from pending to attached

## 5. I'm having issues trying to upload a large file, is this a problem with my computer / internet?

To see acceptable file types and maximum file size limits undertake the following step:

- Click on 'Acceptable files?' hyperlink located at the top right-hand corner of the Supporting Docs tab

*Note: As a rule, upload speeds are generally slower than download speed regardless of internet connection.*

The screenshot displays the AMP application interface. At the top, there's a navigation bar with tabs like Applications, Serviceability, Forms & Documents, Information, Reports, Admin, and User Account. Below this, a toolbar contains icons for Save, Print, Validate, Submit, and Clone. The main content area shows a 'Supporting Docs' tab with a 'Snapshot' section. A modal window titled 'Acceptable file types' is open, providing instructions on how to upload documents and listing supported file formats and maximum file size.

**Acceptable file types**

If you have a paper document, you will need to scan this to your computer or you could take a photograph of it with your camera, smart phone or tablet.

Files must be in one of the below formats and not be password protected, as per the lender's rules.

**We support**

- PDF, DOC, DOCX, RTF, XLS, XLSX, ODT, TXT, JPG, TIF, BMP, GIF, PNG, HTML, XLSM.
- The maximum file size for uploading an individual file is 60mb

## 6. What are the minimum technical specifications required to run ApplyOnline?

- To run ApplyOnline you will require an up-to-date version of Acrobat Reader and one of the following Web Browser versions

the customer's purposes.

If an unsupported browser is used then a message will be displayed to the user advising that a browser version upgrade will be required to proceed.

Web Browser:	Internet Explorer	Google Chrome	Mozilla Firefox	Apple Safari	Microsoft Edge	Opera
	? Unknown Attachment	? Unknown Attachment	? Unknown Attachment	? Unknown Attachment	? Unknown Attachment	
Minimum Version Required:	IE11	57*	45.9.0esr **	9.1.3	20.10240 **	44*
Recommended:	IE11	58*	53.0.3*	10.1	40.15063*	45*

## 7. I have uploaded and verified documents correctly, but AMP Bank has not received them. Is there something I can check before escalating?

The document transfer to AMP Bank is only triggered once a lender reference number is received in ApplyOnline via a backchannel message and the application status has changed to 'Application Received'.

To check status updates and if lender reference number has been received undertake the following steps:

- Click on the Status Tracking tab in ApplyOnline

*Note: Generally, the lender reference number and status update are received within 1-2 minutes of submission, subject to lender gateway availability. If not received within 30 minutes after submission contact your Aggregator Broker Support for escalation.*

AMP Bank ApplyOnline interface showing the Status Tracking tab. The interface includes a navigation bar with tabs like Applications, Serviceability, Forms & Documents, Information, Reports, Admin, and User Account. Below the navigation bar, there are tabs for Summary, Applicants, Loan Details, Security, Financial Position, Loan Summary, Compliance, Status Tracking (highlighted with a red circle 1), Supporting Docs, and Internal Notes. The Status Tracking tab displays a table with columns: Date / Time, Event, Status, Performed By, and Notification. The table shows three rows of data, with the first two rows highlighted by a red box. The first row shows '18-Feb-20 1:54 PM' for 'Electronic Submission' with status 'Electronically Submitted' and performed by 'Ian Tomlinson'. The second row shows '18-Feb-20 1:54 PM' for 'Application- Receipt' with status 'Electronically Submitted' and performed by 'Lender Backchannel'. A red box 2 highlights the 'Lender App Ref: 101084081' field. The AMP logo is visible in the top right corner.

Find more detailed hints and tips on how to find “missing” documents in our [Making Mandatory Self Verification Easy guide](#)

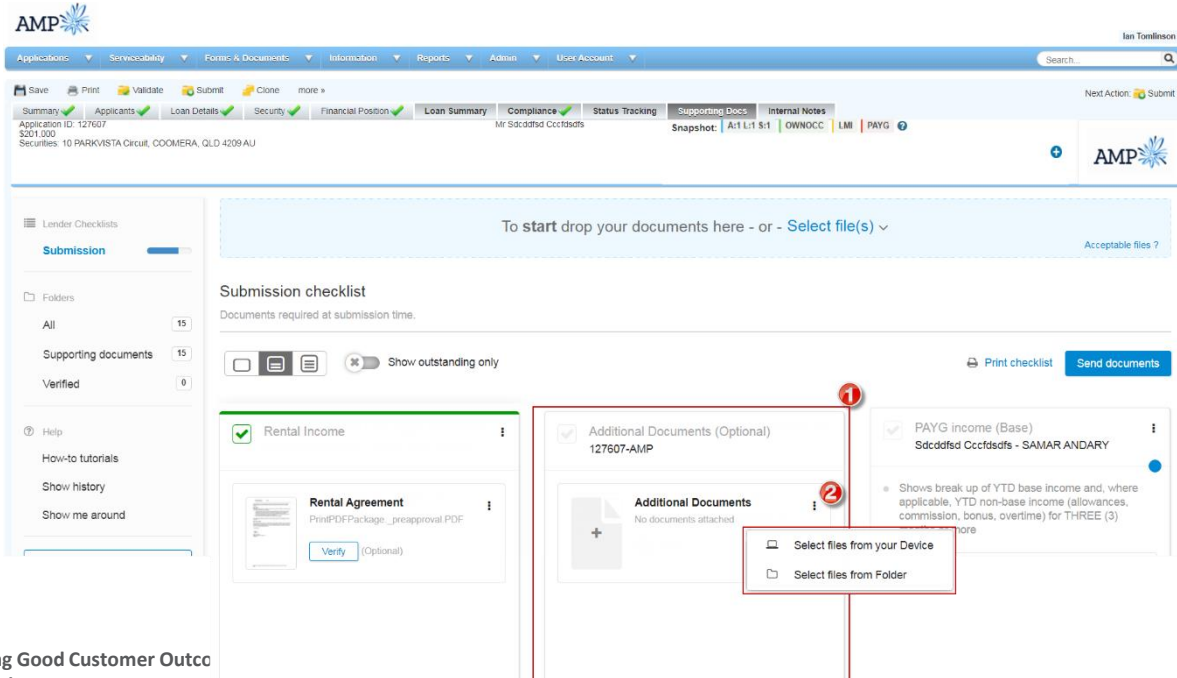
## 8. I have uploaded and verified documents, but AMP Bank has not received all pages, why not?

Where verification is mandatory, only verified documents are sent to AMP Bank. In some examples when docs have “gone missing” it has been due to users uploading documents to a submission checklist item but not all files or relevant pages within a single file were verified.

- Click on the link below to access a video tutorial on verification tips in the supporting docs service in ApplyOnline [Supporting Documents Service – Verification Tips](#)
- Find more detailed hints and tips on how to find “missing” documents in our [Making Mandatory Self Verification Easy guide](#)

## 9. How do I add additional documents, not requested by AMP Bank, prior to submission?

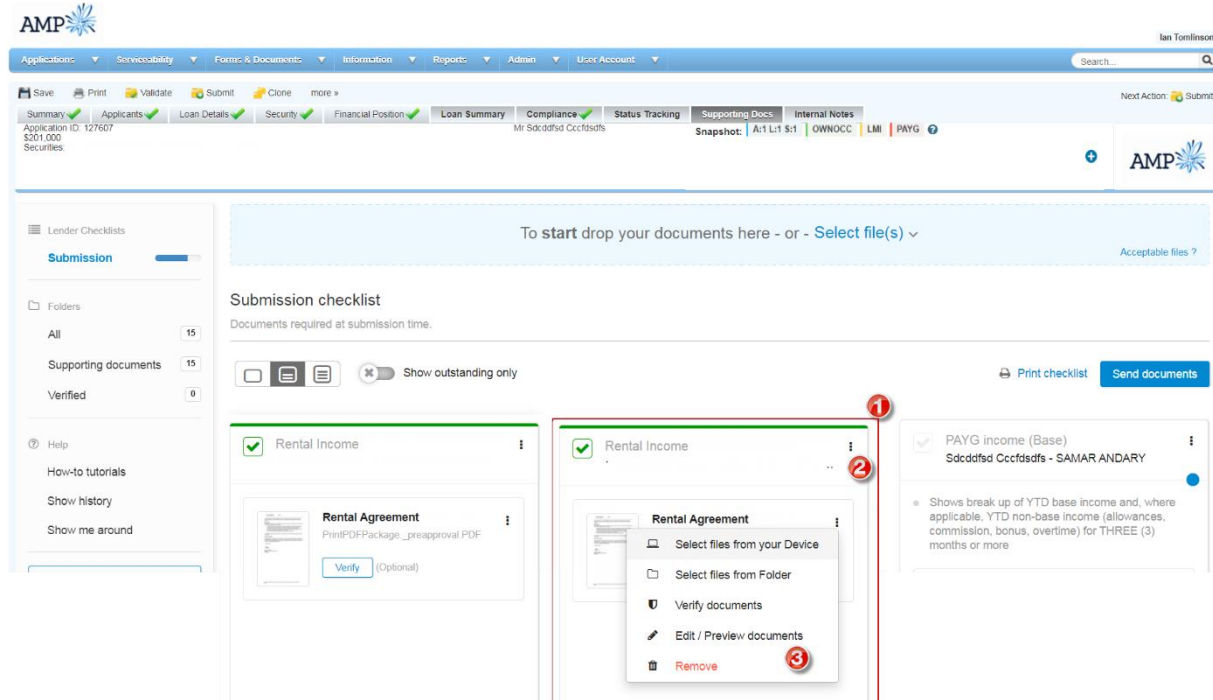
You can add documents, in addition to those requested by AMP Bank, in the Supporting Docs submission checklist by undertaking the steps below:



1. Click on the “+” within the Additional Documents (Optional) card
2. Select file location from dropdown menu
3. Wait while document is uploaded to card

# 10. How do I remove a document I uploaded in error?

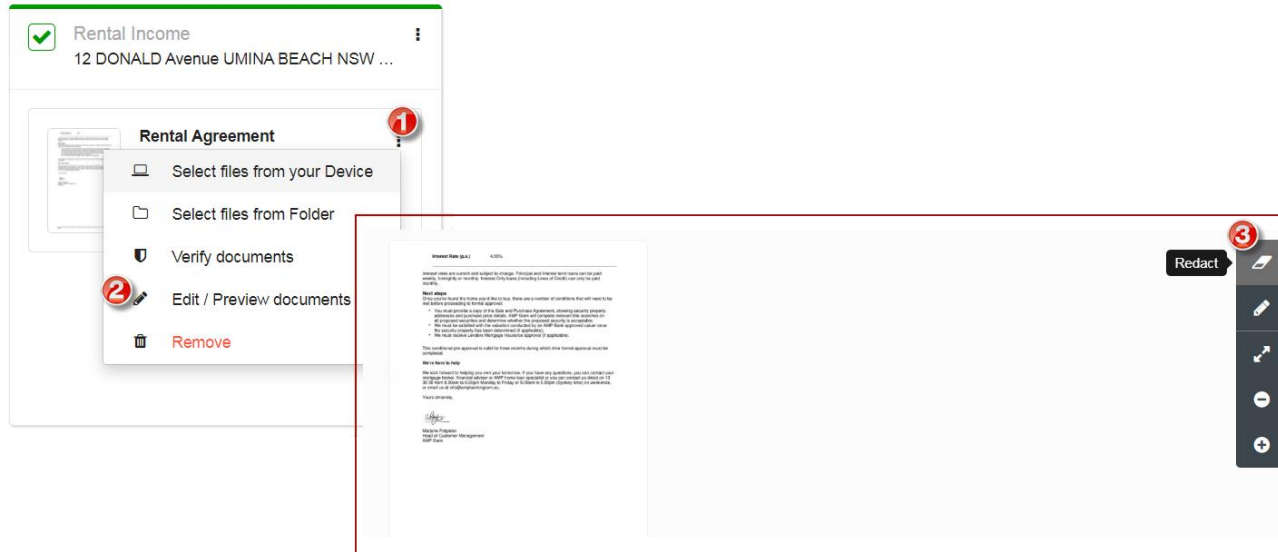
- At any time you can remove a document you have uploaded in error by undertaking the following steps:



1. Click on the Documents card
2. Click on the ellipse in the top right-hand and select Remove
3. Wait while the document is removed from the card

# 11. How do I redact or highlight part of a document?

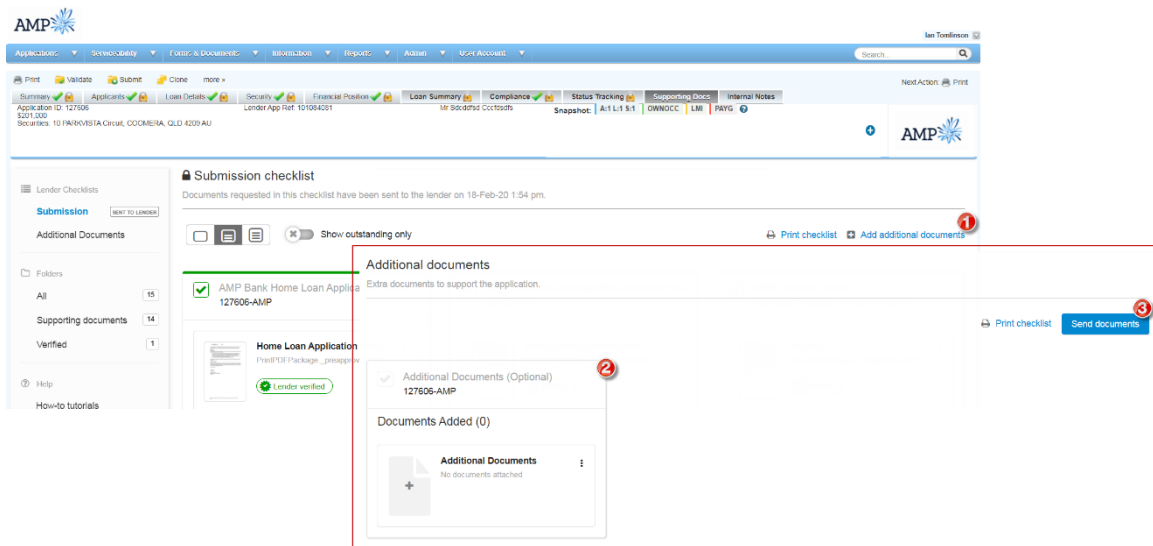
- You can redact or highlight a document by clicking on the ellipse in the top right hand corner of the document card



- Watch this short video tutorial on [How To Edit and Mark Up Documents](#)

## 12. If I have already submitted an application, how can I resubmit it adding additional documents?

- Once a document is submitted you can attach and submit additional documentation to AMP Bank at any time by undertaking the following steps:



1. Click on the “+” on the Documents card
2. Select file location from dropdown menu
3. Wait while document is uploaded to card

# 13. How can I see where my application is up to in ApplyOnline?

The status tracking function within ApplyOnline gives you the ability to see real-time updates from AMP Bank including errors on submission, date and time stamped milestones and backchannel messages.

To access your application status undertake the following steps:

1. Click on the Status Tracking tab within the ApplyOnline application
2. Click on blue triangle next to an event to expand for further information

*Note: status tracking is available for all applications only AFTER your application has been submitted to AMP Bank.*

The screenshot shows the AMP ApplyOnline application status tracking interface. At the top, there is a navigation bar with tabs: Applications, Serviceability, Forms & Documents, Information, Reports, Admin, and User Account. Below this, there is a search bar and a user profile for Ian Tomlinson. The main content area displays various tabs: Summary, Applicants, Loan Details, Security, Financial Position, Loan Summary, Compliance, Status Tracking (highlighted with a red circle and number 1), Supporting Docs, and Internal Notes. The Status Tracking tab is active, showing a table of events. A red box highlights the 'Lender App Ref. 101084061' in the 'Security' tab. Another red box highlights the 'Application- Receipt' event in the 'Status Tracking' tab, which is also highlighted with a red circle and number 2. The table shows the following events:

Date / Time	Event	Status	Performed By	Notification
18-Feb-20 1:54 PM	Electronic Submission	Electronically Submitted	Ian Tomlinson	
18-Feb-20 1:54 PM	Application- Receipt	Electronically Submitted	Lender Backchannel	
18-Feb-20 1:55 PM	Referred	Referred	Lender Backchannel	Email sent to SMS sent to:

# 14. Escalation and other sources of help

## Where else can I find help?

- For more help, in the Supporting Docs tab click 'Help' --> How To Tutorials:

The screenshot shows the ApplyOnline 'How To' Videos page. The left sidebar contains a list of links: 'Lender Checklists', 'Submission' (with a 'SEND TO LENDER' button), 'Additional Documents', 'Folders' (with 'All' and 'Supporting documents' options), 'Help' (with a red box around 'How-to tutorials'), 'Show history', 'Show me around', and a 'Revert to previous version' button. The main content area is titled 'ApplyOnline 'How To' Videos' and contains a list of tutorial topics: '1. How to upload and attach documents', '2. How to bulk attach multi-page PDF', '3. How to verify', '4. How to submit additional documents', and '5. Using the mark-up tools'. A video player is embedded on the right, showing a video titled 'How-to upload and attach documents' from NextGen.Net. The video player has a play button, a progress bar, and a 'vimeo' logo. The video content includes the 'applyonline by NextGen.Net' logo and the text 'Supporting Documents Service HOW TO UPLOAD AND ATTACH DOCUMENTS'.

- Also the **AMP Bank Distributor Centre** has helpful User Guides and Tutorials:  
[www.amp.com.au/distributor/applyonline](http://www.amp.com.au/distributor/applyonline).

# 14. Escalation and other sources of help

What do I do next if none of these resources has resolved my question?

If you use your Aggregators CRM system and your question is **TECHNICAL** in nature e.g.

A system error message

Screen or application freezes

Documents won't attach

"Submitted" documents have disappeared

**Please Contact**

**Aggregator Broker Support**

If your question is **PROCESS** or **POLICY** in nature e.g.

You're unsure which documents are mandatory

You're unsure about how to self-verify documents

You want to check your application status

You have a question about an AMP Bank policy or procedure

**Please Contact**

**AMP Originator hotline**

**1300 300 400**

Available from 9am–7pm Monday-Friday EST

