Retrieving "Other Documents" in Dynamics

Users can log into the Institution Portal to view documents uploaded by DFI Staff. Examples: Report of Examination, Facility/Branch Certificates

- The Primary Contact of the institution will receive a notification that a document has been uploaded. They can follow these directions to view and download the document.
- If a Secondary Contact requests to receive the document, they will not receive an email notification, but they can follow these instructions to view and download the document.
- 1. Choose either "Banking Portal" or "Credit Union Portal". Then click on "Other Documents".

RTH COTO Financial Institute Legendary."	tutions 🔒 🔒	Banking Portal -	c			
Banking Portal >	Banking Dashboard					
	Payments and Fees					
	Application Signatures					
anking D	Annual Report of Examining Committee					
	Application to Establish a Facility					
	Application for Loan Production Office	2	-			
	Application to Establish a State-Chartered Bank Trust Branch					
	Application for Merger or Consolidation					
	Application to Move Main Office or Facility					
	Assessment Calculator					
	Dividend Worksheets					
Application	Extension Request - Other Real Estate Owned					
LPO-01053	Other Documents					
	Year End Forms					

2. Click on the down arrow, then choose "View Details".

Other Documents

INSTRUCTIONS

Attach and Submit other documents by selecting Upload Files.

						Upload Files
Name 🖊	Submitted By	Submitted	Status	Status Date	Description	
DOC-01095	DFI Staff	4/8/2024	Submitted		Test	

3. Click on the document name.

Other Documents

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Selecting the box below indicates that one or more of the uploaded documents contain confidential information that is not a matter of public record.

Confidential Documents Description
Test
**Note that attaching multiple documents requires that all files reside in the same folder of your file directory prior to selecting "Choose Files".
Note Text
How to Set Folder to Auto-Delete.pdf (255.28 KB)

4. Depending on the browser you are using, it should download directly to your computer.

