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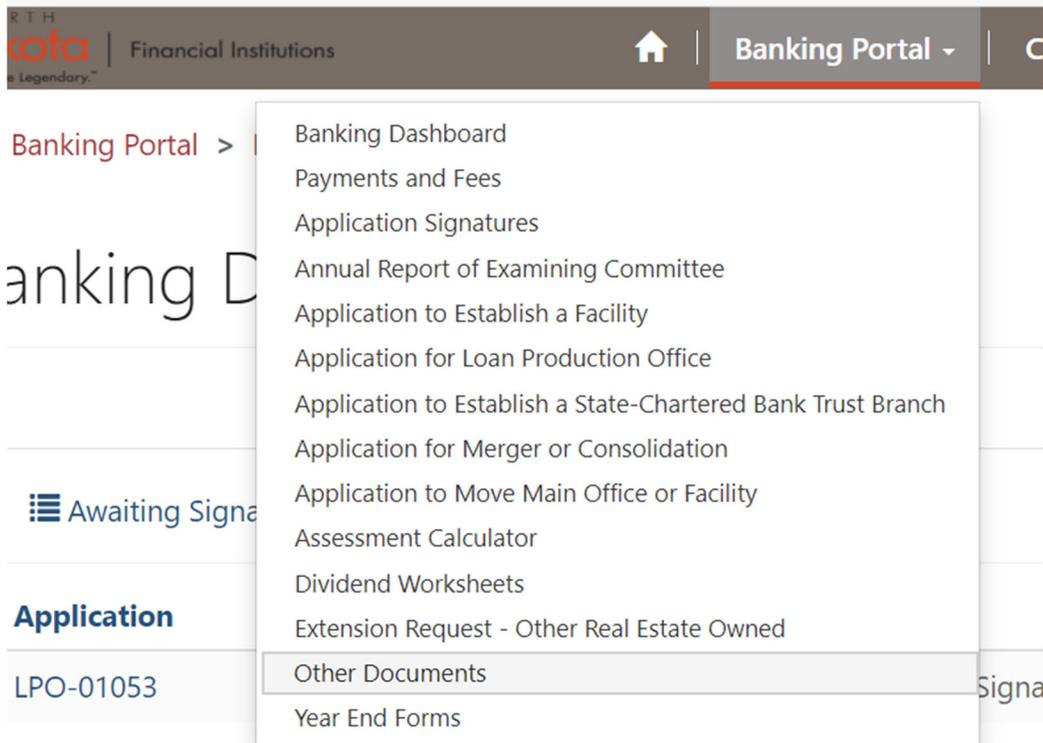
2. **Click on the down arrow, then choose "View Details".**

3. **Click on the document name.**

Other Documents

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
Testing

📄 How to Set Folder to Auto-Delete.pdf (255.28 KB)

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