

How to Upload Documents and View Completed Documents

Duration (Mins): 7 minutes 20 seconds

Hello Parents! This tutorial video will show you how to manage your incomplete and complete document checklists that have been assigned to you by your agency. A document checklist will be assigned to you when the agency requires documents, such as during enrollment, and you will be able to upload the items right from your Parent Portal account. Please [click here](#) to access the help video.

Video Narration

Hello and welcome to this Hubbe tutorial. My name is Cierra, and today, I'll be showing you how to manage your incomplete and complete document checklists and eSign documents that have been assigned to you by your agency.

Upon logging in, you will see your Parent Portal landing page, including items such as the "General Announcements" and "To Do Items" boxes, explained in another tutorial video.

*On the left-hand side of your screen, you will notice your Menu. Click the "Documents" menu item. There are two sub-menu items, one containing your **Incomplete Document** assignments, and one containing your **Completed Document** assignments.*

*Let's first take a look at your **Incomplete Documents** record.*

This record contains your document assignments and signatures that you have yet to complete.

At the top of the record, the eSign Documents card will list all the documents that have been sent to your parent portal account by your agency administrators for you to sign.

In this example, we have been sent the Income Declaration to sign during our enrollment process. You will also receive the Income Declaration during your enrollment process if you are applying for state-subsidized services.

You can click the “Download” button to download the income declaration in English or Spanish to print it out and physically sign.

Alternatively, you can easily sign the income declaration right from your portal account, which will send the document back to your agency with your electronic signature. Simply click the blue “Sign” button.

You will be redirected to the document needing the signature. Before continuing, I would like to briefly point out that all documents needing a signature will also appear in your “To Do Items” box on your landing page. Click the item link to enter the document needing the signature.

Now that we have reviewed both ways to navigate to a document requiring your signature, we can now sign it. We will click the blue “Sign” button at the bottom of the document. Other documents may look a little different, but just look for the “Sign” button.

In the Signature pop-up modal, use your mouse, trackpad, finger, or stylus to provide your electronic signature. If you don’t like how it turned out, no problem. Simply click the red “undo” arrow to clear the signature and try again.

Once you are satisfied with your signature, click the blue “Apply Signature” button. Notice the signature now inserted in this card. The “Date Signed” will automatically populate with the current date.

All there is left to do is click the blue “Save” button at the top of the document. Upon clicking “Save,” your document with your signature will be sent back to your agency and your job is done!

You have been redirected to the document now including your electronic signature that you can download in English or Spanish.

Let’s now click “Back to Documents” to exit the document, which will bring us now to the **Completed Documents** record, where your signed document will now be listed in the “eSigned Enrollment Documents.”

For now, let’s go back to the **Incomplete Documents** record to see what else we may need to upload or sign.

Below the eSign Documents card, all the Document Checklists that you have been assigned and are incomplete will be listed. Before continuing, I would like to briefly point out that all document checklists that you have been assigned will also appear in your “To Do Items” box on your portal landing page. Click on the item link to enter the document checklist record where you can manage your checklist items.

Now that we have reviewed both ways to navigate to a document checklist that is still incomplete, we can now upload items to the checklist.

Click on one to expand the checklist and see the items in the list. Please note that your checklist items may appear different from what is seen here depending on the device you are using.

You can see what you have already uploaded and whether those uploads have been approved by your agency, indicated by a green check mark in the far-right column.

To upload a new document click the blue “Upload” button, and then select your file and click “Open.” Now click “Save” to upload it to the checklist item.

Upon clicking “Save,” your upload will be sent to your agency. You can click the trash can icon to remove your upload, but once it has been approved by your agency, you can no longer delete the upload.

There are a couple download options here that I would like to point out. First, there is the “Download All Checklists” button that downloads a PDF of each checklist you have been assigned and that is still incomplete, showing the items you have completed and have yet to complete.

Alternatively, you can click the download icon next to an individual document checklist to download a PDF showing the checklist items for just that document checklist.

Once your agency has marked your checklist as “Completed,” then the entire document checklist will move over into your **Completed Documents** record.

Let’s now navigate over to the **Completed Documents** record. This is where all completed assignments are stored, including documents that you have signed and document checklists that you have completed.

For the eSigned Documents, click the “View” button to enter the document record and view your signature. You can also download the signed document in English or Spanish by clicking the “Download” button.

In the two document checklist tabs, you can view the active or archived document checklists that your agency has marked as “complete” for you.

If the checklist is in the “Active Document Checklists” tab, you can still upload new documents and delete uploads that have yet to be approved. However, once your agency has archived a document checklist, it will move to the “Archived Document Checklists” tab and you will no longer be able to upload new files.

In both tabs, you have the option of downloading your completed checklists, either individually or all together.

This concludes the tutorial video on how to manage your incomplete and complete document checklists. Please check out our other help videos to learn more.

Have a wonderful day and thanks for watching!