

Sertifi

eAuthorizations Quick Start for Admins

Sertifi eAuthorizations

This guide walks you through the sending process for Sertifi eAuthorizations. This is the basic process for Sertifi Admins to follow when sending an authorization form to a guest. For more details about the options available for customizing authorization forms, or additional fields, see our online Support Center.

Send an authorization form

- 1. Log in to your Sertifi Portal.
- 2. Click Send File to create a folder to add your authorization form to.



3. Enter a unique file name so you can quickly recognize the folder once you receive the authorization form.



- 4. Provide an email address for your first-level participant or add a first-level participant from your Sertifi address book.
- 5. Upload your authorization form from your computer or your Sertifi Document Library.



6. Send the form to your guest. That's it!