FYI Notifications in Your Action List

Overview

Occasionally you will see an item come into your Action List and be labeled, “FYI”. If this happens, follow the steps below to remove the item from your Action List.

An eDoc requiring “FYI” action is simply a notification. The document will be processed with or without the “FYI” action being completed.

Steps

Notification of FYI item

1. You will be notified via email if you have an item requesting “FYI” action. You can click on the link in the email to access the document in your action list.

Remove FYI Item from Action List

1. If you would like to view the document, click on the Document ID.

2. To remove the item, click on the drop down arrow in the Actions column and change NONE to FYI. The item will automatically disappear from your action list.