

Unite Education Program v10.0

Job Aid: 5621

## Add a Document to a Person Record




In Unite, you can add documents to a person record. Person documents are different from application documents because they are specific to the person and are not likely to change if there is more than one application record associated with the person. In addition, person documents are not typically required for application verification. However, they are available for reviewers when an application is assigned for review. The file types you can attach to a person record are: .pdf, .png, .doc, .docx, .xls, .xlsx, .text, .jpg, .jpeg, .rtf, .tif, .tiff, .csv, .gif, and .msg. The maximum file size is 30 MB.





### To add a document to a person record

1. Open a browser and log on to Unite.
2. On the main menu, click PEOPLE.
3. Find and open the person record.

#### Note

You can find person records by performing a search, opening a view on the *Search Results* tab, or checking the *Recents* grid. Each person name is a hyperlink to open the record.

4. Click  to expand the *Profile Documents* section.
5. Click  .
6. From the **Document Type** list box, select the type of document you want to add.
7. Click  and select a file to add.

8. Click  .
9. Click  .
10. Click  to close the *Add Document* window.
11. Click  to close the person record.

### Related resources

- [5433 - Perform a Person Search](#)
- [5743 - Open a Person Record](#)