



Filling out forms in BP Logix is like completing most online forms. This document offers some suggestions where practices differ slightly.

## Navigating in a Form

Following are some tips for navigating from one field to the next in electronic forms.

- In most cases you can press the **[Tab]** key to move from one field to the next.
- If you are unsure of what a field is or what it is asking, try hovering your cursor over it. Oftentimes a tooltip with an explanation will appear.
- Some fields are set to fill automatically based on an entry you have made in a previous field. This means that filling in or selecting information for one field will cause other fields to fill.
- In some cases, completing a field or making a selection will cause additional related fields to appear.
- Many forms have an ATTACH FILE button. If you need to attach a file, it works just like attaching a file to an email message.

## Working with Required Fields

Some fields on forms are required. This means that you cannot submit the form until you have entered the requested/required information.

Required fields are identified in one or both of the following ways:

- A red asterisk appears in front of the field
- The field is bordered in red.

If you forget or miss completing a required field, when you try to submit the form, you will be prompted to complete the missed field.

## Using Save and Close for Later

There will be times when you need to stop working on a form even though it is not complete.

When that is the case, click **SAVE AND CLOSE FOR LATER**

The form now appears in your *Task List* on the BP Logix homepage.

1. The *Loading* icon may appear as BPLogix processes the information  
The *Funding String* and *Old Code* fields fill automatically.
2. If the BP Logix could not verify the account, or if you know you have the wrong account,
  - a. Click **RESET**
  - b. Repeat steps 1 - 6