



# How can I fill in the Self-assessment and submit my Financial Statements?

Please follow the below instructions to complete the Self-assessment and the Financial Statement submission process:

## Step 1.- Self-assessment Notification

The Agency's Financial Assessment Contact receives an email notification once the Self-assessment is available. The Self-assessment can be accessed via:

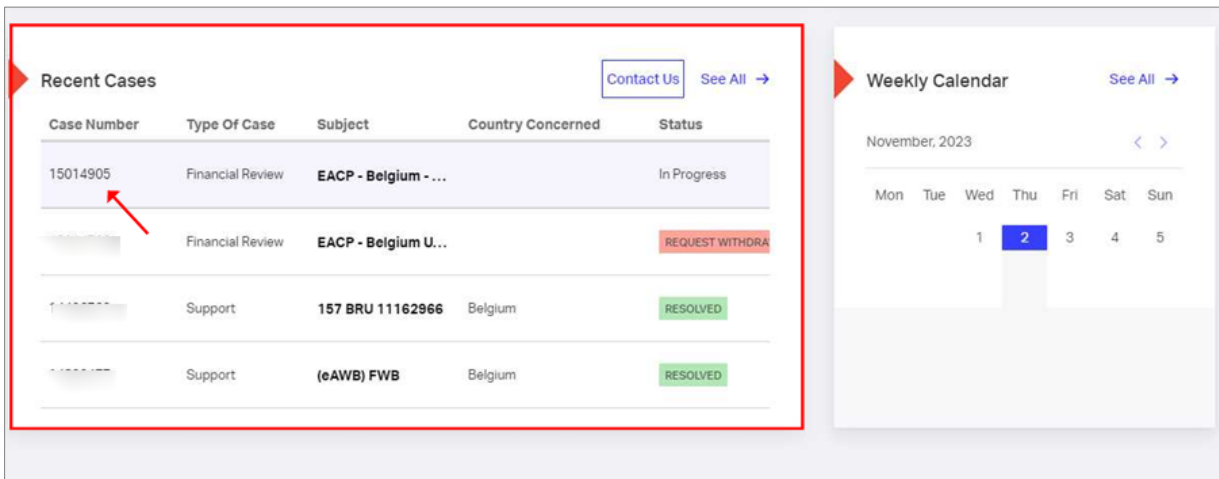
- 1) The link provided in the email;
- 2) the IFAP Service on the [IATA Customer Portal](#); or
- 3) the Notification Bell on the [IATA Customer Portal](#).

## Step 2.- Login/Register

Login to the [IATA Customer Portal](#).

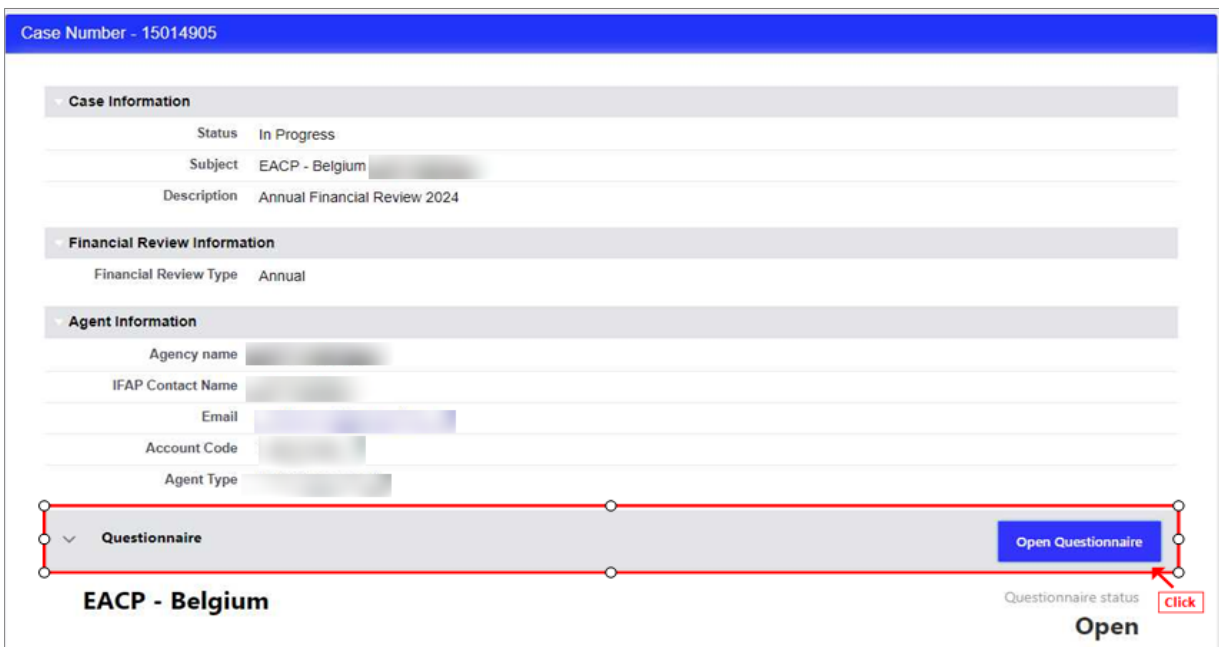
## Step 3.- Go to the Financial Review case

Under your Recent Cases section, select the 'Financial Review' case.



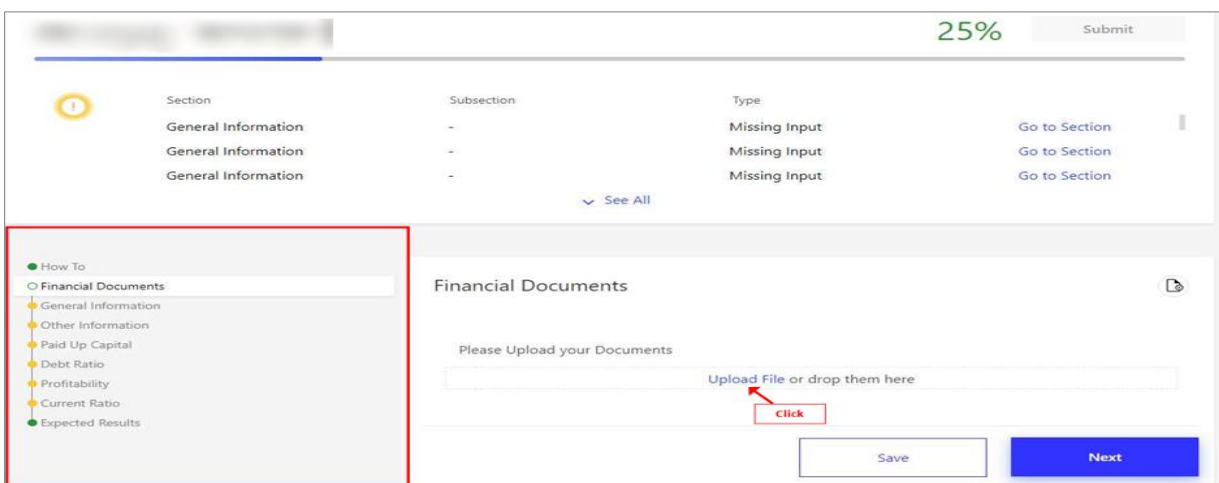
## Step 4.- Open the Self-assessment.

1. In the case, click on 'Open Questionnaire' on the Questionnaire section to start the Financial Assessment and the Financial Statement Submission process.



2. Under the 'Financial Documents' section, select 'Upload File' to upload your financial documents.

*Upload your documents in PDF format as usual. You may upload more than one file.*

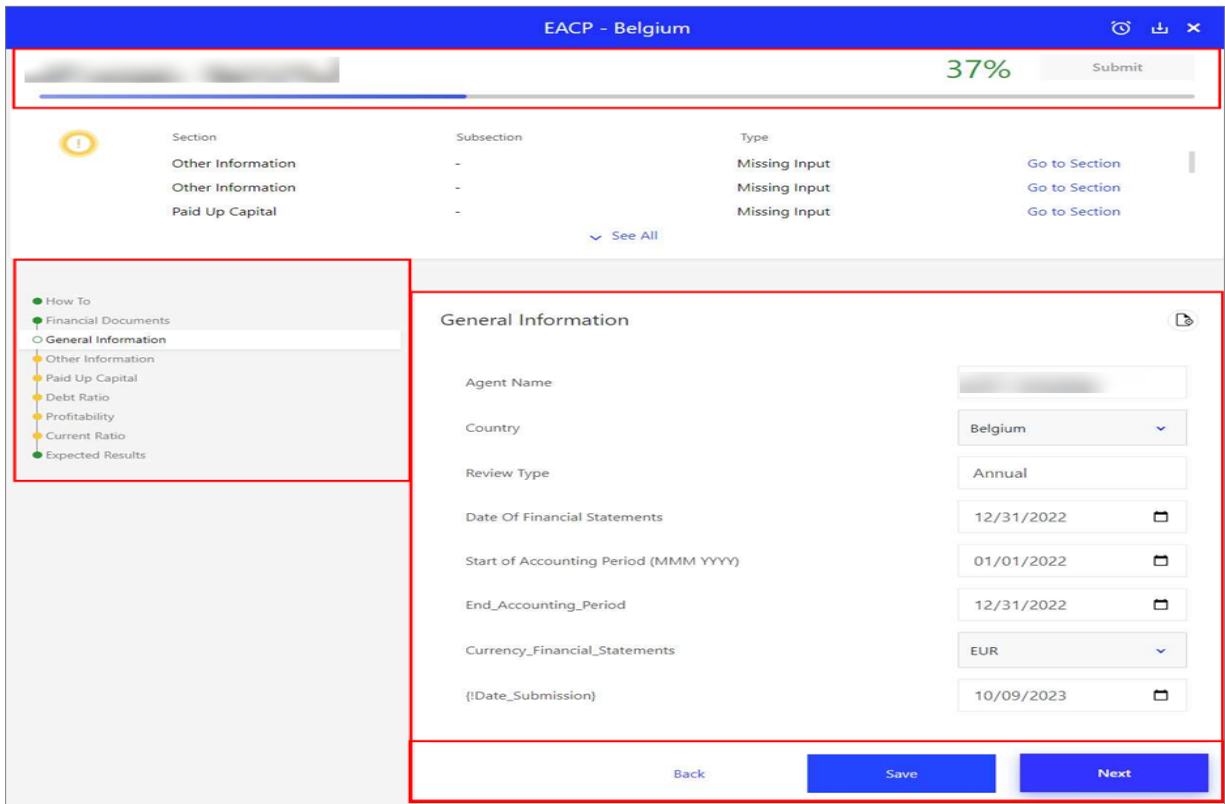


3. Fill in the self-assessment.

After uploading the Financial Documents, you will be able to fill out the self-assessment components by navigating the different sections on the left menu.

Filling out the self-assessment is mandatory but if there are non-mandatory questions, you may leave them incomplete or blank (*Any inaccurate input in this questionnaire will not impact the outcome of your financial review results.*)

Upon completing the input of all components within each section, first select the 'Save' option and then click on 'Next' to go to the next section.

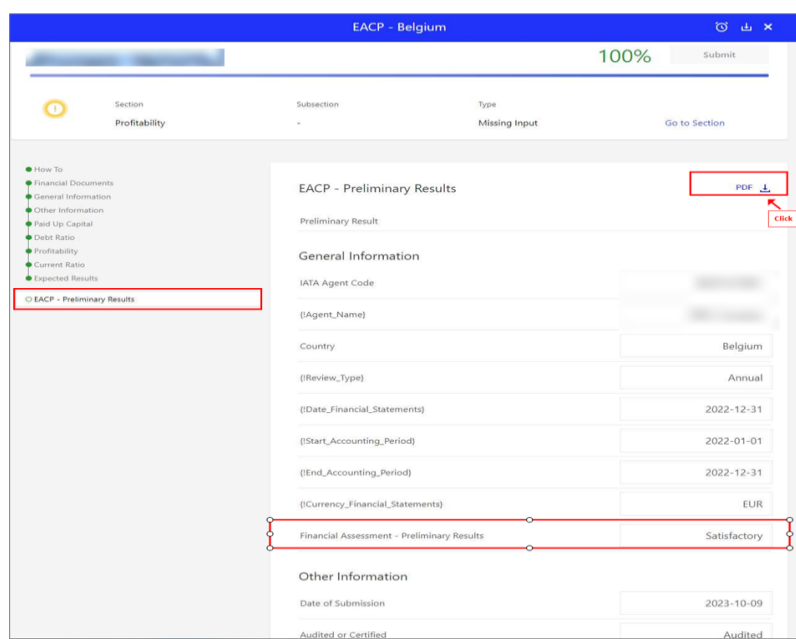
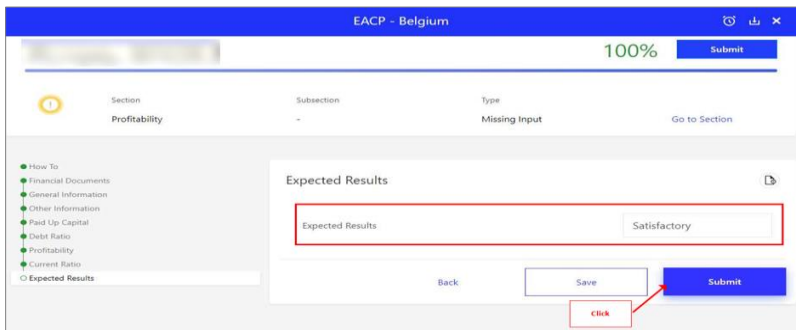


4. Expected Financial Assessment Results.

Upon completing and submitting all the Self-assessment sections, you will see the preliminary Financial Assessment outcomes ('Expected Results').

Additionally, you can download a comprehensive PDF document including all completed sections along with the corresponding results for each section.

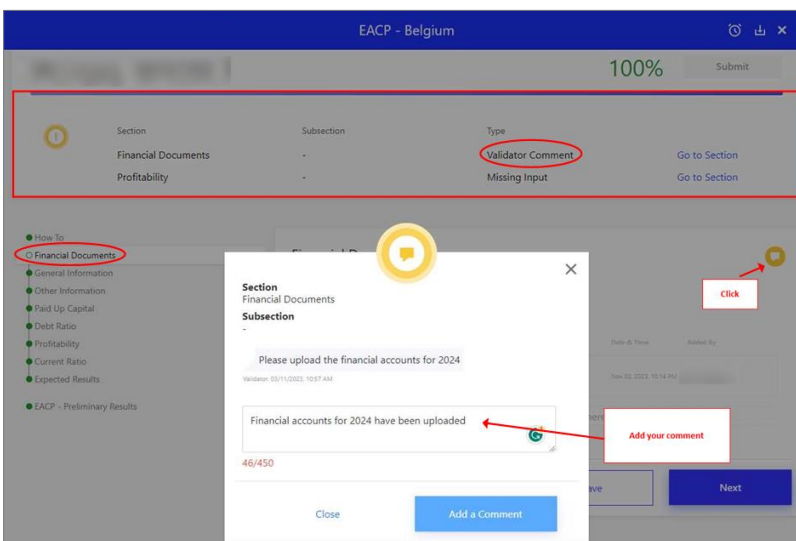
*This feature will allow your agency to anticipate any potential Financial Security requests.*



**Step 5.- Interaction with GFA and Final Results**

After submitting the Self- assessment, our Global Financial Assessor will initiate the review process.

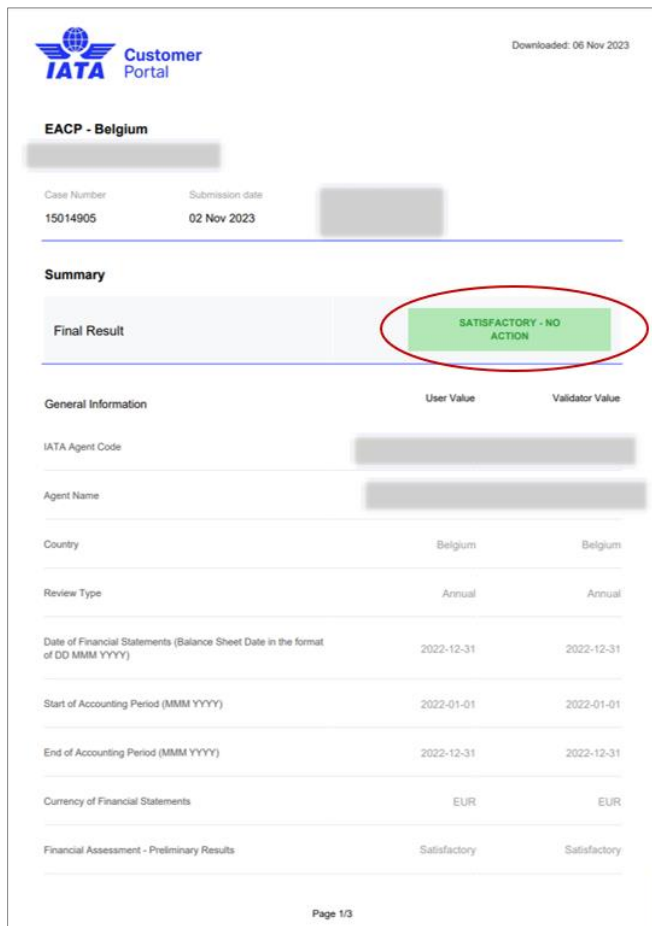
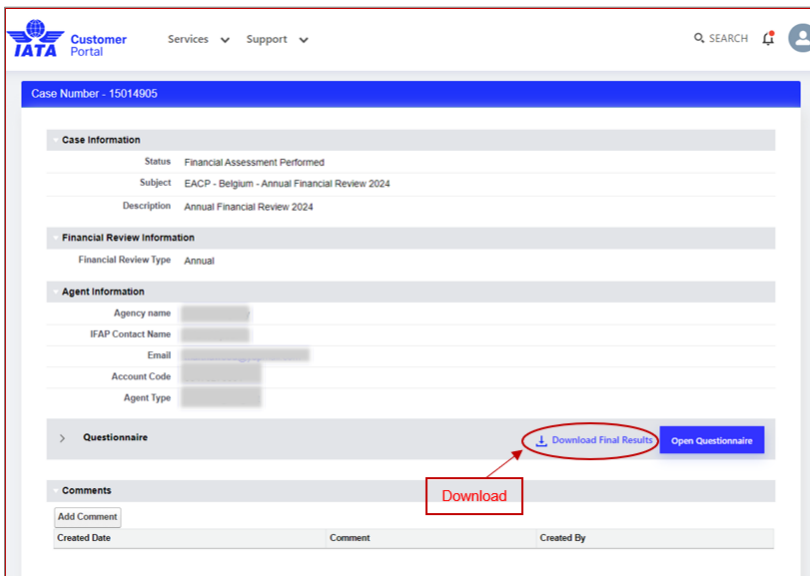
If any additional information is needed, you will be contacted directly by the GFA via the new chat box feature, enabling direct interactions with the validator (GFA), and expediting the Financial Assessment.



1. Finalizing the Financial Assessment.

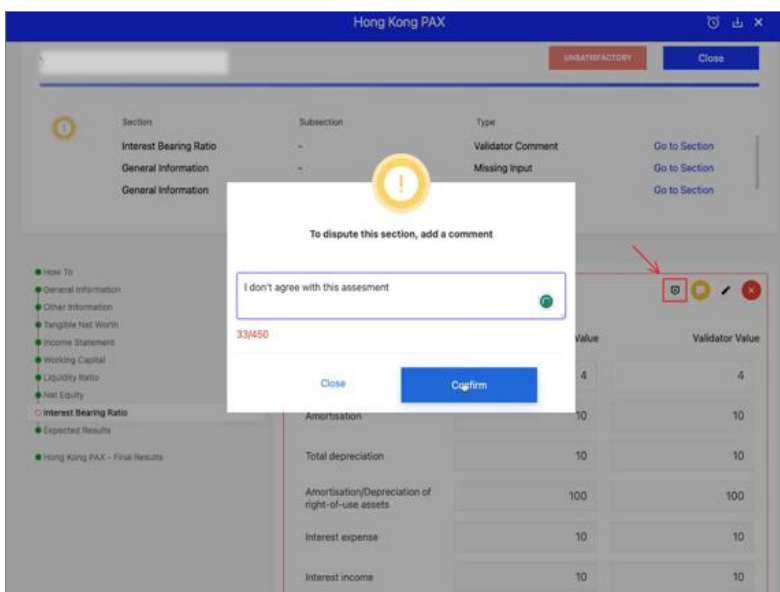
Upon finalizing the Financial Assessment, you can review and download the final results in a PDF report, which includes both the customer and the GFA-provided data.

This provides transparency and helps your Agency to prepare for the Financial Assessment process.

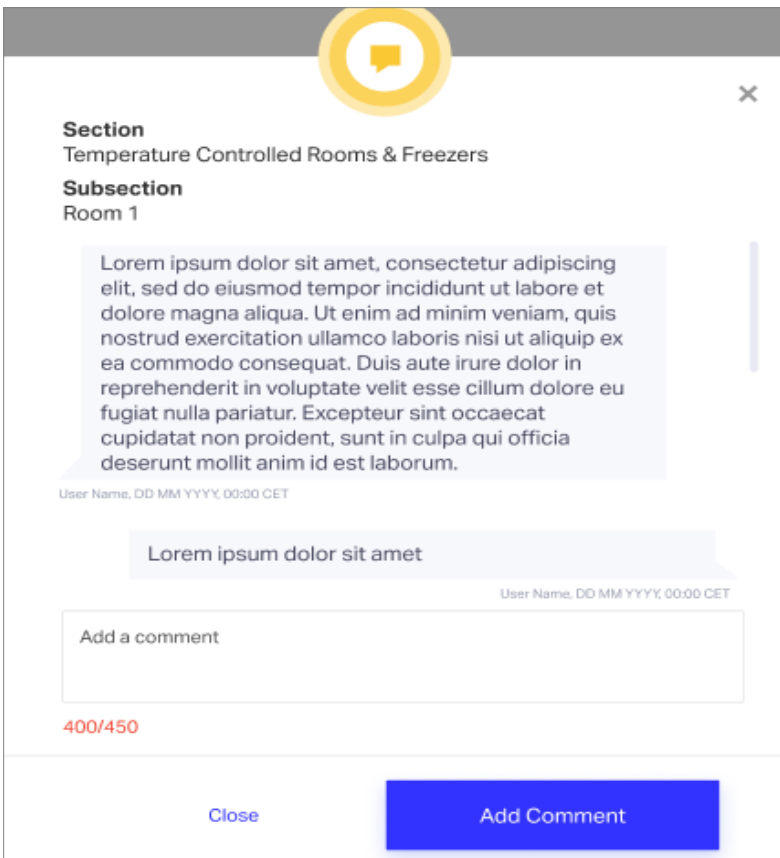


## Step 6.- Financial Assessment Dispute

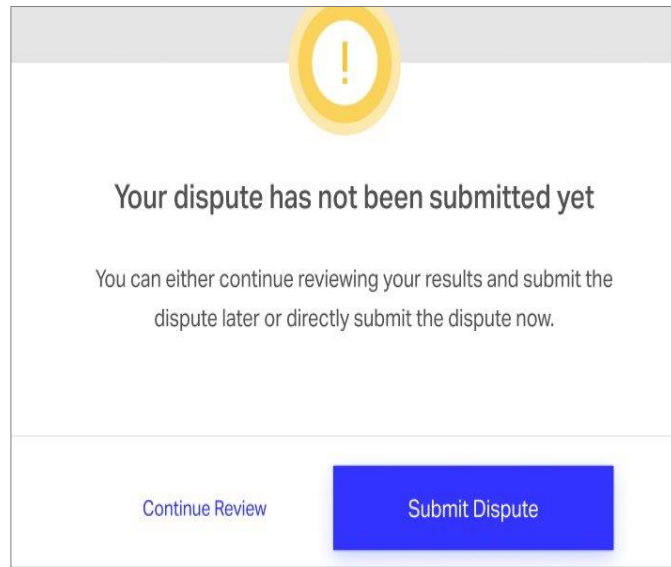
If you have reviewed the final results and have found a specific area that you believe has been misinterpreted, you can 'dispute' an outcome using the dispute button in the appropriate section.



1. When you click on 'Add Comment', the comment gets submitted.



2. Once all the actions are completed, you can submit the Dispute by clicking the 'Submit Dispute' button on the pop-up window.



3. Once you submit the dispute, you will get a confirmation pop-up.



You can initiate a dispute **within a 90-day window following the receipt of the Final Results** based on the rejected section(s). *You can only use the dispute action once per section.*

When the Dispute is submitted, the Self-Assessment status is displayed as **Dispute Open** and the Financial Assessment case status gets updated as **In Progress** on the IATA Customer Portal.