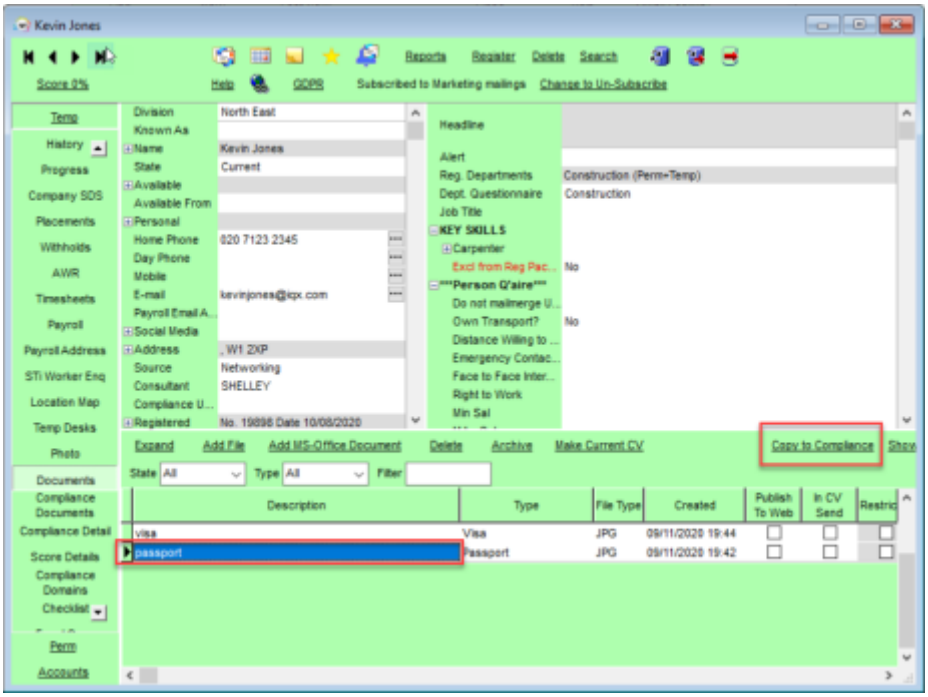
Separation of Compliance Docs and Docs

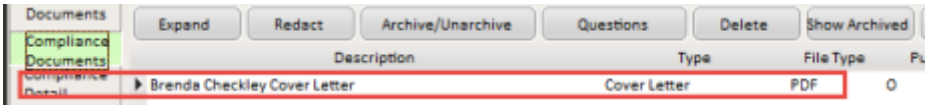
This feature separates out Compliance Documents by document type.

To access this feature in the Person form, scroll down the sidebar.

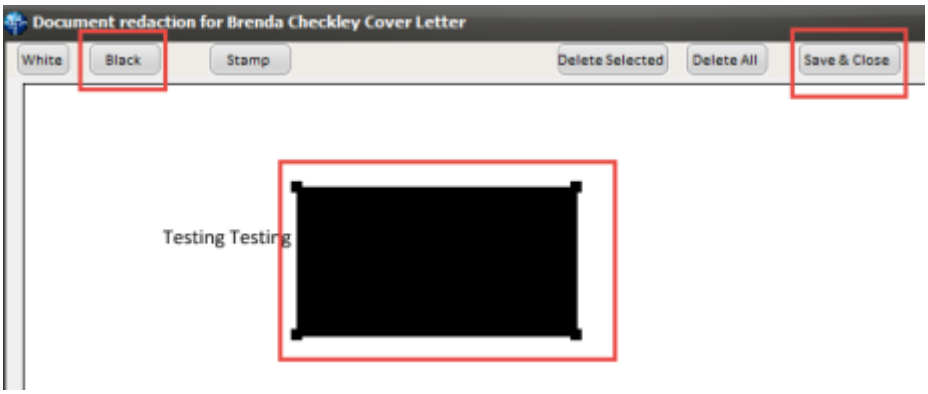
Compliance documents can be created in:-
Person form – Documents – Select document - Copy to Compliance **OR** Drag a document into Compliance Documents. Select all or part of the document - Save Compliance - Select Document Type – Complete Compliance document questionnaire.



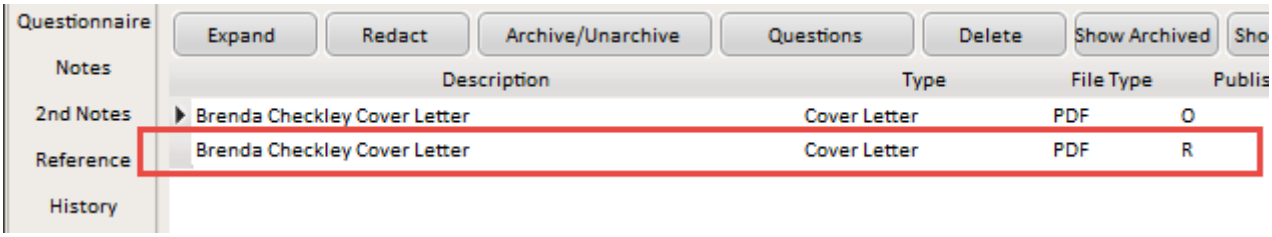
Compliance documents are saved as pdf documents. A pdf copy of the compliance document will be saved in Compliance Documents.



Compliance documents may be redacted. Select the document – Redact – Select the Black or White button - Click and hold down the left mouse key to drag a square over part of the document – Save and Close.



Redacted documents have a file type R in Compliance Documents.



This feature may require System Administrator setup.

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