Linking Questions to Compliance Documents

It is possible to configure IQX so that when you add a compliance document to a candidate record, you are either prompted to fill in certain questionnaire items or you are required to do so before you can complete adding the document.

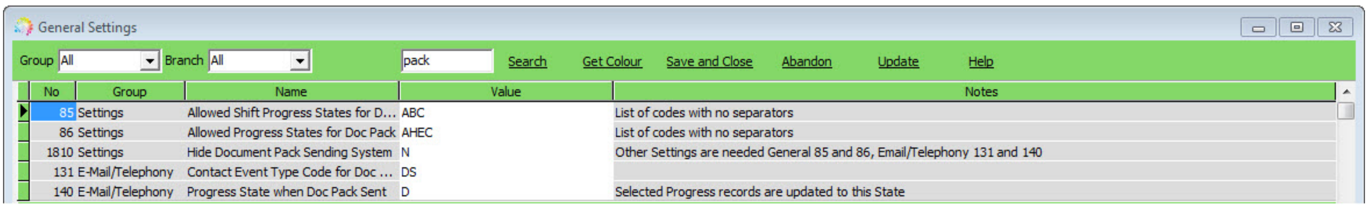
Compliance documents are set up as Document Types in Agency Setup and can only be administered by Users with the relevant roles.

Only candidate document types can be compliance. When adding a document of a compliance type, it prompts or forces you to answer questions before allowing you to complete.

Setup

General Settings

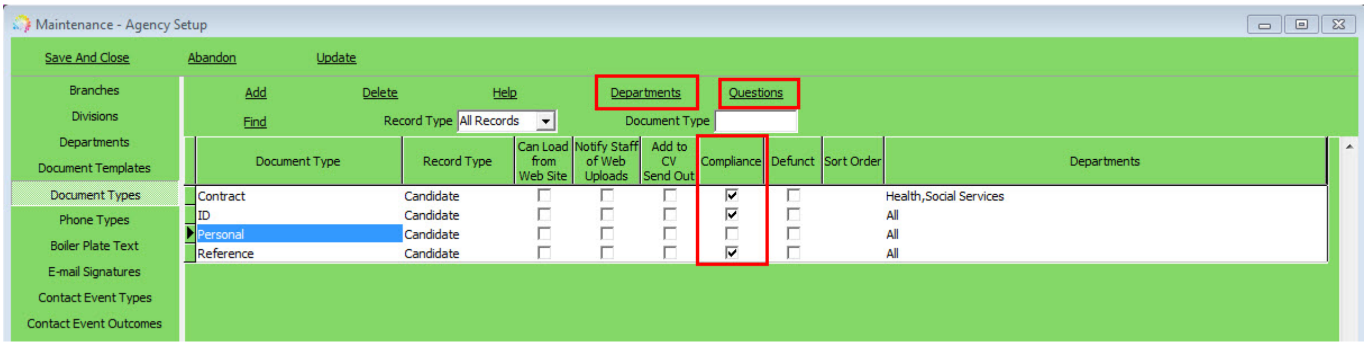
- Settings 85 Allowed Shift Progress States for Doc Pack - list of Shift Progress State Codes (no separators)
- Settings 86 Allowed Progress States for Doc Pack - list of Progress State Codes (no separators)
- Settings 1810 Hide Document Pack Sending System set to 'N'
- Email/Telephony 131 Contact event type code for doc pack sent = Add new CE type for 'doc pack sent' and use relevant code.
- Email/Telephony 140 Progress state for when doc pack sent = add new progress state for 'Doc Pack Sent' and use relevant code.



User Role User needs compliance role to be able to manage and send compliance documents.

Document types

Agency Setup> Document Types.



Tick the relevant types as compliance or create new and tick for compliance.

The default is they are accessible for all departments. To restrict which departments they are used for, click on the Departments button and select. If you want to link the document type to departmental questions they need to be allocated to that division.

Link the document type to questions. Document type can be linked to more than 1 question. Required means MUST exist before a compliance document can be added and before a doc pack can be sent. Doesn't let you save unless you have answered the question if question set as required. Included means question appears when adding doc but not forced to answer it to be able to add the document on.

Adding Compliance Documents

Adding compliance documents – directly to compliance docs by drag and drop. Or if exists already in documents then copy to compliance button. Can split a PDF up by selecting and saving or select all and save all. Redact as white or black (or stamp if stamp exists in folder). Drag where redaction should be. Save & Close, update record and will see O original and R redacted.

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