



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.

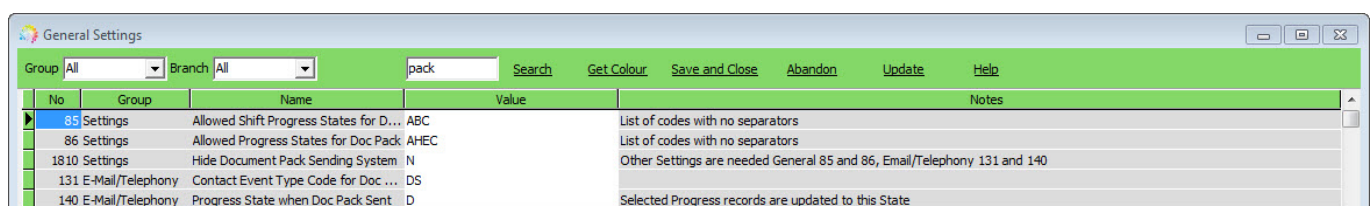
Compliance documents are set up as Document Types in Agency Setup and can only be administered by Users with the relevant roles.

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.



No	Group	Name	Value	Notes
85	Settings	Allowed Shift Progress States for D...	ABC	List of codes with no separators
86	Settings	Allowed Progress States for Doc Pack	AHEC	List of codes with no separators
1810	Settings	Hide Document Pack Sending System	N	Other Settings are needed General 85 and 86, Email/Telephony 131 and 140
131	E-Mail/Telephony	Contact Event Type Code for Doc ...	DS	
140	E-Mail/Telephony	Progress State when Doc Pack Sent	D	Selected Progress records are updated to this State

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

Document types

Agency Setup> Document Types.



Maintenance - Agency Setup

Save And Close Abandon Update

Branches Divisions Departments Document Templates

Add Delete Help Departments Questions

Find Record Type All Records Document Type

Document Type	Record Type	Can Load from Web Site	Notify Staff of Web Uploads	Add to CV Send Out	Compliance	Defunct	Sort Order	Departments
Contract	Candidate	☐	☐	☐	☒	☐		Health,Social Services
ID	Candidate	☐	☐	☐	☒	☐		All
Personal	Candidate	☐	☐	☐	☐	☐		All
Reference	Candidate	☐	☐	☐	☒	☐		All

Document Types Phone Types Boiler Plate Text E-mail Signatures Contact Event Types Contact Event Outcomes

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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