

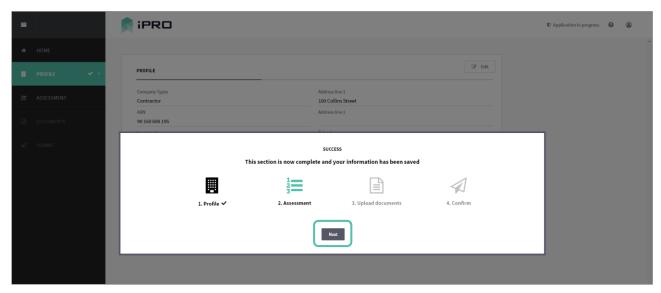
Member Assessment

Quick Tips

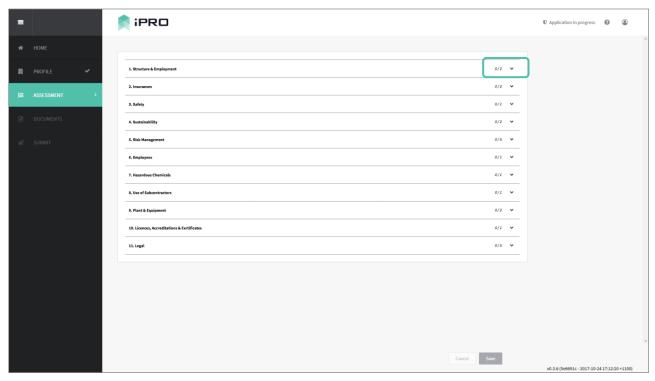
- Click 'Save' at any time to complete your assessment later.
- The assessment is not completed until all questions have been answered.
- Assessment answers determine the mandatory documents to be uploaded.

Complete Assessment

1. Once you have completed setting up your profile, the following screen will display. Select 'Next' (refer below).



The assessment module will load, ready for completion. Simply click on the dropdown arrow of 'Structure and Employment' to commence answering assessment questions (refer below).

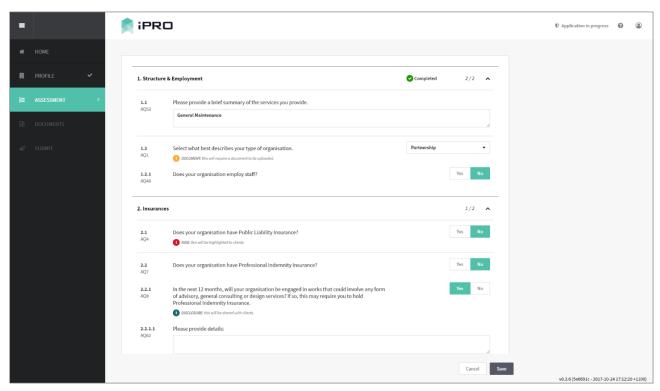




3. Answers to questions may result in the following icon appearing:

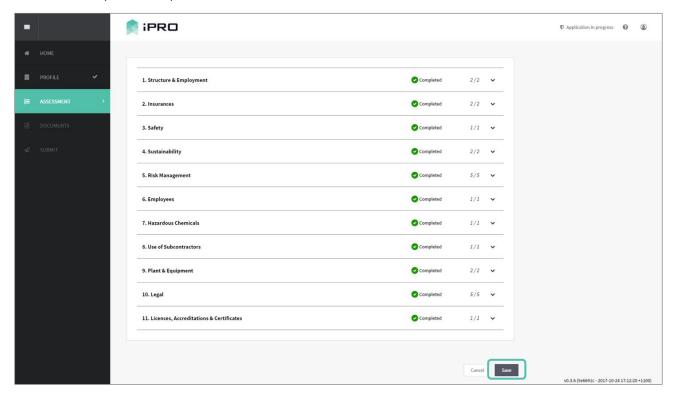
Icon	Meaning
0	DOCUMENT: This will require a document to be uploaded
0	RISK: This will be highlighted to clients
0	DISCLOSURE: This will be shared with clients
•	AUDITABLE: This may be subject to future audit

4. Complete all assessment questions.

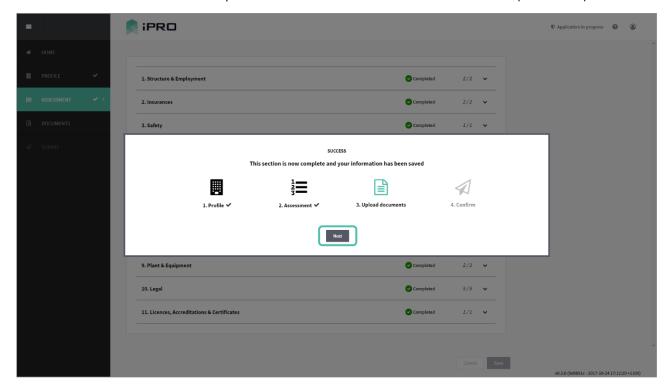




Click 'Save' (refer below).



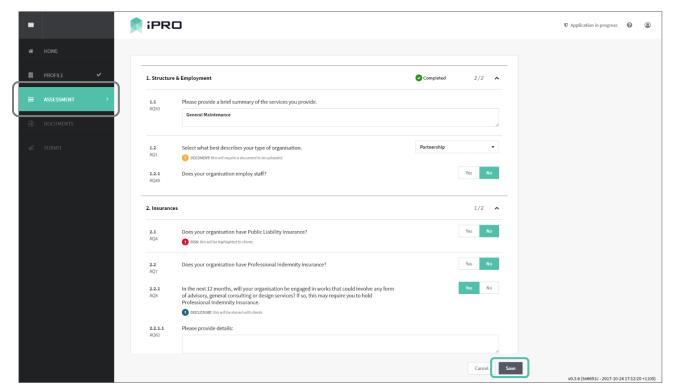
6. Once you have completed the assessment and clicked 'Save', the following screen will display. Clicking 'Next' will start the documents section. If this screen does not appear, there will be a question that remains incomplete. Please check all sections to ensure a completed icon is shown next to each assessment section (refer above).





Save the Assessment Part Way

1. Navigate to 'Assessment' module in the left hand side menu (refer below).



- 2. Commence the assessment questions.
- 3. Click 'Save' (refer above).