Disclosure Builder

With Disclosure Builder you can easily create and edit disclosures within their compliance-training program. Using this resource, administrators can manage their program's Activity Log, Entertainment, Gifts, Outside Business Activities, Political Contributions, Securities Transactions, Social Media, Outside Brokerage Account, Securities Received, Checks Received, and Customer Complaints.

In Questionnaires > [Pick the appropriate disclosure from the left hand menu]

Create a Disclosure Shell

- Click ⊕ to create a new disclosure
- Complete the form with disclosure details.
    - PY is the program year of the disclosure
    - Fields with * are required
- Best Practice: Before you begin, create a question and answer 'road-map.' Make sure it includes all of the logic and flagged items you'd like to include in your disclosure.
- Click Add when form is complete.

Disclosure Dashboard

- Click ☰ at the top of the screen to view more options:
    - Update
        - Title
        - Standard Form Inclusion
        - Active
        - Program Year
    - Duplicate
        - Makes another copy of the questionnaire
    - Notification Emails
        - Turn notification emails on and off
        - Specify administrators and supervisors who should receive emails

Adding Questions

- Click ☰ in the General heading and select Add Question to create a new question
- Complete the form
    - Multiple question types are available – Click here to view your options.
    - Fields with * are required
- Click add when question is complete

Adding Answers

- Complete the form with the desired answer
    - This option will not be available if the Question Type chosen is Date Picker, Percentage, Text Box, Text Area, Address, or Electronic Signature
- Choose if the Notification Flag will be on or off
    - If the flag is on the administrator will receive an email alerting them of the user's answer.
- Continue adding answer options as needed.
    - Jump logic can only be turned on after the question is built through the Edit menu
- Click ⊕ to add another question or TOC to return to the disclosure dashboard
- Click ⊘ to edit the question

Jump Logic

- Click ⚒ to view question details
- Click ⬚OFF to turn jump logic on for the question
- Choose the answer that triggers the jump and then the question number it should jump to when that answer is chosen.
- Click 'Update" when finished

Editing Content

- Click ⚒ to view question details
- Click ⊘ at the top of the screen to edit the question
    - You can delete a question in the edit screen if the questionnaire has not been completed by any users
- Click ⊘ next to each answer to edit the answer
- Click the arrow ⌃ or ⌄ icons to move a question up or down in the list
- Click ⊕ to add another answer

Repeat 'Adding Questions' and 'Adding Answers' as needed to complete creating the disclosure.

❓ Additional Help

At anytime throughout your program you can contact your Account Executive or utilize our support center. For more information about Quest CE or our products visit www.questce.com.

Support:

- Call (877) 593-3366
- Available Monday through Friday 8am – 5pm (CST)
- Email support@questce.com