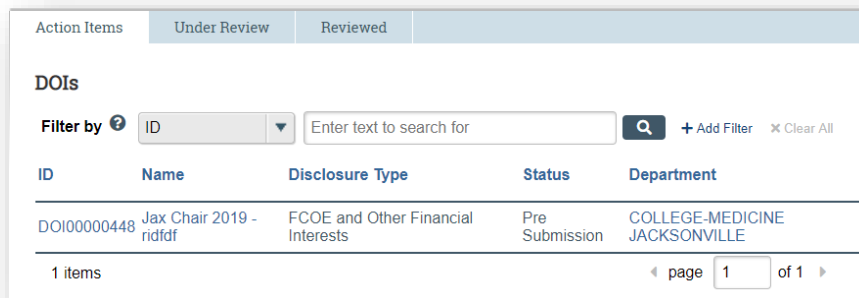


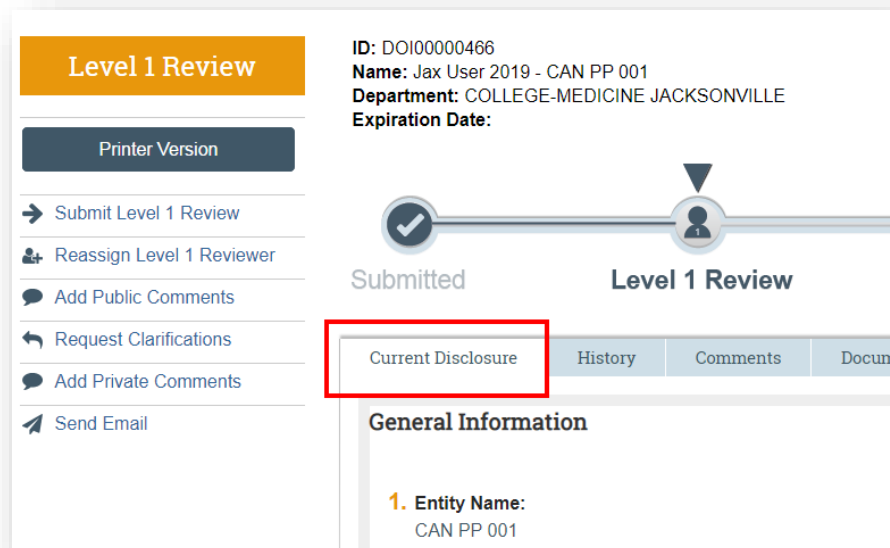
UFOLIO QUICKSTART REVIEWER GUIDE

The following instructions will walk you the basics of how to use UFOLIO as a Reviewer.

1. Click on the **disclosure** you wish to review.



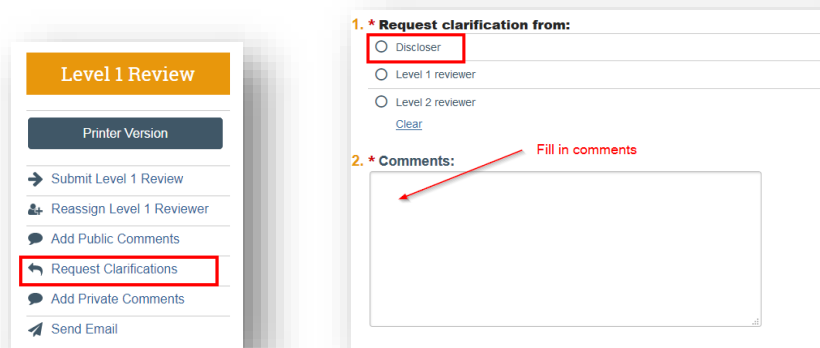
2. You are now in Disclosure Workspace. The information for the disclosure is defaulted as your first view, otherwise called the “**Current Disclosure**” tab. Scroll down the page to review all of the information.



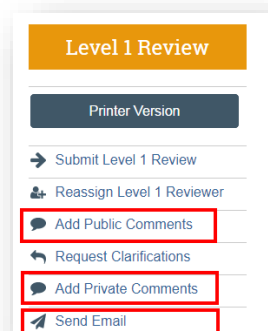
3. You may also see other pertinent information about the disclosure by clicking on any of the **tabs**. The Disclosure Portfolio tab is of special note. It will let you access and view all disclosures that a person has, if you have the corresponding permissions.



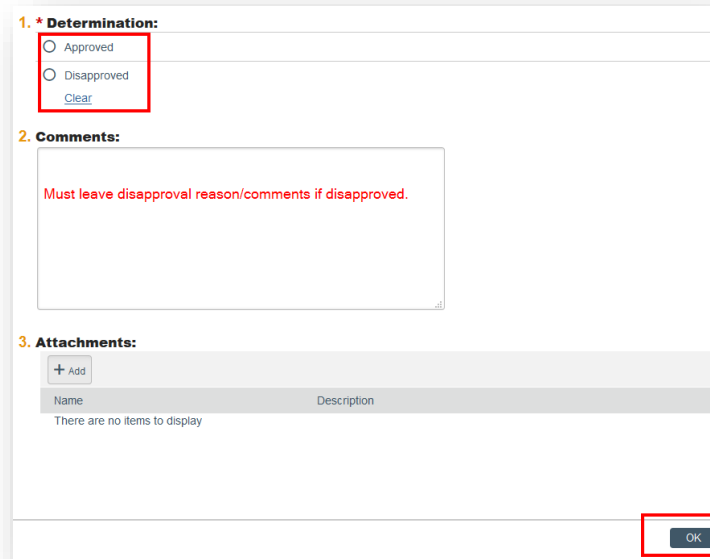
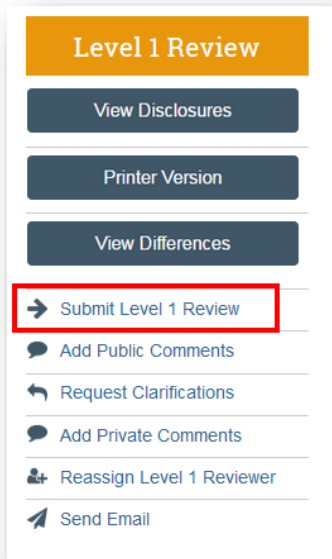
4. After reviewing all pertinent information, if you need clarification from the discloser, click **Request Clarifications** from the left-aligned activities menu. Then, select **Discloser** and leave appropriate comments and questions. They will be messaged that you have requested clarifications.



5. You may also leave public and private comments, as well as send an email. Public comments are visible to everyone, as are emails, so please be mindful of this. Sending emails also allows the recipient to view the disclosure. Private comments are only visible to users in the review chain, such as a Level 2 reviewer.



6. When you are ready to submit your review (approve or disapprove), click the **Submit Level 1 Review** activity on the left-aligned activities menu. Then, either **approve** or **disapprove**. If you disapprove, you must enter comments. Select OK when you are ready to submit your review.



7. You may also reassign another reviewer. For instance, if you are traveling, you may want to reassign your review. To do so, click **Reassign Level 1 Reviewer**. Then, either type or select the new reviewer and click ok.
NOTE: The new reviewer will have to confirm the reassignment.

