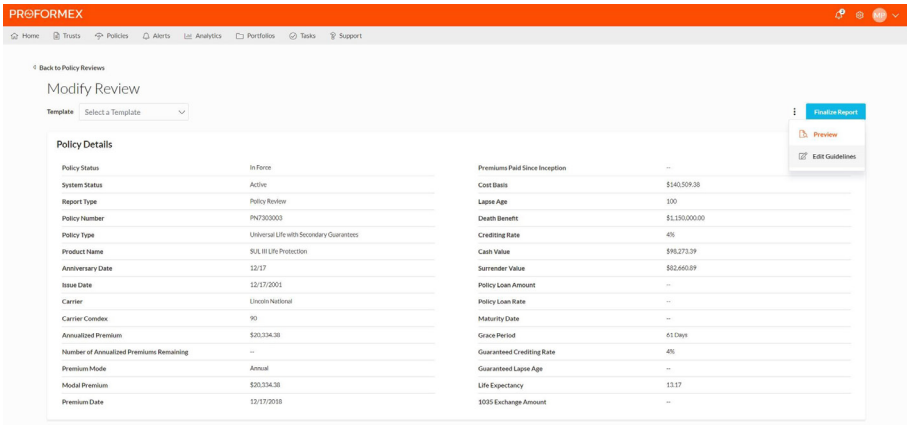
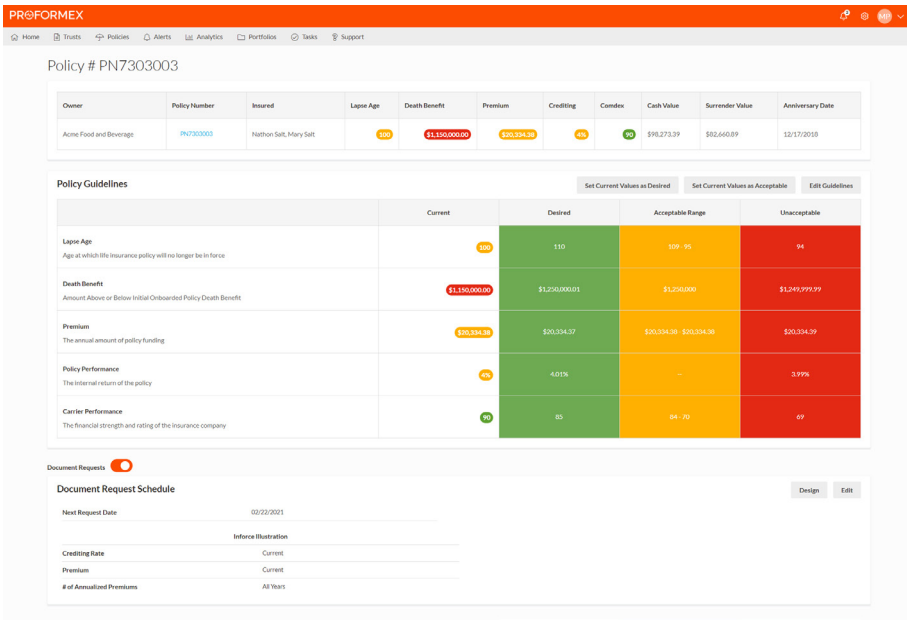
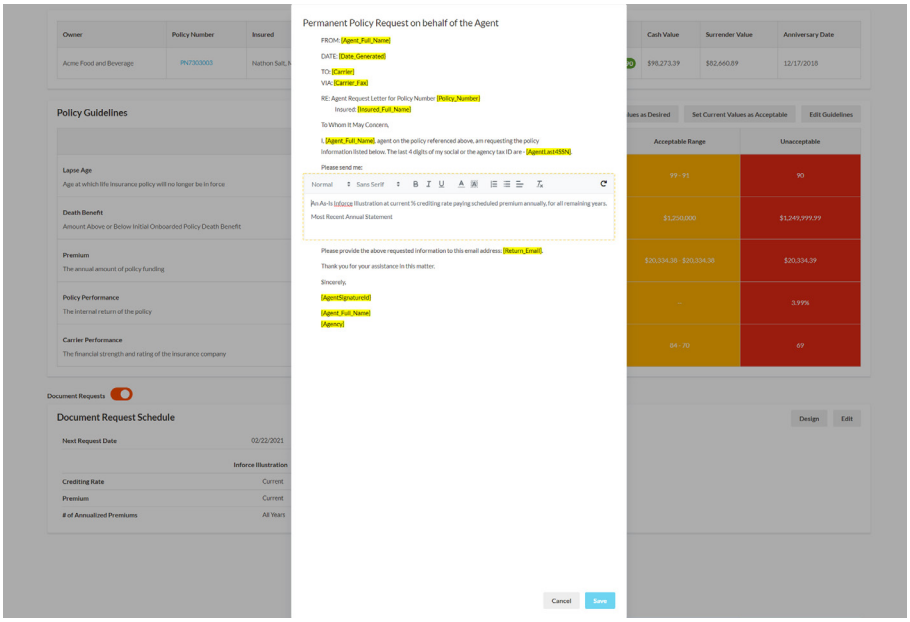
Proformex Best Practices

TOPIC: **SETTING REVIEW PARAMETERS** SUGGESTED CADENCE: **THE BEST PROFORMEX USERS DO THIS DAILY**







To learn more about how to best utilize Proformex, visit www.proformex.com/resources

Setting Review Parameters

- Navigating to Setting Review Parameters can be done from the home dashboard by selecting 'Edit Guidelines' from the 'Action' column of the policy table or from the 'Modify Review' page
- Proformex Best Practice recommends setting review parameters from the modify review page as it can become a step in your review process
- Select 'Edit Guidelines' from the action button icon on the top right side of the page

Set/Adjust Policy Guidelines

- Proformex Best Practice's default guidelines are displayed
- Clicking 'Set Current Values as Desired' will change all lights to green
- Clicking 'Set Current Values as Acceptable' will change all lights to yellow
- Clicking 'Edit Guidelines' will let you manually adjust each of the five tracking parameters independently

Set/Adjust Carrier Requests

- Document Request can be turned off by toggling the slider to the 'off' position
- Selecting 'Edit' will let you change the request date and basic illustration parameters
- Selecting 'Design' will let you override the basic request settings