LEADING CHANGE

Document Exchange Platform
User's Manual

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OCIF
OFICINA DEL COMISIONADO DE INSTITUCIONES FINANCIERAS
Gobierno de Puerto Rico

Truenorth

REGISTER NEW USER

To create a new account:
- Press the **Register New User** button

REGISTER NEW USER

To create a new account (Select Institution):
- Select the financial institution from the menu
- Press arrow below to CONTINUE

REGISTER NEW USER

To create a new account (General Information):
- Enter a **Username**
- Enter a **Password**
- **Confirm Password**
- Enter an **Email address***
- Press the arrow below signaling to the right to CONTINUE

*It is very important to enter the email address __correctly__ given that you will be receiving a PIN number in that address to complete the registration process in the platform.

REGISTER NEW USER

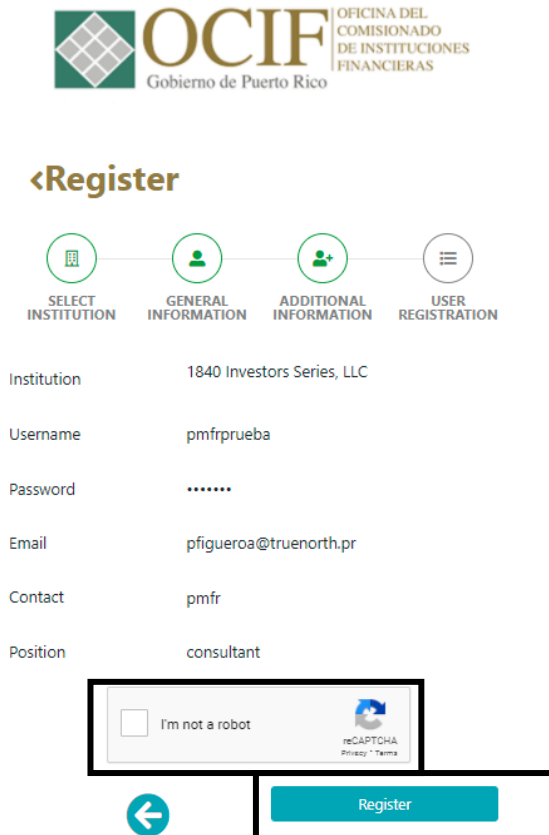**To create a new account (Additional Information):**
• Enter your name in the **Contact** field
• Enter your position within the financial institution in the **Position** field
• Press the arrow below signaling to the right to CONTINUE

REGISTER NEW USER

To create a new account (User Registration):
- Confirm the information entered is correct*
- Confirm the CAPTCHA
- Press the **Register** button

If necessary, correct any errors by pressing the arrow below signaling to the left.

REGISTER NEW USER

A **PIN number** will be sent to the email address you provided.

- Enter the **PIN number** in the first field
- Enter the financial institution's **license number** in the second field
- Press **Validate PIN** to complete the registration*

*If an error message appears, review your entries and press **Validate PIN** again. If the information entered is correct, you will see a message indicating that the user has been created successfully.*

The platform will redirect you to the homepage.

LOGIN

To sign into the platform:

- Enter your credentials (username and password)
- Confirm the CAPTCHA
- Press **LOGIN**

GENERAL INFORMATION
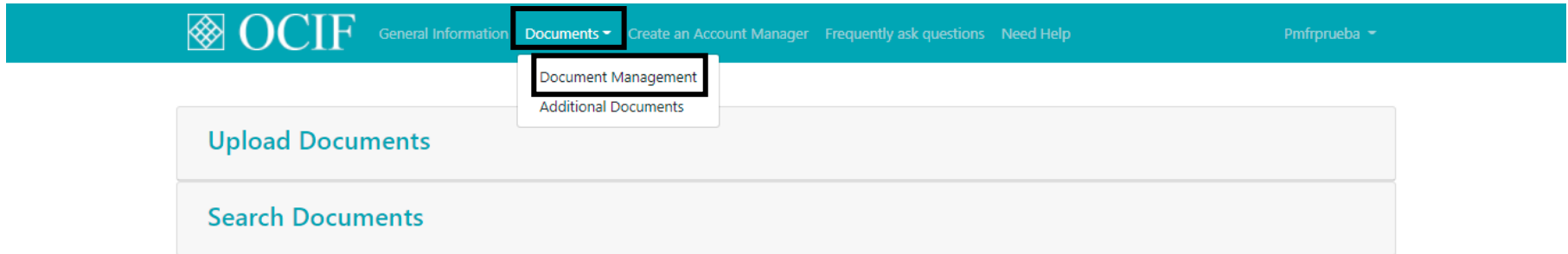
To edit the account's general information:
- Click on the **General Information** tab at the top of the page
- Press the **Edit** button
- Click on the field you want to edit and make the desired modifications
- Press the **Update** button to save the information

DOCUMENTS: Document Management

To upload or search documents that have already been uploaded to the platform:
- Click on the **Documents** tab's drop-down menu
- Select **Document Management**

The platform will go to the Document Management section.

DOCUMENTS: Document Management (Upload)

To upload a document:
- Press the **Upload Documents** accordion
- Select the document category from the category menu
- Select the document subcategory from the subcategory menu
- Press the **Choose File** button
- Select the document you want to upload
- Enter any notes or comments related to the document that has been uploaded (optional)
- Press the **Upload Document** button

DOCUMENTS: Document Management

- If the document is uploaded successfully, you will see a message that reads "The document has been uploaded."
- Press **OK** to return to the **Document Management** page.

DOCUMENTS: Document Management (Search)

To search documents:

- Press the **Search Documents** accordion
- Search by documents' category, subcategory, user responsible of uploaded document, and/or date.
- Press the **Search** button to search documents within the selected criteria
- Press the **Clean Content** button to carry out a new search.

The platform will bring all documents that fall into the selected criteria.

DOCUMENTS: Document Management (Search)

To delete a document:
- Press the **red button** in the Actions column
- Press **OK**

- **To download a document:**
- Press the **blue button** in the Actions column
- Document will download automatically in PDF format

DOCUMENTS: Additional Documents

To carry out searches or upload additional documents required by the financial institution:
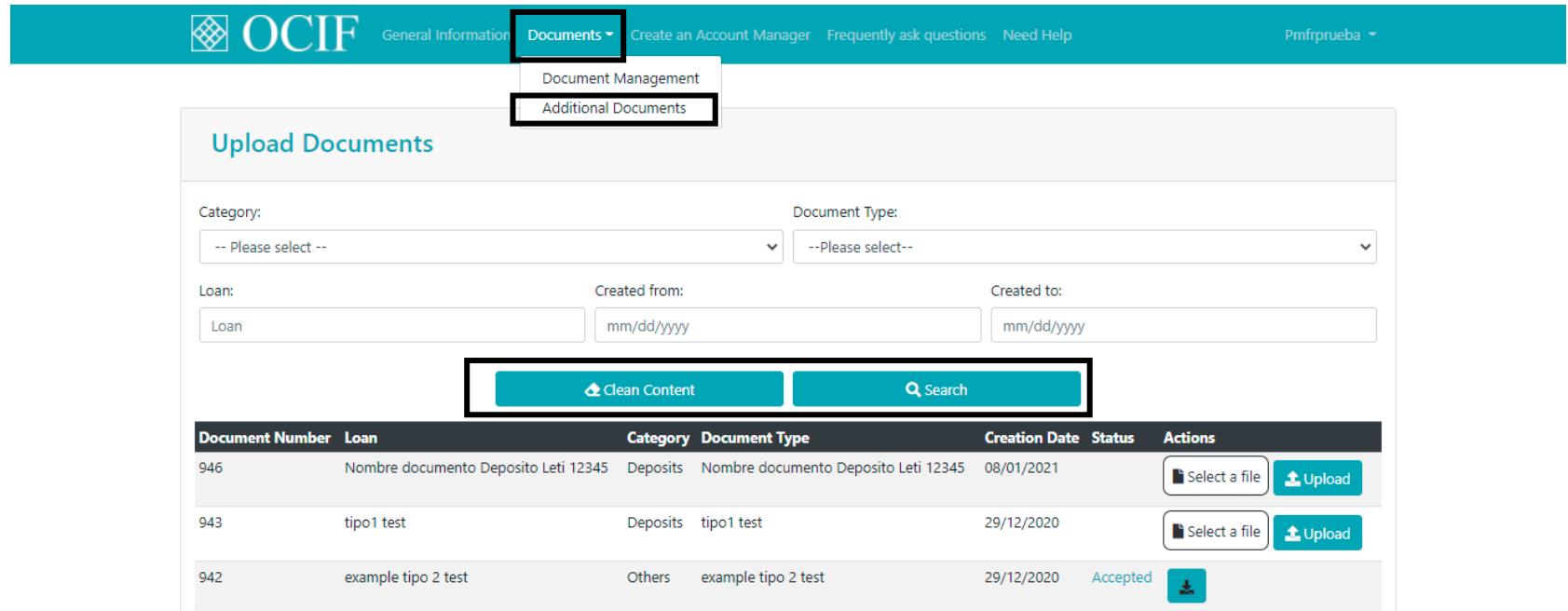- Click on the **Documents** tab's drop-down menu
- Select **Additional Documents**

To search documents in this section:
- Search by document category, document type, loan name, and/or date
- Press the **Search** button to search documents within the selected criteria
- Press the **Clean Content** button to carry out a new search

DOCUMENTS: Additional Documents

The documents that have already been uploaded will have the **DELETE** and **DOWNLOAD** buttons available in the **Actions** column. For the documents that have not yet been uploaded, you will see a **Select a file/Upload** button in the **Actions** column.

To upload a document in this section:
- Press the **Select a file** button in its row
- Select the file from your computer
- Press the **Upload** button to upload it to the platform

Once the new document has been uploaded, the **DELETE** and **DOWNLOAD** buttons will be enabled in the **Actions** column.

CREATE AN ACCOUNT MANAGER

To create an Account Manager user:
- Click on the **Create an Account Manager** tab at the top of the page
- Enter a **Username**
- Enter a **Password**
- Confirm the Password
- Enter an **Email** address
- Press the **Create Account** button to create the new account manager user

FREQUENTLY ASKED QUESTIONS

To access a list of frequently asked questions:
- Click on the **Frequently Asked Questions** tab at the top of the page
- Press each question's accordion to reveal its answer

NEED HELP

To send a question:
- Click on the **Need Help** tab at the top of the page
- Select the reason of the message from the menu provided
- Type your question in the **Message** box
- Press the **Send Question** button

CHANGE PASSWORD

To change the account's password:
- Click on the **Username** tab
- Select **Change Password** from the drop-down menu
- Enter the **Old Password**
- Enter the **New Password**
- Confirm the new password by re-entering it in the **Confirm Password** field
- Press the **Change Password** button

If there are no errors in the fields, you will see a message indicating that the password has been changed successfully. Press **OK** to return to the **Documents** section.

LOGOUT

To end the session:
- Click on the **Username** tab
- Select **Logout** from the drop-down menu

The session will be ended, and you will be redirected to the login page.