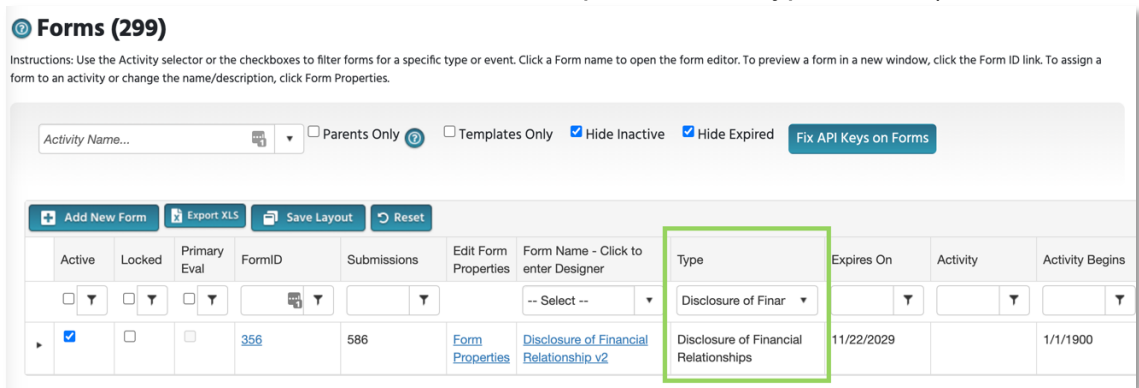


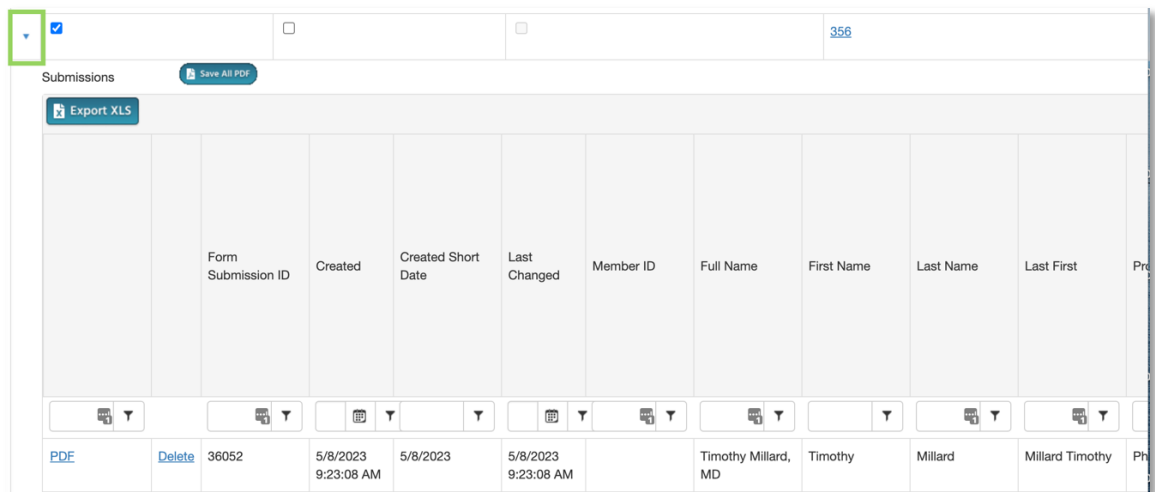
# PDF Retrieval Instructions

We have recently upgraded our server, which has affected your ability to generate and retrieve PDFs for forms in the system, such as the Disclosure. In turn, this has impacted the Disclosure report. However, we can still help you by retrieving copies of the PDFs directly from frevvo. To assist you with this, we require specific information that you can find on the Forms screen or in the Membership Manager.

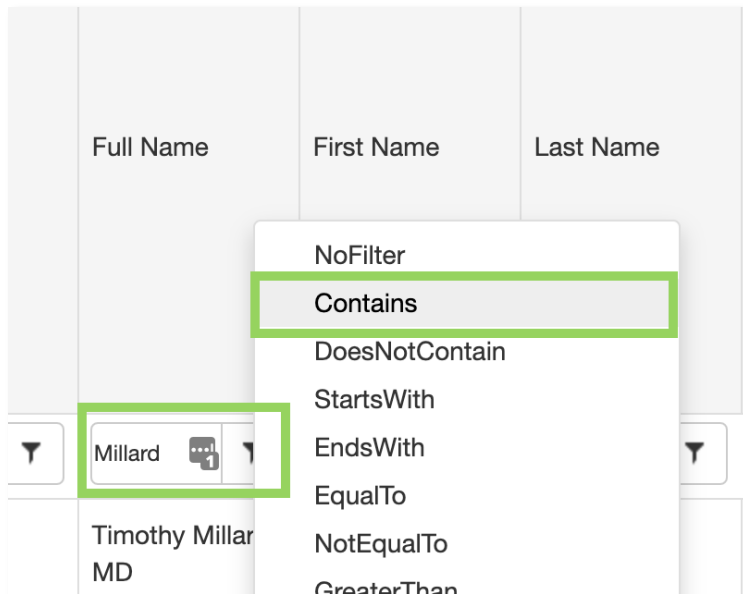
- 1) To obtain a PDF of a form, we need the user's first and last name and their CloudCME User ID. You can locate their User ID by searching for them in Membership Manager or checking the userid column (if available) on the Forms screen.
- 2) We also need the form name and the date and time of the user's last submission. You can expand the form on the Forms screen to obtain that information. Here are the instructions to do so:
  - a. Go to the Forms screen and find your form (to find the Disclosure form you can select Disclosure of Financial Relationships from the Type column):



- b. Click the carat (arrow) at the beginning of the row to expand the form and view the submissions:

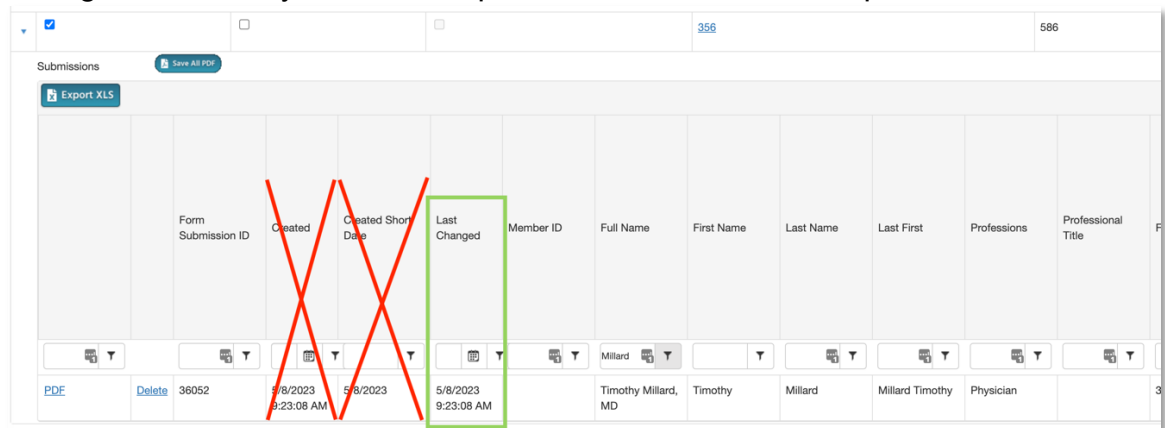


- c. In the Full Name column, enter the user's last name and apply the Contains filter:



If more than one user is returned with that last name, you can enter the user's first name into the First Name column and apply the Contains filter.

- d. Confirm you have the correct user, then copy the date/time stamp from the Last Changed column – you'll need to provide that date/time stamp to CloudCME:



Form Submission ID	Created	Created Short Date	Last Changed	Member ID	Full Name	First Name	Last Name	Last First	Professions	Professional Title
36052	5/8/2023 9:23:08 AM	5/8/2023	5/8/2023 9:23:08 AM		Timothy Millard, MD	Timothy	Millard	Millard Timothy	Physician	

*Note: be sure to copy the Last Changes date/time stamp and not the Created or Created Short Date.*

- e. To request the PDF, please submit a ticket and make sure to include all of the requested information.

If you have any questions, let us know.

Best regards,  
The CloudCME team