Viewing History of Reviewed Docs for Compliance

SUMMARY

Paperless Pipeline helps you stay compliant by keeping a time and date log of every document you review.

IN THIS ARTICLE

1. How to View History of Reviewed Docs for Compliance
2. Download Transaction History

🕐 1:27

How to View History of Reviewed Docs for Compliance

To open the Unreviewed page:

1. **Click [Unreviewed] to access the Unreviewed Docs page.** This page lists all documents across all transactions that need to be reviewed. In a multi-location office, each location may be assigned a different reviewer.

2. **Click on the name of the transaction you need to review.** The transaction will open in a new popup window.

3. **Click a doc to be reviewed.** A quick preview of the document will open.

4. **Once you're ready to mark it as reviewed, click the Reviewed checkbox.** Repeat this process for the remaining docs you need to review.

A time and date log of everything that was done in the transaction is kept in the Transaction History section. This includes broker reviews of documents.

1. **Click [Transaction History] from the left menu of a transaction then hover over the date of any action to see the date and time the action was taken.**

Download Transaction History

In case of an audit, the transaction history can be downloaded along with all documents within a transaction. This provides a complete date and time log of each document's review. To download a transaction's history:

1 **Click [Download Transaction] to start a transaction download.**

🕓	Transaction History
📧	Received Emails (0)
📥	**Download Transaction**
💲	Generate CDA

> If you want to quickly see who reviewed a doc and when, go to the transaction and hover over the doc's icon. The reviewer's name and the date and time of review can be seen here.

ℹ️ Keybox authorization by

Filename: Keybox–authorization–by–.pdf
Pages: 1
Size: 137.8 KB
Reviewed by: Ramu Tremblay on May 4, 2016 at 1:40 p.m. ET
Uploaded by: Monta Fleming on Apr 12, 2016 at 1 p.m. ET