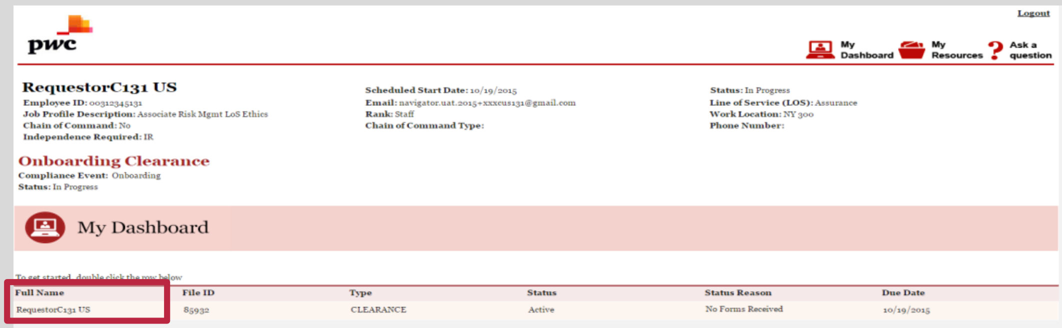
Navigating your clearance

My Dashboard

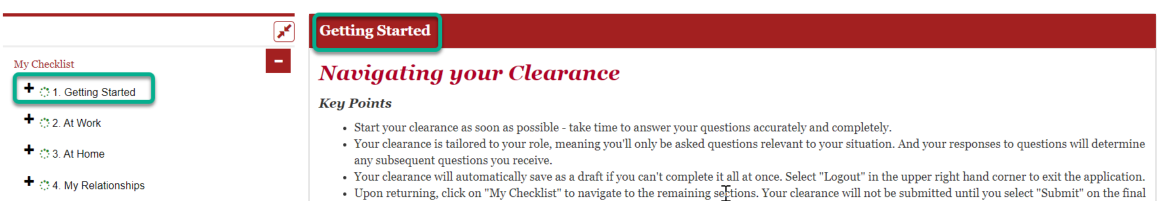
When you first log into PwC's pre-hire clearance system, you will be brought to the **My Dashboard** page. This is the starting point for your clearance process.

Click on your name to begin your clearance process with My Checklist.



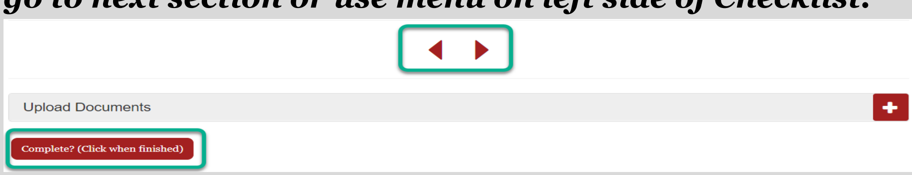
Sections

Once you click on your name, you'll see the **Getting Started** section. To complete your clearance process, you need to review, respond to and mark each of the sections of the **My Checklist** complete.



Each section has multiple pages. You'll only see those sections applicable to your level and role in the firm.

To move between sub-sections, use the forward and backward arrows. Click Complete to go to next section or use menu on left side of Checklist.



Questions or additional resources

From the top right of the screen, you can click on:

1. **Ask a question:** for help and support information
2. **My Resources**: for additional guidance and definitions

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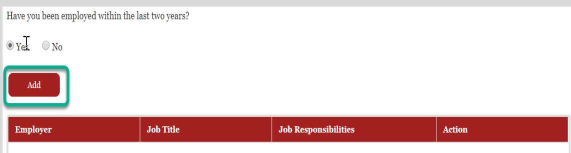
Completing your Checklist

As you complete each section of your Checklist, some of your responses may prompt you to include additional information.

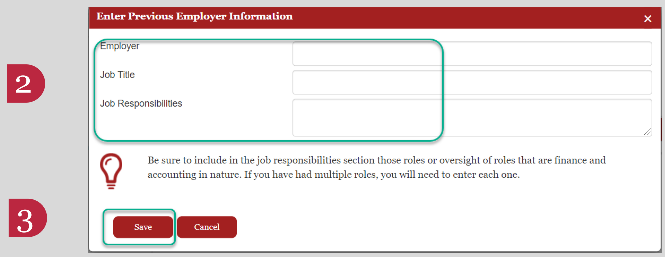
1 Click on the **Add** button when prompted.



2 Type in the information requested in the pop-up screen.

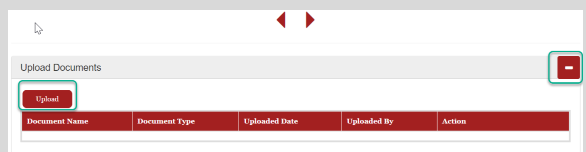
3 Click on **Save**.

Use the **Edit** and **Delete** buttons to modify your responses or delete them.



Upload documents

If you are prompted to upload documents, click on the **Add** button and follow the instructions to locate, upload, and **Save** your documents.



Saving your responses

Save your responses throughout the clearance process. If you cannot complete your Checklist in one sitting, the system will automatically save your responses.

Marking sections complete

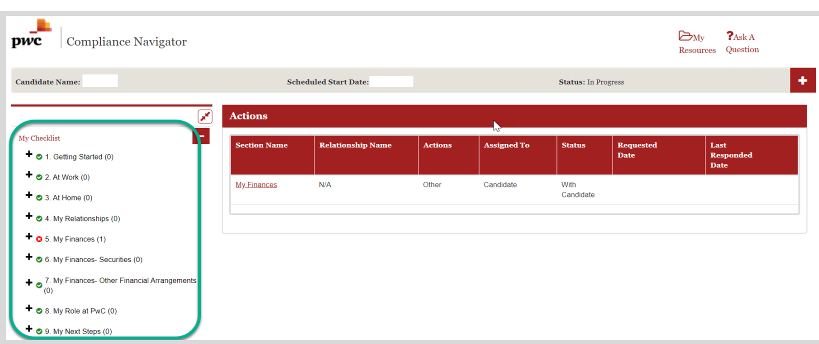
As you finish each section, mark it as complete using the "Section Complete" button (at the bottom of each section). You must mark each Section complete in order to submit your Checklist for review.

Candidate status

To return to where you left off or to view your status in the Checklist completion process, click on **My Checklist** and then look at the **Candidate Status** column.

In the **Candidate Status** column:

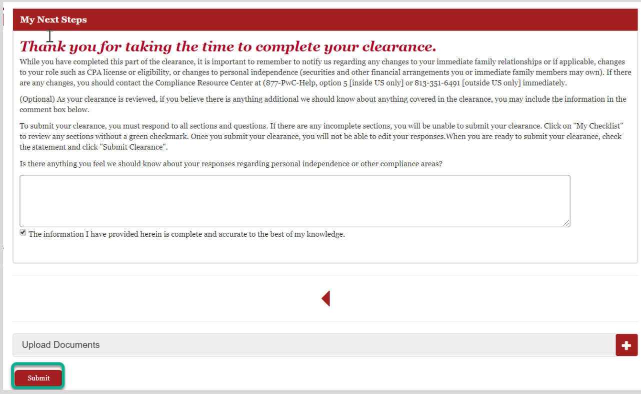
- Green check mark = Complete
- Red x mark = Follow-up needed
- Blank = Incomplete



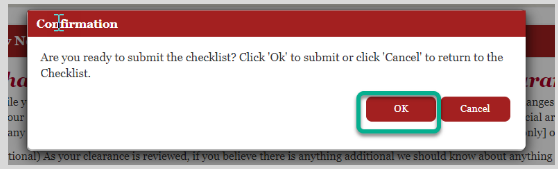
Navigating your clearance

Submit your Checklist

Once you have responded to all of the questions in each Section and marked each of the Sections complete, you can submit your Checklist using the **Submit** button.



Once you click **Submit**, you will be asked to click **OK** if you are ready to submit it or **Cancel** if you need to make changes.



After you have submitted your Checklist

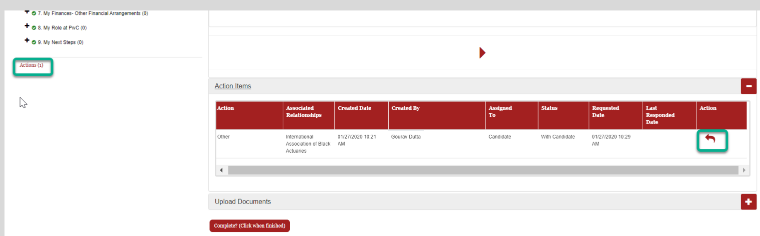
1. ***Look for emails*** from PwC's Independence Clearance team requesting additional information.
   Emails are sent from: pwc.pre-hire.independence.assessment@us.pwc.com.

2. ***Open the emails and follow the links to My Checklist***. From the **My Checklist** section, you'll see your **Action Items** in the **Action Items** column.

Action Items

After you submit your clearance, the Clearance team may have follow-up questions for you. The team will communicate with you via **Action Items**.

1 To view and respond to your Action Items, click on **Action Items** on the left side of the screen.
Click into each item and respond to the Clearance teams requests.
Click **Submit** when done.



Guidance

At the conclusion of the clearance process, you will receive an email confirming that your clearance is completed. It will also contain important guidance for you based on your submissions. It is important that you save this email as a PDF for future reference. You can also see this guidance in the **Guidance** link at bottom left of the screen.