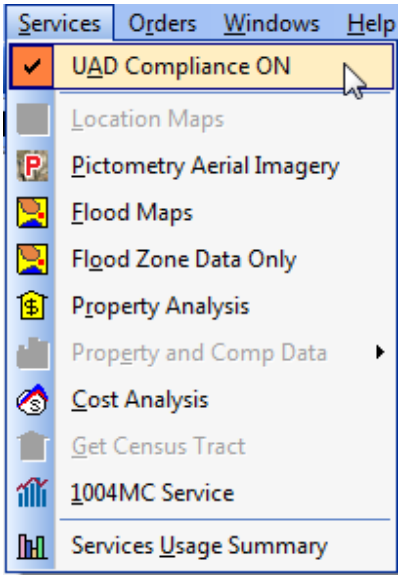
UAD Features and Benefits:

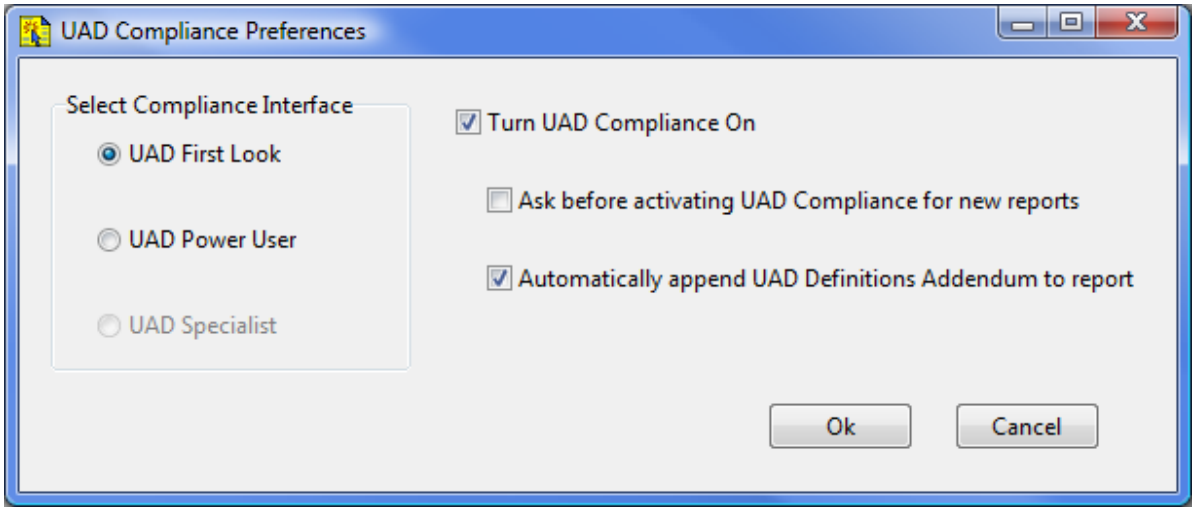
- Convenient color coded cells for all 92 UAD required fields
- Color coded dialog boxes for the top 18 UAD required fields
    - These dialog boxes are included on certain cells so when you enter the data into the cell, ClickFORMS can convert the data into the correct cell format and XML output
- Definition of UAD terms and abbreviations is automatically added to every report
- Convert non UAD reports to UAD format
- Cells with invalid data will be notated by an orange color

To Start a New UAD Report:

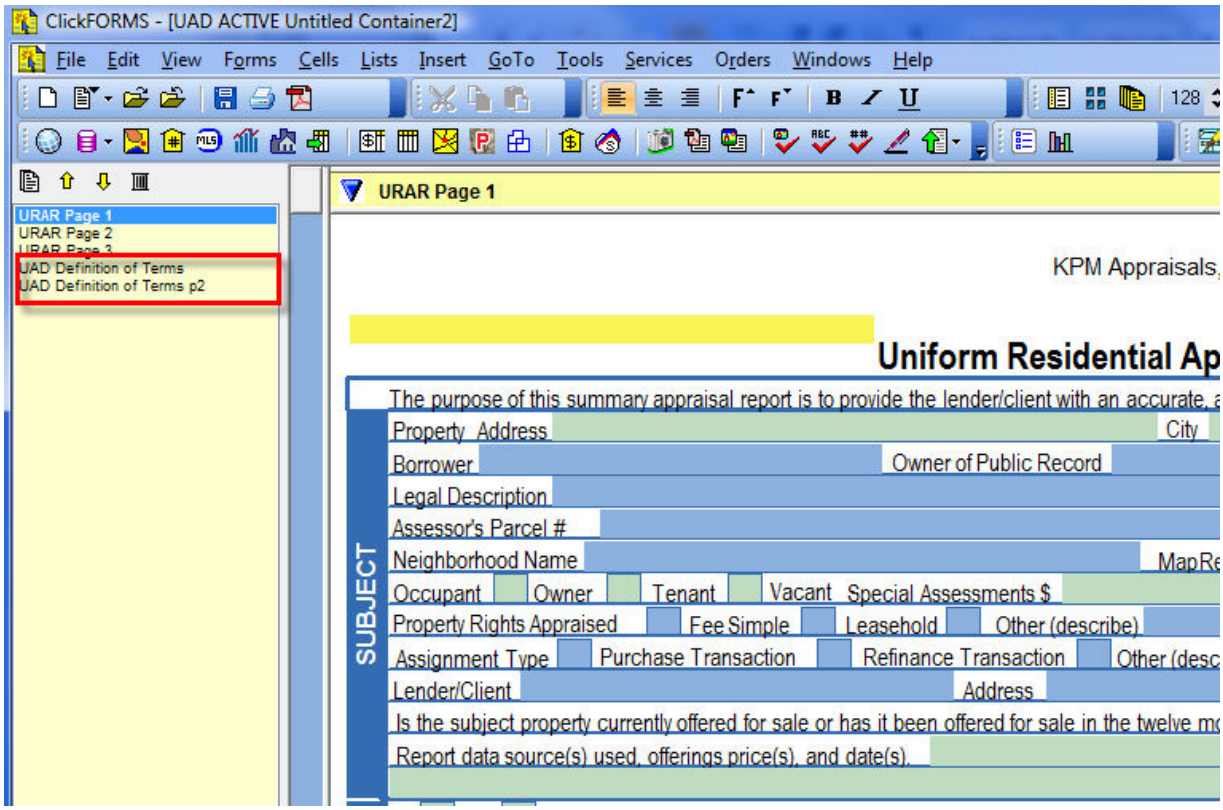
Click on the Services Tab above the toolbar. Click on UAD Compliance to set your UAD Report Preferences.



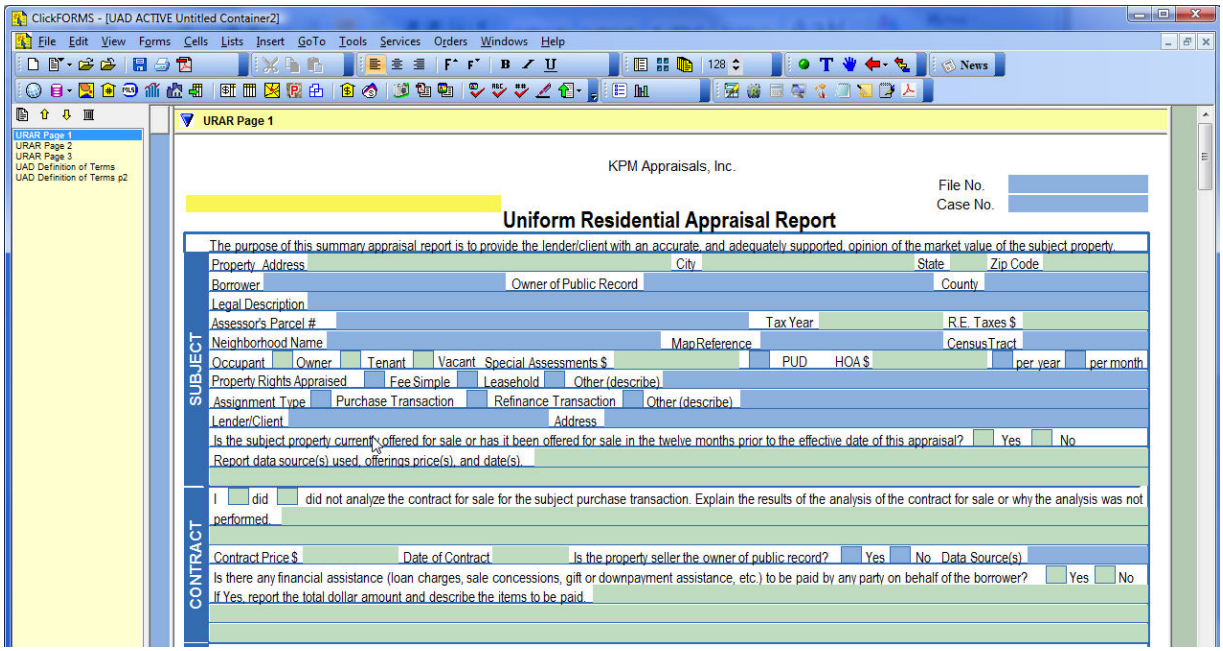
A dialog box will appear, asking you which type of UAD interface (UAD First Look, UAD Power User, or UAD Specialist) you would like to use. You can also chose to be asked to activate UAD Compliance with each 1004, 1073, 1075 or 2055 report you begin. Then select whether to add the UAD Definitions of Terms Addendum to each UAD report. With this box checked, the UAD Definitions of Terms Addendum will be when you close the report. Our recommendations are pictured below.



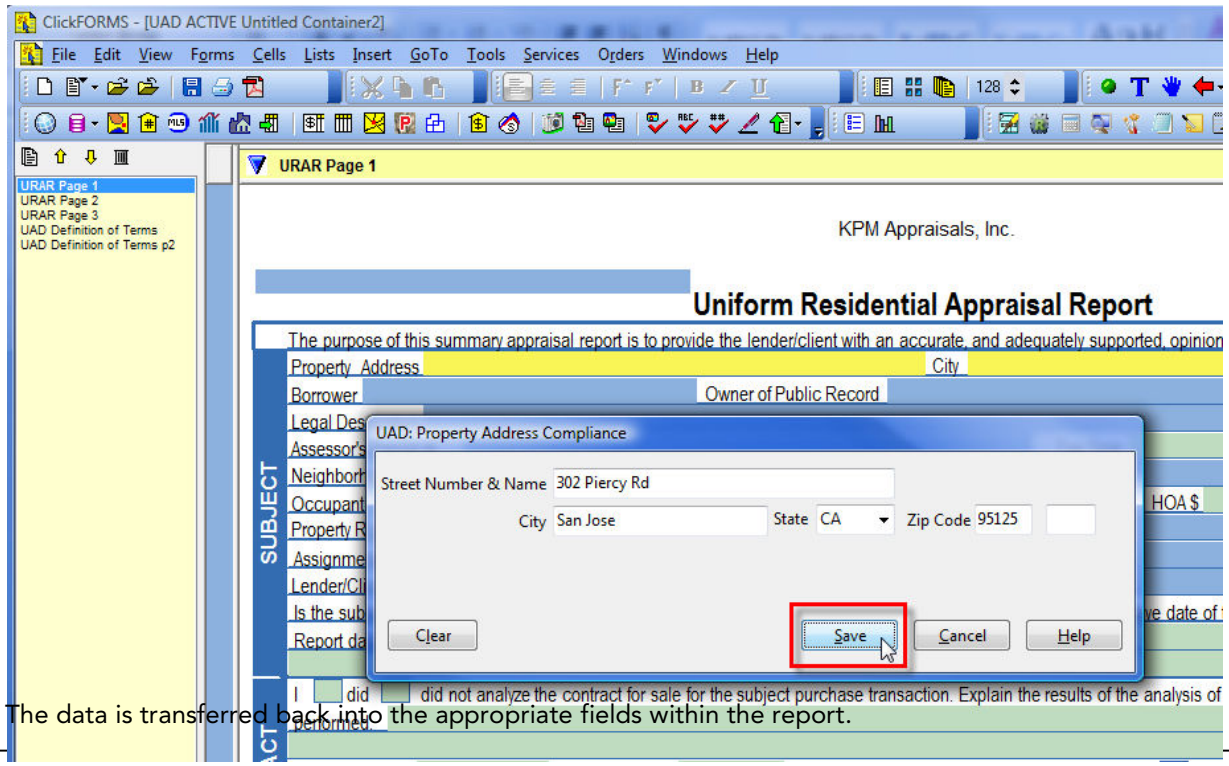
With this configuration, all your new 1004, 1073, 1075 and 2055 reports will open in UAD Compliance mode, and the UAD Definition of Terms Addendum will be added when you close the report.



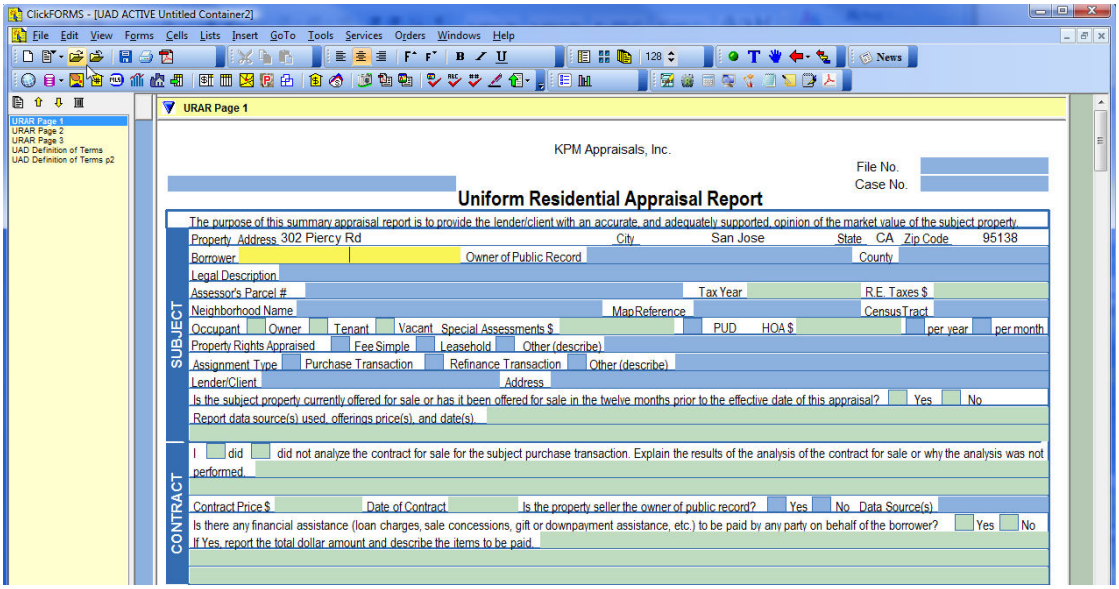
At this point, you may add any forms needed. Once have you added your forms you will notice the green color- coded fields. These are the UAD required fields. Some will invoke a dialog box when you tab or click into them, most will not.



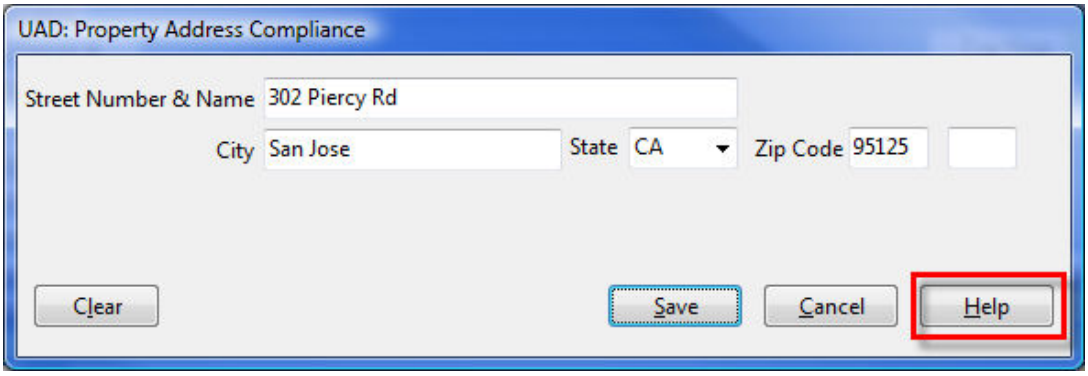
If you tab into, or click on a dialog field, the dialog box will automatically come up. Fill in the required data and click Save.

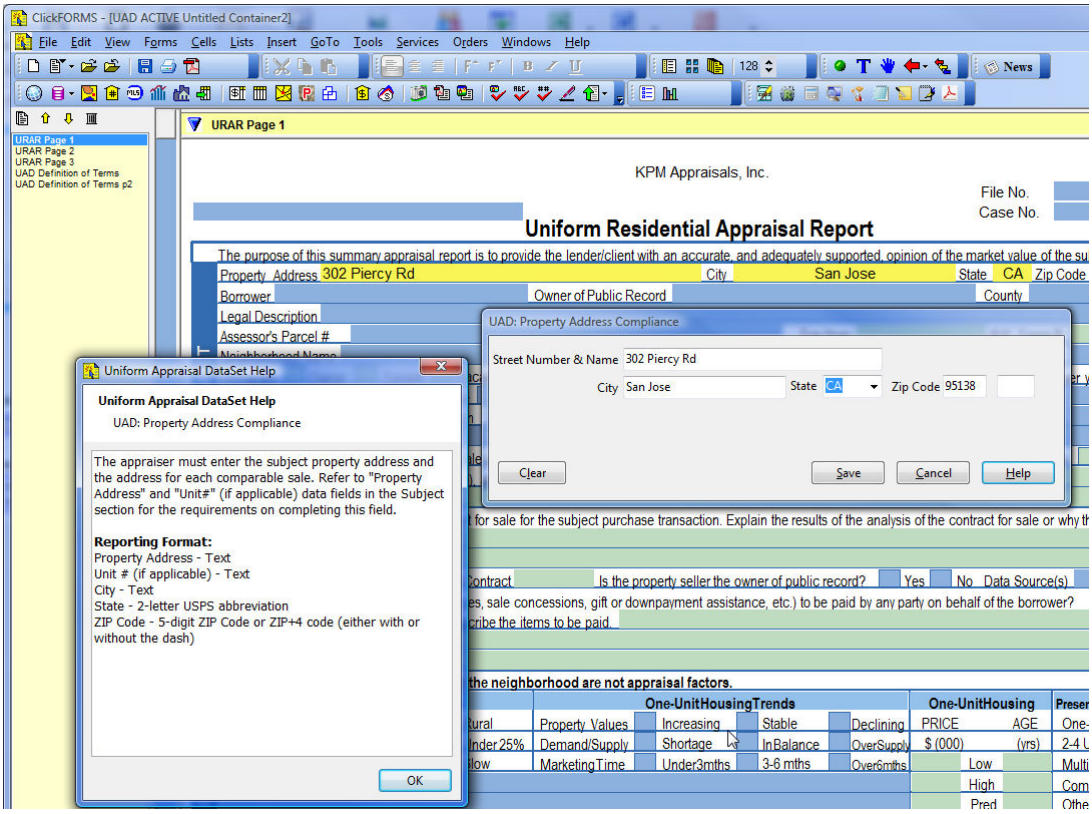
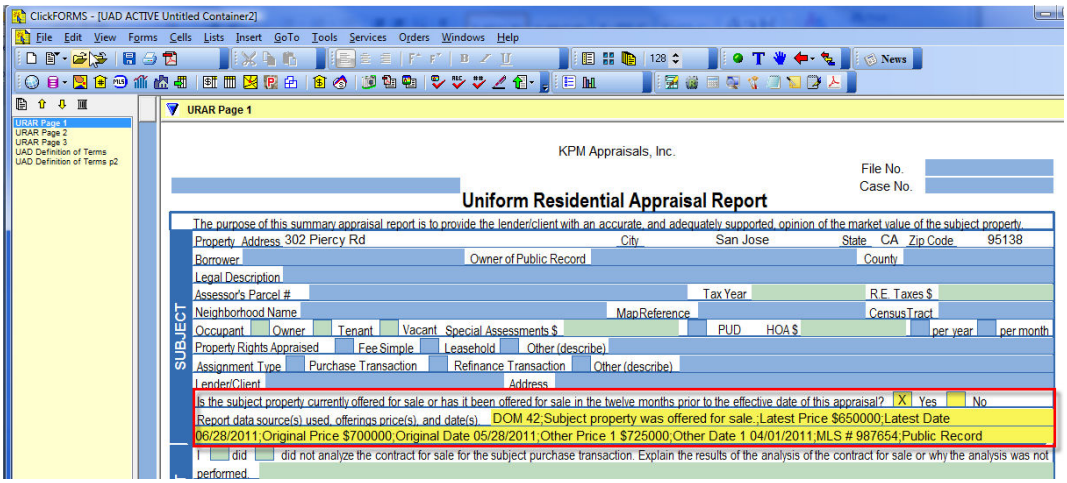


The data is transferred back into the appropriate fields within the report.



On each dialog box there is a help menu option. The help document is specific to each required field and shows the format and requirement for that cell, as directed by the UAD requirements documentation.





Please note the specific codes and formatting entered into the cell after you save the dialog box. Because the UAD requirements are so specific you will not be able to enter data in these cells without using the dialog box. This is to ensure the format and XML requirements are correct before the report is submitted.