Pro-Choice Multi-State Insurance Regulator Collaboration Portal

1) To access the Portal, head to https://cdiconnect.sharepoint.com/sites/PCMSIRC. On the site, you will be able to view announcements, make suggestions, submit questions, and view the calendar for upcoming events. These are accessible via the navigation bar located on the left side of the page as shown in Figure 1. The navigation bar can be accessed on all pages of the website.

1.1) The Announcements can be sorted by Announcement, Body, or Expiration Date by clicking on the Header of any of the three columns as shown in Figure 1.

1.2) To open an Announcement, click on the values under the Header row as shown in Figure 1. Once clicked, a new tab will appear with a detailed view of the announcement as shown in Figure 1a.
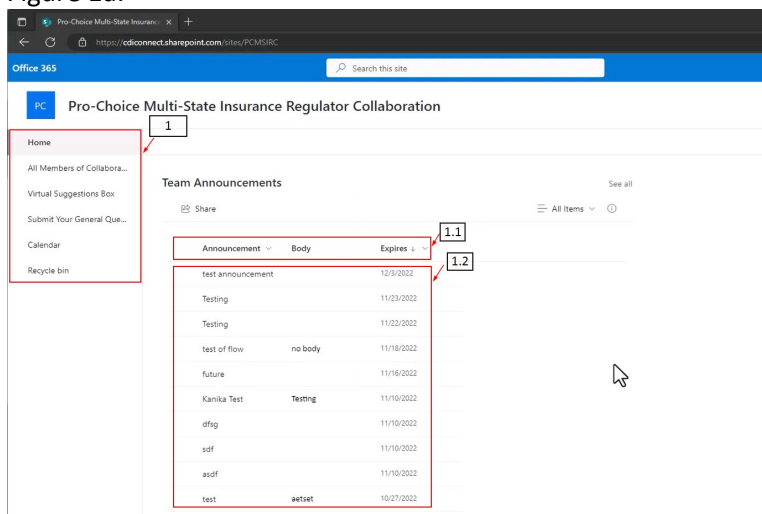

Figure 1 - Portal Homepage

1.3) To go back to the homepage, close out of your current tab or click on "Home" using the navigation bar as shown in Figure 1a.
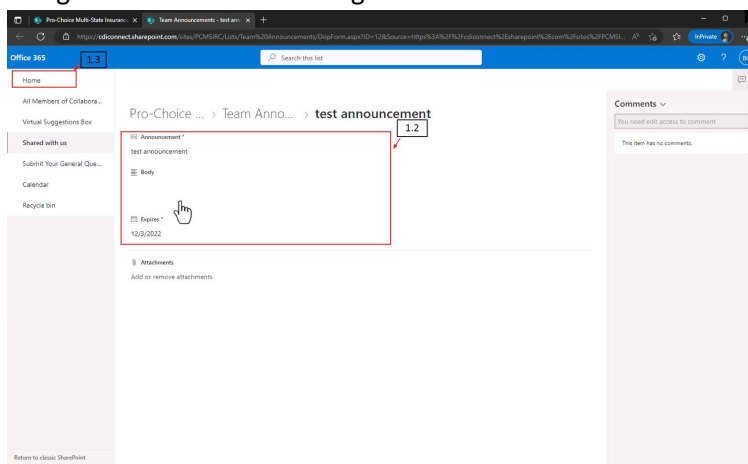

Figure 1a - Detailed Announcement

2) On the Navigation Bar, located on the left side of the Portal, under "Home," is "All Members of Collaboration", which can be seen in Figure 3. This page is used to store all documents uploaded to the Portal.

2.1) These documents can be viewed by simply clicking the document, or downloaded by hitting the three dots that appear when hovering over a file and selecting, "Download" as shown in Figure 2.
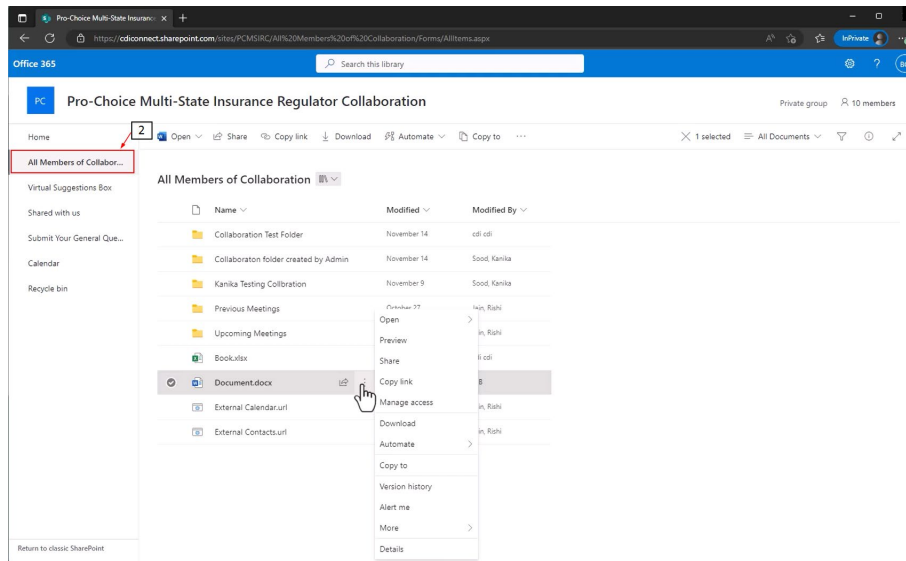

Figure 2 - All Members of Collaboration

3) The next function is "Virtual Suggestions Box" as shown in Figure 3. Here, you will be able to view the history of suggestions you have made.

3.1) To submit a suggestion, click the "New" button and then select "Item" as shown in Figure 3. This will open a form where you will be able to enter your state, category, suggested speaker, and a description of your suggestion as shown in Figure 3a. After hitting save, your new suggestion will be viewable on the Virtual Suggestions Box page. (**Remember that upon saving a new**

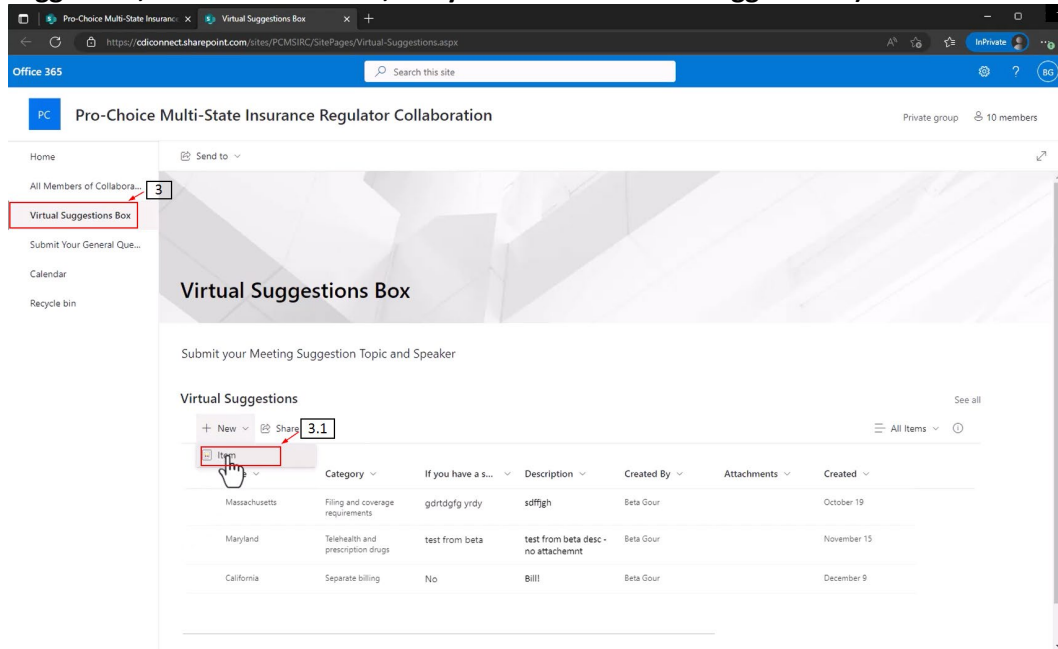**suggestion, it cannot be edited, but you could make new suggestions.)**

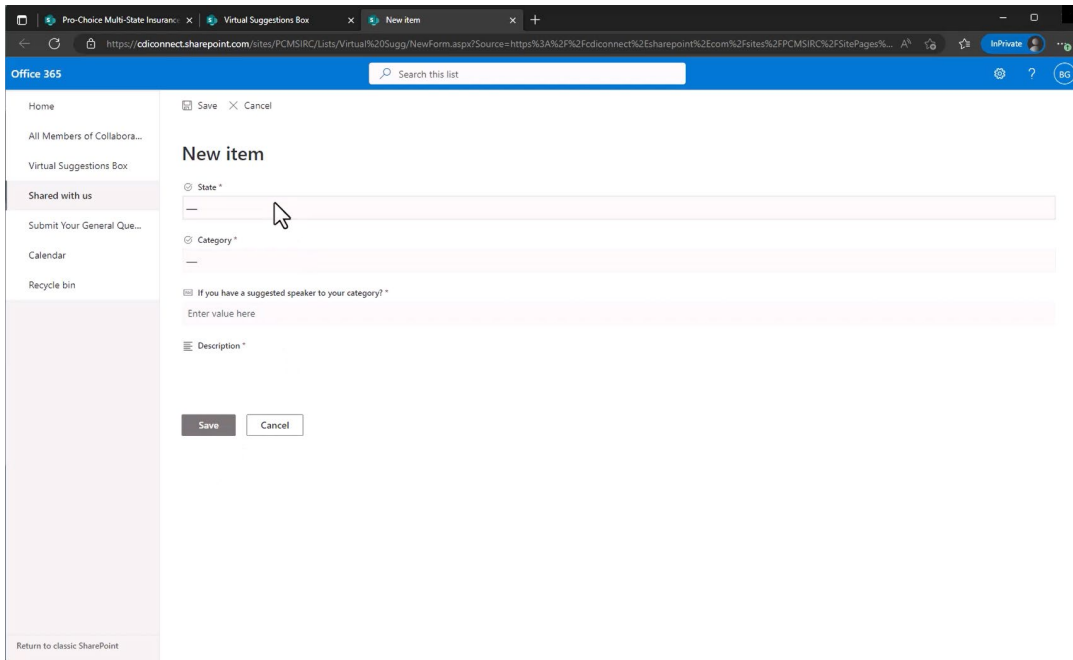*Figure 3- Virtual Suggestions Box*

Figure 3a - Virtual Suggestions Box Form

4) Next in the navigation pane is the "General Questions" function, as shown in Figure 4.

4.1) To submit a question, click the "New" button and then select "Item" as shown in Figure 4. This will open a form where you will be able to enter your state, category, and a question as shown in Figure 4a. After you click save, your new question will be viewable on the General Questions page.
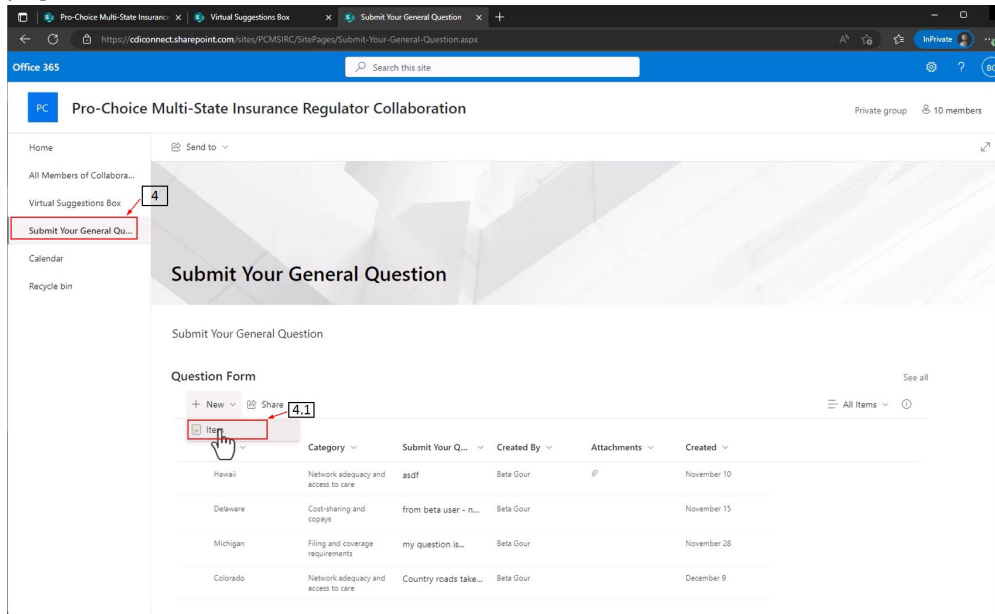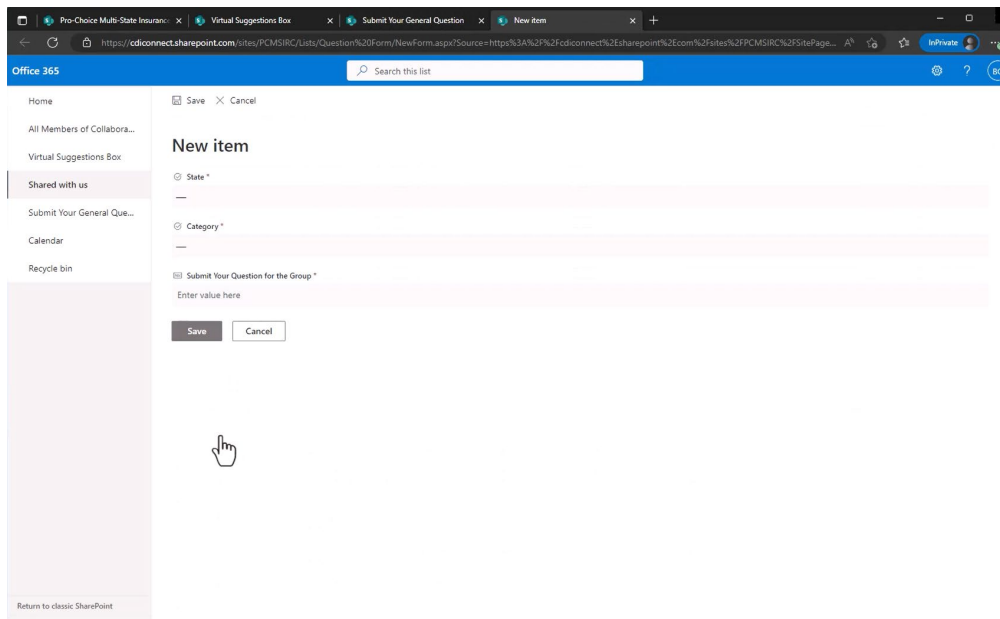

Figure 4- Submit Your General Question

Figure 4a- Submit your General Question Form

5) The final function is the "Calendar" as pictured in Figure 5. This page will show upcoming events and notable dates as shown in Figure 5a. (**Please disregard any message saying "Unexpected Response from Server".)**

5.1) To find out more about an event, click any event shown in Figure 5a. Once clicked, you will see more details about the events shown in Figure 5b.

5.2) To go back to the homepage of the portal, use the "Home" button found on the navigation bar on the left side of the page shown in Figures 5a and 5b, depending on which part of the site you are on.
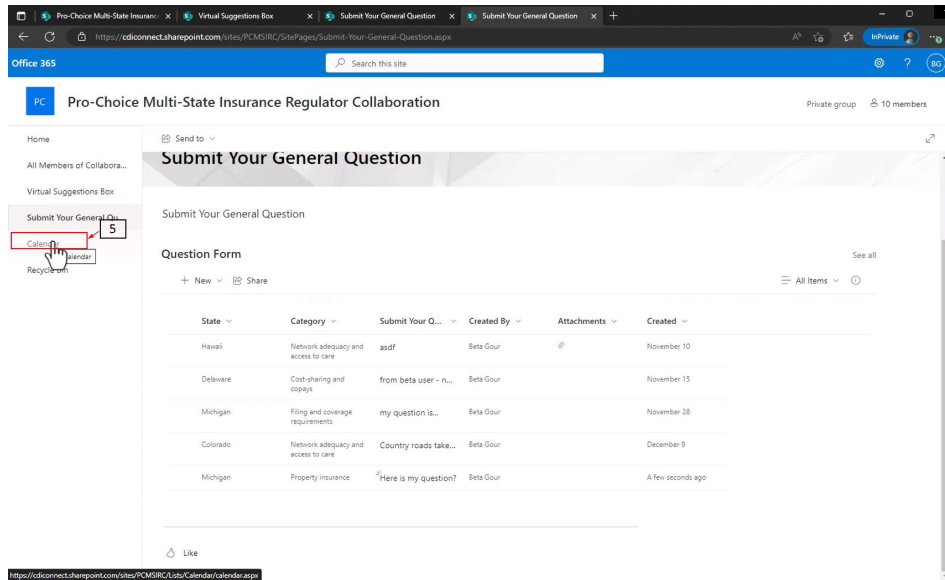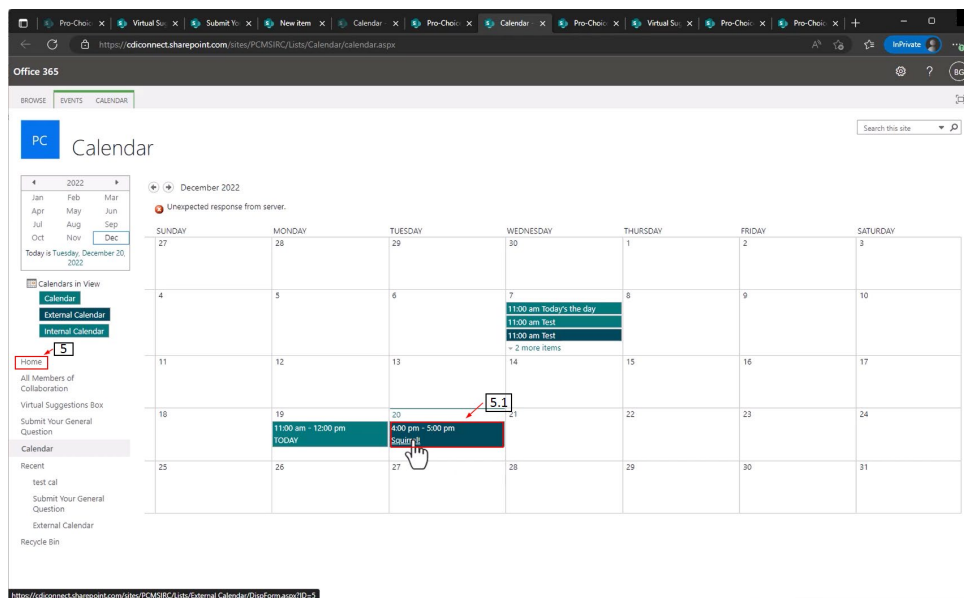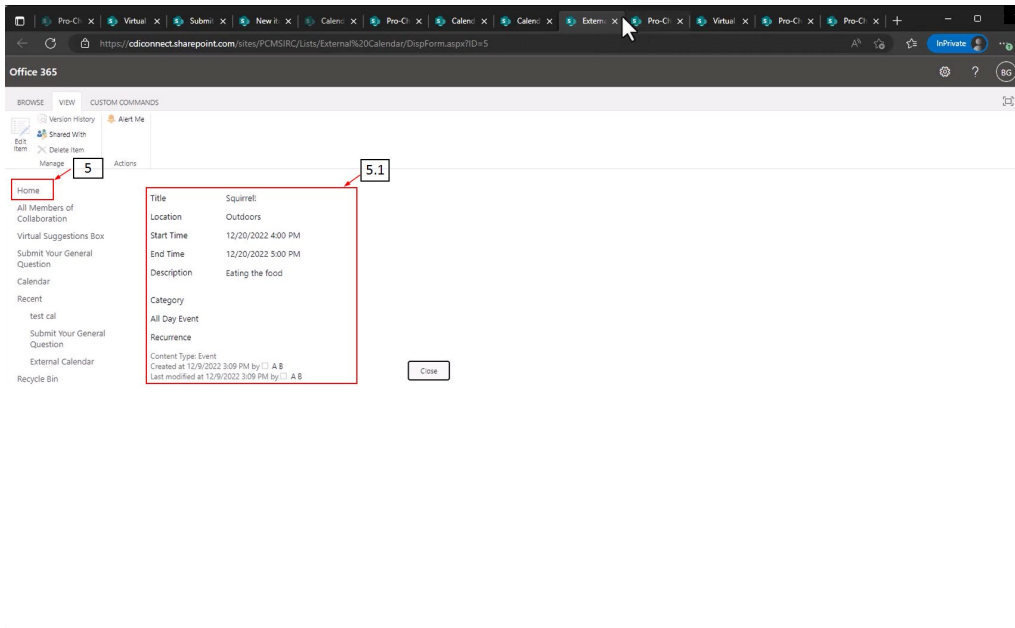

Figure 5- Calendar Tab

Figure 5a - Calendar Page

Figure 5b - Event Details