

6.6 Introducing Risk in Pascal Onboarding

With Pascal's 6.6 update, we introduce Risk in Pascal Onboarding. New and existing forms can be updated with adding risk levels to answers in questions, when this feature is available in your environment. A weight value can be set up for the risk levels and the overall client risk is calculated based on breakpoints.

How It Works

1

Adding risk to questions:

Navigate to the Forms page and select an existing form you would like to update with risk. Question types which have preset options, have the toggle Assess risk present to enable. Among these are True/False, Drop down and Country selector. The Country selector question uses the Country risk profile set up in the Risk classification Settings. When the Assess risk option is turned on for the question, desired risk levels can be chosen beside the preset answers.

The screenshot displays the 'Forms' page in the Pascal Onboarding system. On the left, a sidebar shows 'Example form' with a 'Rename' button and an 'Add section +' button. The main area shows 'Section 1' with a 'Rename' button and an 'Include description' toggle. Below this, a 'Drop down' question is configured. The question text is 'Example question'. The 'Assess risk' toggle is turned on. The answer options are listed as A, B, C, D, and E, each with a corresponding risk level: 'Very low risk', 'Low risk', 'Moderate risk', 'High risk', and 'Very high risk'. The risk levels are color-coded: green for 'Very low risk', light green for 'Low risk', orange for 'Moderate risk', red for 'High risk', and dark red for 'Very high risk'. There are also icons for adding and deleting answer options.

2

Setting up weight values and breakpoints:

Navigate to the Onboarding Settings and within the Risk card press the Edit

button. Here, the values of all risk levels can be customised. The Breakpoints section lets you customise when a client onboarding will be deemed a certain risk level, based on the sum of all answered risk questions.

Risk

Design a risk profile and assign values to evaluate risk.

Risk classifications

Assign a value to each risk. Use the form builder to link risks to each answer option.

Very low	Low	Moderate	High	Very high
5	7	12	20	28

Breakpoints

Sum individual scores to calculate a total score and define the overall risk.

Risk	Minimum value	Maximum value
Very low	No minimum	50
Low	51	100
Moderate	101	150
High	151	200
Very high	201	No maximum

Cancel

Save

How It's Beneficial

- **Flexibility:** Ability to customise the risk levels of questions, the values of risks and the overall client risk based on summed values.
- **Efficiency:** Integrated within the client onboarding, determine the risk of the client.

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