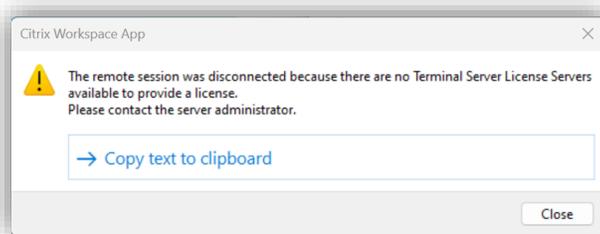
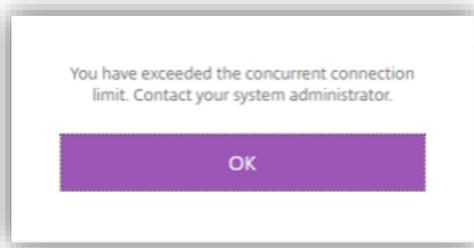


Things to note when starting to record:

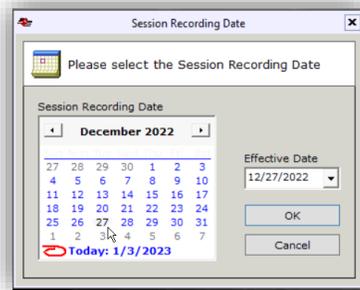
1. The first time you login to Citrix and to each of your applications, you will likely experience slowness. This should only occur the first time you open the applications. Afterwards, you should experience normal loading times.
2. You may encounter images that are not on file. This is to be expected, as thirteen percent of the total images stored are being validated.
3. If you are not receiving eRecordings, please contact the eRecording vendors with which you are working to inform them that you are able to receive documents from them. If the vendor confirms transmission, please contact Cott Support so we can assist you further.
4. If you receive one of the following messages periodically, please acknowledge the message, log out of Citrix and log back in after a few minutes. You will be able to proceed. This is a temporary situation that we are working to resolve.



If you have not manually recorded documents during the outage:

1. You may begin recording documents through receipt entry.
2. Viewing the Image Reconciliation Report, you can determine the last recorded number by series.
 - a. Navigate to Reports -> Imaging -> Reconciliation Report
 - b. Select the following option under Report Filters: Filter by Index Type and File Date
 - c. For Report Criteria
 - i. Index Types = All
 - ii. From and Thru Dates should include the last day you performed indexing.
 - d. The report will show the last numbers recorded for each index type.
3. **The next document number and book/page will assign automatically for you. However, if your file number series includes a year, it will restart to 2023 after the first receipt (or document entered through Load Workgroup) is recorded for 2023.**

- a. In order to avoid assigning a file number and a receipt number with a 2023 prefix, to a 2022 document, it is **essential** to set the Session Recording Date and Effective Date in 2022, for which the documents should be recorded when beginning each receipt session. **This includes eRecordings that should be recorded with a 2022 date.** You must exit the Receipt entry and re-initiate the screen if you want to adjust the recording date.
 - i. Below is a sample of a recording date of 12/27/2022



- b. Only after ALL recordings are entered for 2022 should you start receipting for dates in 2023.
4. After document numbering is assigned, indexing and scanning can happen in any order.

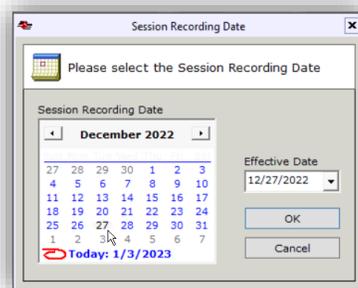
If you have manually recorded documents during the outage:

1. Gather information (documents and manual records) for the items recorded.
2. You **must** re-enter documents in the same order manually recorded to keep the same book/page and file number series.
3. Viewing the Image Reconciliation Report, you can determine the last recorded number by series.
 - a. Navigate to Reports -> Imaging -> Reconciliation Report
 - b. Select the following option under Report Filters: Filter by Index Type and File Date
 - c. For Report Criteria
 - i. Index Types = All
 - ii. From and Thru Dates should include the last day you performed indexing.
 - d. The report will show the last numbers recorded for each index type.
4. If there is a gap of numbers between the last entered document in Resolution3 and the first document manually assigned, you may correct that by creating a gap instrument for each numbering series.
 - a. Navigate to Indexing -> Load Workgroup
 - b. If you assign only book and page numbers:
 - i. Create one instrument with the number of scan pages that equals the gap. For instance, if the last page of the previous document recorded was page 10 and you started with a page of 20, the scan pages would be 9 (20 minus 10 minus 1 = 9).

- ii. Use your standard process for recording a document that was intentionally blank or voided.
 - c. If you assign only file numbers:
 - i. Create an instrument for each file number in the gap. For example, if the last page of the last document recorded in Resolution3 was 2022-10, and you manually started with page 2022-20, create 9 documents (20 minus 10 minus 1 = 9).
 - ii. Use your standard process for recording a document that was intentionally blank or voided.
 - d. If you assign both book/page and file numbers, consider the above steps to ensure that both series are correct.
5. For each day's worth of documents, follow these steps:

***Note* The next document number and book/page will assign automatically for you. However, if your file number series includes a year, it will restart to 2023 after the first receipt (or document entered through Load Workgroup) is recorded for 2023.**

- a. In receipt entry, ensure the session recording date is the correct recording date. Change the effective date to the same date. **It is essential to ensure that all recording dates are set to a day in 2022 until all records from last year are entered.**
 - i. Below is a sample of a recording date of 12/27/2022



- b. Make certain to enter all indexed documents in the **exact** order with the correct number of scan pages to maintain your numbering series.
- c. You may use the document stamp or cover sheet created with the existing documents for easier scanning later.
- d. It is advisable to have only one person enter receipts for the manual records to ensure the documents are saved in the correct order. Non-indexed receipts could be done on another station as long as the receipt number order is not of concern and the recording date is maintained from 2022.
- e. After a day is complete, close out of receipt entry and start with the next day's work.
- f. **To avoid assigning a file number and a receipt number with a 2023 prefix, set the Session Recording Date and Effective Date when beginning each receipt session.** You must exit the Receipt entry and re-initiate the screen if you would like to adjust the recording date.

- g. If you have eRecordings that should be recorded with a 2022 date, accept these recordings AFTER all manually recorded documents for 2022. **Make certain to use the session date and effective date of 2022 for these documents.**
 - h. **Only after ALL recordings are entered for 2022 should you start receipting for dates in 2023.**
- 6. After document numbering is assigned, indexing and scanning can happen in any order.