

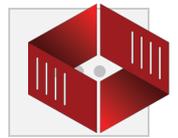
## **Introduction**

This document is our searchable Help/How-To Document. This document contains a detailed description of every page you might encounter on our website, and the abilities and limitations of that page. This document is searchable by pressing Ctrl+F on a PC or Command+F on an Apple Computer. There is also a table of contents to direct your attention.

If you are a new user, we suggest that you take the time to read this document or the sections of it that pertain to you. It will provide you with instructions on basic use of our system. Further information is always available from our Training Team, who can be reached at support@[tracument.com](mailto:support@tracument.com) or 1.888.900.4701.

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## **Login**

We use a standard login portal that should be familiar to everyone. You may encounter the following issues:

-Password Cycle: Your password may need to be changed every 30 days to prevent password theft. You will be prompted to enter a new password if our system detects that you have not changed your password within the last thirty days.

-Account Suspended: An account may be suspended for non-payment (i.e. an EFT returned for non-sufficient funds) or for non-compliance with Tracument's User Agreement. Such a suspension may be lifted only by Tracument personnel after they speak with the owner of the account that has been suspended. Further refusal to pay an invoice or comply with our User Agreement will result in deactivation of an account. If your account has been suspended, Tracument will try and contact the account holder. Alternatively, you may contact Tracument at 1.888.900.4701.

-Account Not Authenticated: After signing up a new account, Tracument must authenticate the identity of the account holder. This process may take one clear business day, but usually takes less. Tracument authenticates the identities of account holders by attempting to reach them through publicly listed methods of communication (telephone book phone number). You cannot login to your account until it has been authenticated.

Login Failed: If you have forgotten your password, please use our password recovery function. If you cannot remember your email address, please contact our registration team at [registration@tracument.com](mailto:registration@tracument.com) or 1.888.900.4701.

## **Signup**

New Tracument accounts can be signed up from our home page, or by following the link in the top right-hand corner of the site. There are two pages required for an account signup: the organization page and the first user page. The firm page is displayed first. Please enter your *firm* details, that is to say those found on your letterhead and which are common to everyone at your firm. You must agree to our User Agreement on behalf of your firm account (which is the master account under which each of your firm's users resides). The second page is for the first user details. Each organization's account must have at least one user and this first user is created here. You will be given the opportunity to create more users once your account is authenticated. Enter your *personal* details here and agree to the User Agreement for your own user account.

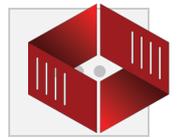
## **The Dashboard**

The dashboard provides easy access to the four services provided by Tracument: Quick Provide, Quick Provide Third-party, Secure Send, and Request Documents. Click on the large buttons to go directly to the appropriate service.

Under each service, there are also links to your activities pages. These links will take you directly to the selected activities page.

## **Activities Page**

The Activities Page is divided in the same way as the Dashboard. The page is divided by items sent and items received for each of the four services. Select the one you wish to work with. This page will display fifty results before moving to a second page. The search function will search only within the current service and sent/received (i.e. Requests Made, etc.). The search function will search for words in any of the fields except the date and the status, and will search all results whether displayed on the current page or not. You can also filter by status while searching. Click the x next to the search box after searching to return to all results. You may also organize the displayed results by any of the headers by clicking on that header.



On the invoices sent, third-party sent, Secure Send sent, requests sent, and requests received pages, you will be able to take actions on items. See the actions section below for what the actions do. To complete the action, select the items you wish to perform the action on in the left most column, then select the action.

### **Activities Page Actions**

The following actions are available on the Activities Page. To initiate the action, select the items you wish to perform the action on in the left hand column, then press the action button.

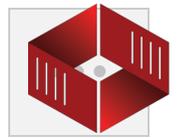
- Invoices Sent
  - Cancel. This will cancel the invoice and it will no longer be payable. This is only available on unpaid invoices. Cancelled invoices cannot be re-opened.
  - Send Reminder. This will send a reminder to the person to whom you sent documents. This action can only be taken on an unpaid invoice. The reminder contains the link to the invoice so it is useful if a person loses the original email indicating that documents have been provided.
- Third-party Sent
  - Cancel. This will cancel the invoice and it will no longer be payable. This is only available on unpaid invoices. Cancelled invoices cannot be re-opened.
  - Send Reminder. This will send a reminder to the person who is to pay for the invoice. This action can only be taken on an unpaid invoice. The reminder contains the link to the invoice so it is useful if a person loses the original email indicating that documents have been provided.
- Secure Send Sent
  - Cancel. This will cancel the transfer. The documents will no longer be able to be downloaded. Cancelled transfers cannot be re-opened.
  - Send Reminder. This will send a reminder to the person to whom you transferred documents. The reminder contains the link to the transfer so it is useful if a person loses the original email indicating that documents have been provided.
- Requests Sent
  - Close Request. This will close the request both for the requesting party and the providing party. Use this function to indicate there are no outstanding documents on the request.
  - Cancel Request. This will cancel the request. A communication will be sent to the providing party if the request is In-network, Fax, or Mail. A cancellation notice will be appended to the original request and the original request will be watermarked as "Cancelled". The request will go to pending until sending is confirmed.
  - Send Reminder. This will send a reminder notice the requester. A communication will be sent to the providing party if the request is In-network, Fax, or Mail. A reminder notice will be appended to the original request and the original request will be watermarked as "Reminder". The request will go to pending until sending is confirmed.
- Requests Received
  - Close Request. This will close the request both for the requesting party and the providing party. Use this function to indicate there are no outstanding documents on the request.

### **Statuses**

All of your items will have statuses associated with them. This is what each status means:

Invoices and Third-party Invoices Sent or Received

- Unpaid - The invoices has not been paid for and the documents are not accessible to the receiving party. These invoices can be cancelled.



- Paid - The invoice has been paid for and the documents are accessible to the receiving party. These invoices cannot be cancelled.
- Cancelled - These are invoices which your firm has cancelled. The documents are not available to the receiving party and they have not paid for them.
- Expired - These are invoices that have been paid for but at least 90 days have lapsed since the payment date. The documents on these invoices are no longer accessible.

#### Secure Send Sent or Received

- Active - These transfers are active and the receiving party has access to the documents. These transfers can be cancelled.
- Cancelled - These are transfers, which your firm has cancelled. The documents are not available to the receiving party.
- Expired - These are transfers where at least 90 days have lapsed since the transfer initiation date. The documents on these transfers are no longer accessible.

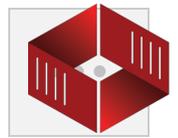
#### Requests Sent

- Open - These are requests that have been sent but for which you have not received documents.
- Pending - These are fax or mail requests that you have submitted to Tracument for sending. Fax confirmations have not been received for fax requests in pending and mail requests have not been sent for item in pending. While an item is pending, no action can be taken on it. Requests will go into pending whenever there is an outstanding sent items on the request, including when cancellation notices and reminder notices.
- Cancelled - These are requests that have been cancelled by the sender. For in-network, mail, and fax requests, Tracument will send a cancellation notice.
- Closed - These are requests that have been closed by the sender. No communication is sent to the document provider.
- Error - These are fax or mail requests that could not be delivered. When you open the request, you will be prompted to decide what action to take next on the request.

### **Making a Request**

Making requests is simple and quick taking the following steps:

1. Navigate to the Request Documents page. Do this by clicking on the dashboard button or on the button on the top navigation bar.
2. Select the recipient organization. Begin typing the organization name you wish to request documents from. This will initiate a search of our database of professionals. If you see the professional you would like to request documents from, select them and their contact information will populate. If you do not see them, use the Add Organization option to manually add the organization. If you wish to edit any of the contact information, that option is available.
3. Fill in the Attention, Regarding, and file numbers fields as appropriate.
4. Select the method of transmittal. There are four options:
  - a. In-network - This will send the request to another Tracument user electronically. They will be able to provide documents and communicate with you directly on that request. A notification will be sent to the email address designated by that organization to receive request notifications.
  - b. Fax - Tracument will fax the documents you upload to this request to the indicated fax number on your behalf. We will automatically create a coversheet for the fax.



- c. Mail - Tracument will mail the documents you upload to this request to the indicated address on your behalf.
  - d. Track Only - The request will be entered into Tracument for tracking purposes only. No communication will be sent to the recipient of the request.
5. Upload documents (Request letters and authorizations). Simply drag a PDF of the documents into the designated area. You can preview and reorder the documents.
  6. Submit. Once you are happy with the request, press the submit button. This will submit the request. Fax and mail requests will go to pending status until the outbound communication is confirmed sent. In-network and Track Only requests will go to open status.
  7. Repeat. Once the request is successfully submitted, a new request form is presented and ready for you to send another request.

### **Working with an Open Request**

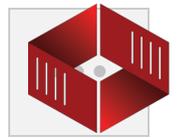
Once a request is open, the sending party, and the receiving party on an In-network request, can work with the request in the request page. This can be accessed through the Activities page or the link provided in the notification email.

There are several actions available to you in an open request:

- Provide Documents. This will allow you to provide the requested documents directly to the requesting party. A drag and drop file widget will appear. Simply drag the documents into the widget, set your price, and submit. A new invoice will be created that is associated with the request that is similar to the invoice created when completing a Quick Provide.
- Print. This will print the request, including events, to PDF. The print function will not print internal notes.
- Close Request. This will close the request both for the requesting party and the providing party. You will be prompted to make a note about why you are closing request. For example, "We have provided/received all of the requested documents.". Use this function to indicate there are no outstanding documents on the request.
- Cancel Request. This will cancel the request. A communication will be sent to the providing party if the request is In-network, Fax, or Mail. A cancellation notice will be appended to the original request and the original request will be watermarked as "Cancelled". The request will go to pending until sending is confirmed.
- Send Reminder. This will send a reminder notice the requester. A communication will be sent to the providing party if the request is In-network, Fax, or Mail. A reminder notice will be appended to the original request and the original request will be watermarked as "Reminder". The request will go to pending until sending is confirmed.
- Send Message - This will send a message to the other party in the request. This is useful for clarifying requests. The message will be posted to the events of the request to automatically track all communication.
- Remind Me - This will set a reminder for you in the future. You will be sent an email by the Tracument system to review the request at the future date specified.
- Internal Notes - This will post a note that people in your organization can see but the other party to the request cannot see. This is useful for noting internal events to the request or recording communications with the other party that occurred outside of Tracument.
- Open Request. This will re-open a closed request. You will be asked to note why you are re-opening the request, such as "Not all documents have been provided on this request.". This option is not available for cancelled request.

Several sections will be available for viewing. These will only be available if they are relevant to the request.

- Files. This section allows you to download any of the documents provided by the requester such as request letters and authorizations.
- Events. This section records all of the events of the request, including requests, provisions, and messages.
- Internal Notes. This section displays any internal notes posted by members of your organization.



- **Related Invoices.** This section provides links to any invoices for provided documents associated with this request.
- **Past Requests.** This section provides links to any other requests with the same file number as the request that is currently open.
- **Related Charges.** This section provides links to invoices for charges related to requesting documents. This will only be visible to the requester and not the provider of documents.

### **Providing Documents**

You can provide documents in two ways: on a request received through Tracument and on a request received outside of Tracument.

To provide documents on a request received through Tracument:

1. Go to the request page. You can get there by navigating to Activities, then Requests Received, and then selected the appropriate request. You can also go to it via the link in the request notification email you will have received.
2. Select Provide Document. Click the Provide Documents button on the right hand side of the screen. An area to drag and drop document will appear at the bottom of the request.
3. Drag and drop documents. Drag and drop the provided documents into the area designated.
4. Specify the cost. Specify the cost and adjust the sales tax as appropriate. You may also add additional costs such as scanning by clicking the Add Additional Costs button.
5. Review and Submit. Review the document provision for accuracy and click submit when you are satisfied.

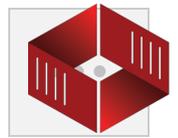
To provide documents on a request received outside of Tracument:

1. Navigate to the Quick Provide page. Do this by clicking on the dashboard button or on the button on the top navigation bar.
2. Select the recipient organization. Begin typing the organization name you wish to provide documents to. This will initiate a search of our database of professionals. If you see the professional you would like to send documents to, select them and their contact information will populate. If you do not see them, use the Add Organization option to manually add the organization. If you wish to edit any of the contact information, that option is available.
3. Fill in the Attention, Regarding, and file numbers fields as appropriate.
4. If the organization is not a Tracument user, you will need to select a security question and enter an answer. The answer should be something that the recipient will know but is not contained in the Re: line of the provision.
5. Fill in any notes as appropriate. The recipient of the invoice will be able to see those notes.
6. Upload documents. Simply drag the documents into the designated area.
7. Specify the cost. Specify the cost of the document in the appropriate field and adjust any sales tax. You can also add additional costs such as scanning by pressing the Add Additional Costs button.
8. Submit. Once you are happy with the Quick Provide, press the submit button. This will submit the Quick Provide. An email notification will be sent to the recipient and they will have access to an invoice that must be paid before they are allowed to download the documents.
9. Repeat. Once the Quick Provide is successfully submitted, a new Quick Provide form is presented and ready for you to send other documents.

[Note: You can set your default invoice settings to include GST and/or PST in your Company Account Settings under the Admin tab.]

### **Working with an Invoice (Quick Provide)**

There are several actions available to you in an unpaid invoice:



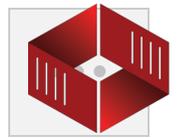
- Print. This will print the invoice to PDF. This is useful if you plan to pay by cheque or need to retain a hard copy for your accounting department.
- Pay Invoice. This will move you to the bottom of invoice where you will be presented with your payment options. You can select the payment method you wish to pay with then click to pay the invoices button.
- Pay by Cheque. This will take you to the instructions on how to pay for the invoice by cheque.
- Cancel. This will cancel the invoice and it will no longer be payable. Only the party providing documents can cancel an invoice. Cancelled invoices cannot be re-opened.
- Send Reminder. This will send a reminder to the person to whom you sent documents. This action can only be taken by the provider of documents on an unpaid invoice. The reminder contains the link to the invoice so it is useful if a person loses the original email indicating that documents have been provided.
- Redirect. If you have sent documents to the wrong party, this function allows you to redirect the documents to a new party. This is cancel the old invoice and move you to the Quick Provide screen. All of the information of the previous Quick Provide will be filled in and the documents will be attached. Simply update the recipient information, review the page, and press submit. This function is only available on Quick Provides to firms not within the Tracument network.

### **Paying for an Invoice (Quick Provide)**

To pay for a document sent to you by Quick Provide:

1. Access the invoice.
  - a. If you do not have a Tracument account, follow the link in the email sent to you. The page you arrive at will prompt you for a password that you will know or the provider will have provided to you. Enter that password. If you have issues with the password, please contact the document provider. This will bring you to the invoice page.
  - b. If you have a Tracument account, follow the link in the email sent to you or navigate to Activities, then to Invoices Received.
2. Pay the invoice.
  - a. By EFT. Navigate to the bottom of the invoice. Select the Discount: Pay by EFT option, then click the Pay This Invoice button. The amount will be deducted from your organization's bank account on the next automatic debit. This option is only available to Tracument account holders. This option also provides a discount on most invoices.
  - b. By credit card. Navigate to the bottom of the invoice. Select the Pay by Credit Card option, then click the Pay This Invoice button. You will then be taken to a screen where you can pay by credit card. Click the Pay With Card option. The screen will then prompt you to enter your credit card information. Once you have entered it, click the Pay button.
  - c. By cheque. Print the invoice and mail it with a cheque for the indicated amount payable to "Tracument Solutions Inc." to the address indicated on the invoice page and printed invoice. Make sure the cheque is sent to Tracument and not the provider of the documents as we handle all payment processing.
3. Download the documents. Once you have paid the invoice, you will have immediate access to the documents. Click on the Download Documents button on the right side to download a zip file of all of the provided documents. Alternatively, click on the document file name to download documents individually. Documents are available for 90 days after the invoice is paid.

Note: Payment will be considered final once you have reached this page. If you receive access to the documents, Tracument must disburse the money we collect on behalf of the providing party. If you wish to see your payment refunded, you must request it from the providing party. Tracument does not assume this responsibility.



### **Providing Documents (Third-party)**

Providing documents using Quick Provide (Third-party) will allow you to provide documents to one party while having another party pay for them. This is particularly useful in transaction such as chart transfers where the patient must pay but the documents must be sent to another doctor. The payor will only see the invoice and the receiving party will only see the documents.

To provide documents using Quick Provide (Third-party):

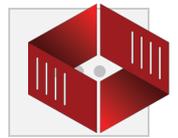
1. Navigate to the Quick Provide (Third-party) page. Do this by clicking on the dashboard button or on the button on the top navigation bar.
2. Select the recipient organization. This is where the documents will be sent. Begin typing the organization name you wish to provide documents to. This will initiate a search of our database of professionals. If you see the professional you would like to send documents to, select them and their contact information will populate. If you do not see them, use the Add Organization option to manually add the organization. If you wish to edit any of the contact information, that option is available.
3. Fill in the Attention, Regarding, and file numbers fields as appropriate.
4. Fill in the payor name and email address. This is the individual or organization that will pay for the documents.
5. You will need to select a security question and enter an answer. The answer should be something that the recipient and payor will know but is not contained in the Re: line of the provision.
6. Fill in any notes as appropriate. The recipient of the invoice will be able to see those notes.
7. Upload documents. Simply drag the documents into the designated area.
8. Specify the cost. Specify the cost of the document in the appropriate field and adjust any sales tax. You can also add additional costs such as scanning by pressing the Add Additional Costs button.
9. Submit. Once you are happy with the Quick Provide, press the submit button. This will submit the Quick Provide. An email notification will be sent to the payor and they will have access to an invoice that must be paid before the document recipient is informed that documents are available for download.
10. Repeat. Once the Quick Provide (Third-Party) is successfully submitted, a new Quick Provide (Third-Party) form is presented and ready for you to send other documents.

[Note: You can set your default invoice settings to include GST and/or PST in your Company Account Settings under the Admin tab.]

### **Receiving Documents (Third-party)**

If you have been sent documents through Quick Provide (Third-party), take the following steps to gain access:

1. Access the transfer.
  - a. If you do not have a Tracument account, follow the link in the email sent to you. The page you arrive at will prompt you for a password that you will know or the provider will have provided to you. Enter that password. If you have issues with the password, please contact the document provider. This will bring you to the transfer page.
  - b. If you have a Tracument account, follow the link in the email sent to you or navigate to Activities, then to Third-party Received.
2. Download the documents. Once are at the transfer page, you will have immediate access to the documents. Click on the Download Documents button on the right side to download a zip file of all of the provided documents. Alternatively, click on the document file name to download documents individually. Documents are available for 90 days after the invoice is paid.



### **Using Secure Send**

Use Secure Send to send documents to other professionals without charging for them. This is particularly useful for sending documents to IME doctors or other litigation support professionals.

To use Secure Send:

1. Navigate to the Secure Send page. Do this by clicking on the dashboard button or on the button on the top navigation bar.
2. Select the recipient organization. Begin typing the organization name you wish to transfer documents to. This will initiate a search of our database of professionals. If you see the professional you would like to transfer documents to, select them and their contact information will populate. If you do not see them, use the Add Organization option to manually add the organization. If you wish to edit any of the contact information, that option is available.
3. Fill in the email, regarding, and file numbers fields as appropriate.
4. If the organization is not a Tracument user, you will need to select a security question and enter an answer. The answer should be something that the recipient will know but is not contained in the Re: line of the provision.
5. Fill in any notes as appropriate. The recipient of the invoice will be able to see those notes.
6. Upload documents. Simply drag the documents into the designated area.
7. Submit. Once you are happy with the Secure Send, press the submit button. This will submit the Secure Send. An email notification will be sent to the recipient and they will have access to the document for 90 days.
8. Repeat. Once the Quick Provide is successfully submitted, a new Quick Provide form is presented and ready for you to send other documents.

### **Receiving a Secure Send**

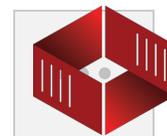
If you have been transferred documents through Secure Send, take the following steps to gain access:

3. Access the transfer.
  - a. If you do not have a Tracument account, follow the link in the email sent to you. The page you arrive at will prompt you for a password that you will know or the provider will have provided to you. Enter that password. If you have issues with the password, please contact the document provider. This will bring you to the transfer page.
  - b. If you have a Tracument account, follow the link in the email sent to you or navigate to Activities, then to Secure Send Received.
4. Download the documents. Once are at the transfer page, you will have immediate access to the documents. Click on the Download Documents button on the right side to download a zip file of all of the provided documents. Alternatively, click on the document file name to download documents individually. Documents are available for 90 days after the transfer is initiated.

### **Filing Grievances**

Tracument is a means of conveying documents from one party to another in a secure and environmentally friendly fashion. In addition, we aim to simplify and modernize the offices that use our service while providing them with the means to reduce the staff time required to transfer and track documents. We offer a robust tracking system and a forum to communicate with counter-parties with regard to requests, invoices, and other aspects of document sharing.

We are, however, not related to, under the control of, or in control of any of our account holders. If you are dissatisfied with the conduct of another account holder, you must approach that account holder directly. Do not attempt to file a grievance with Tracument. We are unable to do anything to help. For example, if you cannot get another organization to respond to your request or invoice, you must contact that organization directly; if you disagree with the substance of a request or invoice, you must contact the originating organization directly; if you have paid for an invoice and the documents provided are not what you requested or expected, you must contact the originating organization directly. We are simply a means of



conveyance we make no guarantees or representations as to the substance or veracity of any communication or action within our system.

However, if you feel an organization is operating outside of the terms of use of our User Agreement, you may lodge a complaint in writing with [registration@tracument.com](mailto:registration@tracument.com). We may, at our sole discretion, impose disciplinary action on another firm by suspending or deactivating their account.

If you feel that your grievance is as a result of a technical problem (i.e. your documents will not download), please contact [support@tracument.com](mailto:support@tracument.com) or 1.888.900.4701 and we will be happy to help you.

## **Account Administration**

This section will explain the functions contained under the Admin tab inside your account. Your Tracument account is set up so that each organization maintains a master account which is not meant to change easily, and members of that organization may set up their own user accounts under that master account. These are more readily changed. This section will go through these items in detail.

### **My User Account**

This page sets your own, personal user details. You will be able to set your name and email address and reset your password. If you possess an admin account, you may demote yourself to a user account by toggling that box off. You may also select which notifications you wish to receive, assuming you are not the notification user. If you are the notification user, you must have an admin name someone else to this position before you may have the option of which notifications you receive. This will be discussed in the next section.

### **Users**

This section is a list of all users and contains widespread editing abilities. It is only visible to admin and owner level account holders.

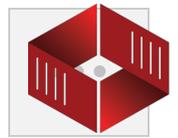
Tracument has three levels of account type. Each firm must have an owner account, who may edit, create, and destroy admin and user accounts. The owner may also see all financial data and all uploaded documents. Admins may edit, create, and destroy other admin and user accounts, but not the owner's account. They may see all financial data and documents that they have uploaded. Users may only see documents they have uploaded, and may only edit their own account details.

In addition to these three levels of account type, one account of any type must be a notification account. This account may not turn off any of their notifications, and may will receive a notification for everything that is done under the master firm account. It is strongly recommended that you create an account at your domain name to handle this position, as it may result in significant email traffic. Creating an email such as [tracument@yourfirmname.com](mailto:tracument@yourfirmname.com) and creating a notification account for this user is our recommended solution. If you wish to delete the notification account, you must first move the notification designation to another account.

To add a new user, click New User and set up the user just as you set up your account on signup. You must set this user's password and provide it to them during this process. If you wish to destroy an account, click the blue Destroy button on the right-hand side of the page and accept the dialogue box. This action cannot be undone. If you cannot see a Destroy button next to an account, the account is either the Owner Account, Notification Account, your own account, or an account which you do not have permission to edit.

To edit any user, you simply click edit and you will be shown the fields you have permission to edit.

### **Company Account**



Under Company Account, which is visible to admin and owner accounts, you may change your company details. If you wish to change the name of your organization or your banking information, you must request such a change from Tracument personnel by clicking on the appropriate link. Your account will have to be re-authenticated.

## Accounting

The accounting section is available to any admin and owner accounts. The section is fairly straightforward. It lists all payments made and all payments received in their respective sections. It will also list all Tracument charges you have incurred. You may search for a specific payment, payments on a specific file, or on any of the headings provided. You may also display a date range, either alone or in tandem with a search. When any search or date range function is performed, the page will total for your convenience. Finally, you may view a GST/HST report. This report shows all sent invoice and subtracts all cancelled invoices for a given period.

Invoices are linked on this page for your convenience.

## Statement of Deposits/Statement of Payments

These pages list your semi-monthly Statements of Deposits and Statements of Payments back to the beginning of your account. They are kept for your reference.

## Final Tips

Some final, summarizing tips for you to consider:

- 1. Collect your documents immediately after paying for them.** Documents are automatically deleted by our system after a period of days and this will prevent you from losing them. If documents you have paid for are removed from the system, please contact the originating firm. They will have been paid, and should be happy to re-send them.
- 2. Take care when addressing invoices and requests.** While all requests/invoices sent to a firm will arrive in their master account, and are therefore visible to all users in that organization, many users work from notifications to their email address and may therefore not see a misdirected request or invoice. Also, the invoice or request notification may arrive in an inappropriate email inbox. They will not be able to access the page on our website, but this will cause confusion.
- 3. Learn to use the Users page under the Admin tab.** Setting up proper user accounts for each member of staff allows them to individualize their Tracument experience.
- 4. Take advantage of the multiple reminders on the Activities page.** This will save time and energy when chasing documents or invoices.
- 5. Take advantage of the quick means of communication with the counter-party on your requests.** Use the External Communication function to send instant messages. Use the Internal Note function to communicate within your firm.
- 6. Close requests once you have provided/received all documents and pay invoices quickly to reduce the number of open/unpaid items in your activities pages.** This reduces the number of things on your to-do list.
- 7. Make use of the search function on the activities page.** This is the easiest way to find something you are looking for.
- 8. Use the Accounting Page under the Admin tab to post your payments on an ongoing basis.**

Please see our Frequently Asked Questions page for answers to many Tracument questions. If you cannot find the information you need, please contact us at [training@tracument.com](mailto:training@tracument.com), [support@tracument.com](mailto:support@tracument.com), or 1.888.900.4701.