

MANUALLY ARCHIVING RECORDS & FILES

Why should I archive records?



Whenever a change is made to the form, either by the organization or by ePACT, we recommend archiving your records so you have a copy of the information your participants submitted before the change. Auto-archiving is available! Click here to learn more!

Just follow the instructions below or visit our Help Center for assistance.

Step 1 Turn off Auto-Reminder

- 1. Go to "Organization Settings".
- 2. Click on Auto-Reminders and ensure "Enable Auto-Reminders" is NOT checked off.

	Organization Settings		
Updates & Reports			
2 Undelivered Messages	View		
17 Members with Files Uploaded	View		
Member Archives	View		

Auto-Reminder Settings

Enable Auto-Reminders

Step 2 Archiving Records

- 1. Click on Select All, followed by Download>Records.
- 2. Click on Download. A PDF of all records will be created.
- 3. Click on Cancel to return to your dashboard.
- \$. Store this PDF on a secure storage drive.

All Methoel Records (03)	Gloups (11) Dis	connected (+)	Autoriators (22)				
Se	arch					+ Add Member	s •
Advanced Search and F	<u>ilter</u> ►						
Select Page Select All				1-50 of 63	Message Members 🗸	Download 🗸	More Actions 🗸
Name	Member ID	Email	Division	Status	Date Submitted Dowr	Records Files	

Step 3 Archiving Files (OPTIONAL)

- 1. Click on Select All, followed by Download>Files.
- 2. Check off the box Types to Download.
- 3. Click on Download.
- 4. Click on Cancel to return to your dashboard.
- 5. Store this zipped folder on a secure drive.

les wi	II be archived in ZIP format
Total	selected members: (3)
Dile	Types to Download:
🧷 Mei	mber-Uploaded
🕜 Org	e-Uploaded
🖌 Imn	nunization
Roc	sk Climbing Waiver
Alle	rgy Plan
Me	dication Instructions
🖌 Bet	navioral Plan
Doc	ctors Reports
Birt	h Certificate
Oth	er

You're done! Please be sure to store these archives in a secure location!



For information on AUTO-ARCHIVING, click here.

For more information, please visit our Help Center or contact us at help@epactnetwork.com 1.855.773.7228.



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