

## **What to Scan and What Not to Scan**

Once your files are set up in the Laserfiche Document Management System, you will be ready to begin adding documents to these files. Although you will be able to scan some document in, you may be asking yourself “What documents do I scan into the system?” This guide should help you answer this question and help you better prepare for the input and use of the Laserfiche system.

First, it is important that you remember to not initially begin a massive input of all the documents you have in your files. To prevent bogging down the system with a lot of users attempting to input all of their files, we will be setting up a schedule for you to input these documents. In addition, one thing to consider is “do I need the space currently in use by the files?” If physical and file space is not a problem, and if the documents will be ready for destruction in the next few years anyway, then you may want to consider keeping the paper files. On the other hand, if you need to access the documents frequently and the search feature will save you a significant amount of time, then plan on scanning these documents.

Once you have determined what you know what you do not want to scan, begin developing a plan to scan in documents. When developing this plan first consider what you need to put into the system. The following list of what to scan and what not to scan may assist you in this effort. Note: This list is not all exhaustive, but instead is provided as a guide for you when considering what to scan.

### **SCAN (or input):**

1. Correspondence, general and administrative for FY-07. This is due to the fact that it will be kept for a few years and you will be accessing it frequently.
2. Personnel files (be sure to use the personnel file guide).
3. Driver records.
4. Program files
5. Student academic records and academic related records.
6. Office procedures
7. Unit notices to employees (general notices for everybody will be scanned in by Administrative Services Offices)
8. Crisis Management Plans

9. Records destruction logs
10. Local press releases
11. Other miscellaneous section one records
12. Also scan in items into sections two and five where you have full access.

**What Not to Scan (of the back files that you currently have):**

1. Payroll related files (EPAs, Forms 500, initial hire paperwork, etc) – You will be getting access to the Master Payroll files input by Payroll.
2. Purchase vouchers – Similar to the Payroll files, you will get access to the master purchase voucher files input by Disbursements.
3. Workers' Compensation documents – Ag Human Resources will input these; however, you will need to check to see that everything you have is in the file for each injury file. If not you will need to scan in the documents and send them to Ag HR.
4. Contract and Grants files – Contracts and Grants will input the master files and provide you with access.
5. Copies of TrainTraq printouts concerning training (the official record is contained in TrainTraq). Also, when scanning in personnel files, do not scan any copies of Drivers Licenses, Social Security cards, Total Compensation Forms, or Benefit Enrollment Forms, as they are not to be maintained in the personnel files – and should not be maintained by the unit.

**What to Scan – New files for files which you have read-only access.**

Guidance on how to process the new files will be provided to you when your unit is notified to officially begin implementing the system to pass the paperwork. At that time additional procedures will also be provided on the initial workflow of documents. As an example, the new hire paperwork will be scanned by the unit as one file with the associated payroll template into the unit work in progress file. It will then be dragged and dropped into the Work in Progress Payroll file. Payroll will then perform its operations and create the payroll file for the person.