

SAMPLE PLAN

Scanned Closed Files Process – Temporary Plan

2001 Closed Files to be Boxed and Shipped Offsite

2002 Closed Files to be Scanned and kept in current cabinet

2003 Closed Files – Attach RED PAPER around file to show the file is closed.

- 2003 Closed Files to be kept in XXXXX for 2003 (with RED PAPER).

Each Scanned Closed File with have COVER SHEET

File Layout:

Billing Side (left) 2	Main Side (right) 1
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Scanning Order:

COVER SHEET

1 MAIN SIDE

2 BILLING SIDE

All Scanned Closed Files will use the same file name format:

CLOSED.FNLast.FNFirst.PetName.date

e.g. **CLOSED.SMITH.John.SponsorName.01.20.2003**

CLOSED.FRANCIS.Mary.SponsorName.01.20.2003

All parts of file (1 & 2) are to be scanned in one file with cover sheet on top (unless file is too big and must be broken into parts).

If file is broken up use the following name format:

CLOSED.SMITH.John.SponsorName.01.20.2003.part1

CLOSED.SMITH.John.SponsorName.01.20.2003.part2

Use **Scanner** for fastest scanning. All files using the Scanner will be saved to XXXXX folder on the XXXXX drive.

After file is scanned and properly named, upload to ONLINE. Scanned file may remain in the XXXXX folder on the XXXX drive. All files uploaded to ONLINE must be less than XXMB in order to be uploaded. Files larger than XXMB will need to be broken into parts.

Login and Password for computer attached to Scanner is:

Login: xxxxx

PW: xxxxx

I have set up a profile in the scanner settings called "XXXX" that I would like everyone to use for the scanning of closed files.

To keep folder and contents secure, be sure to log off computer after each use. DO NOT SHUT IT DOWN.