

DOCUMENT IMAGING PROCEDURES

TO: KPB & KPBSD Directors, Supervisors and Record Custodians

EFFECTIVE DATE: February 8, 2018

NEXT REVIEW DATE: April 2020

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1. Introduction

This document sets forth document imaging procedures for those records that produce a high volume of paper created and/or generated in the normal course of business.

2. Purpose of Document Imaging Procedures

The Records Center does not have adequate space to retain all records in paper format. Archiving voluminous records electronically not only offers a more efficient retention and destruction process, but also offers staff immediate search, retrieval and viewing capabilities.

3. Record Series/Departments Subject to Document Imaging Procedures

ACC-10 Accounts Payable Warrants & Backup – Finance Department
PAY-07 Personnel Timesheets – Finance Department

Additional record series/departments may be added to these procedures if a need is identified. Please contact the Records Manager.

4. Documents Sent to Records Center for Imaging

The records custodians for the departments listed in 3. Record Series/Departments Subject to Document Imaging Procedures, creates entries in the records management software program as defined in the Records Management User Manual created by the Records Manager.

Records staff will digitize the paper records and link the image to the record entry created by the department custodian in the records management software program.

The digitizing process includes scanning, indexing, and optical character recognition (OCR) performed by Records Center staff. Before the paper record is destroyed, a quality check is performed by the records technicians to make certain the digital records' integrity maintains a true, readable copy of the physical document from which it was made.

Once the digital record has been verified and determined that its integrity remains intact, the paper documents are destroyed. See '*Retention Schedule and Destruction of Records*' for destruction procedures.

5. Document Preparation for Imaging

In an effort to expedite the imaging process at the Records Center, and to ensure the best quality of the documents are captured, documents should be prepared as described below.

- Documents are to be submitted on white paper. Color paper does not produce an archival-quality copy.
- Staples, paperclips and bindings are to be removed.
- Small/odd sized documents are taped on a regular sized 8.5" X 11" piece of paper.
- If the document has been folded and no longer lays flat, submit a good-quality, legible copy instead.

It's also good to note that highlighting text on documents makes it difficult to obtain a good image. Consider circling the text with a highlighter instead of over the text to help ensure a quality scan can be obtained.

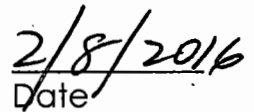
6. Retention Period

Managing retention of these digital records are handled in the same manner as if they were in paper format and adhere to the established retention periods as defined in the Records Retention Schedule. All digital records discussed herein will be considered equivalent to paper records.

The destruction process, as performed for paper records, will include a complete audit trail and destruction report will be maintained by the records manager. See '*Retention Schedule and Destruction of Records*' for destruction procedures.

These procedures supersede any previous procedures issued and approved under KPB 2.52.040.


Wayne H. Ogle, Assembly President


Date