

PFPP RECORDS RETENTION

JULY 17, 2015

6/22/2015 – Left message for Pam Colby with ITD.

6/25/2015 – Left message for Pam Colby with ITD.

6/26/2015 – Sent e-mail to Pam Colby trying to confirm that she had set us up for an appt. in July per our prior discussion, to meet regarding scanning of documents program. Advised I left several messages, no response. Told her a budget was approved by the Board for this project.

6/29/2015 – Left message for Lisa Goldman the other person who sat in on our original conference call trying to obtain information.

7/1/2015 – Finally received an e-mail from Pam Colby setting up an appt. with Usha Mohan with ITD on July 15, 2015 @ 2:-2:30 w ITD on the 9th Floor Conference room.

We are targeting October 1, 2015. That's the date ITD has available for new customers starting this program.

7/15/2015 – Meeting with ITD (Usha Mohan) cancelled at the last minute due to priority request from Sam Mousa with the Mayor's office. To be rescheduled at a later date.

7/16/15 – John spoke with ITD. Further discussion will continue next week. Usha Mohan must approve project before Pam Colby gets involved.

RECOMMENDATION:

I recommend we hire a part time person for filing/scanning of documents to prepare for upcoming records retention program.

- Clean out old files looking for duplication and expiration of existing documents to be purged or put into storage.
- Filing/pulling files for Pension Benefits Manager and other staff as needed.
- Organize correspondence in small Board room to be filed/stored as determined.
- Remove old files in general filing (purge date to be determined) located in the file room.
- Scanning documents into new program prior to implementation.
- Back up for Receptionist while on break/vacation/leave.
- Hours 9 – 1 (to cover lunch)?
- Time frame – one year trial period