

PPPF RECORDS RETENTION

JUNE 19, 2015

6/5/2015 - Called Pam Colby with ITD as I had not gotten a response to my e-mail. She stated she had not contacted the Tax Collector's office to set up a meeting to discuss how their filing system works for them and possibly would work for us.

With so many possibly leaving ITD (she had to turn in her letter of resignation for the new Admin.), she wasn't sure how this would affect the 10 departments they are currently working with to get their filing system completed by June 30th. Now, she also mentioned that there is a waiting list for future departments to be set up. Even if allocated as a project, they probably couldn't start until Oct. 1st if all fell into place with a quote from the vender and payment discussion.

6/5/2015 – Left a message for Michael Love with the Tax Collectors office to call me. (# 630-2993)

6/8/2015 – Looked for other filing system options on line. Possibly Xerox? Sent an e-mail requesting information and possibly a quote via e-mail.

6/9/15 – Michael Love returned my call. They have had the OnBase system up and running for almost a year and they are happy with it. We set up a meeting for 6/11 @ 10am at the Tax Collector's office on the first floor for him to demonstrate.

6/11/15 @ 10am – Met with Michael Love. The OnBase System works well with training and support coming from ITD. Most employees found the training easy. Each person has a desk top scanner to use for a small quantity of documents. For a larger file, such as legal documents (law suits, etc.) they scan in through the main copier and send it via e-mail to be put into the system. (*that's what we are doing now with current documents*).

The system is set up basically like "Word" where you set up folders/files to categorize your filing. The systems go a step further in that you can put in more detailed information regarding the document (who it was from, file #, date received, etc.), so that if you needed to locate a document but had trouble with the category it may be file under, it could still be located with other data. You can even set up a time frame for the items to delete based on records retention. Michael even extended that time frame another 6 mths. just to be safe.

The Tax Collector's office utilized a records retention service to review their files individually off site. They reviewed all of the files and scanned in the documents needed, the saved the information on a disk for the Tax Collectors office to review. Once Michael signed off on the files, the paper files were deleted. The Tax Collectors Office does not keep documents with original signatures. They used to have rooms of filing cabinets – no longer.

One person is designated as the only one that can delete a file and review/correct all of the files. You would also have a person trained as backup.

There are actually two software programs. Unity Client is where the information (files/folders) lives. This is your infrastructure and is set up first. Then you also have the Highland software which I believe is where you get more detailed information regarding the files. Everything is

stored on the "G" drive (shared access) which I believe is backed up by ITD ***need to make sure on backup***

If Pam Colby with ITD returns from vacation and is still employed at ITD, I will contact her next week to discuss obtaining a quote. I believe she said she would go ahead and put us on their calendar to get a quote in July whether or not she returns, so I will follow up.

NOTE: Even if we decide to utilize this system, and they can't actually start set up until Oct. 1st, we will continue to try to organize files with the information that will eventually be scanned in. That's what Michael Love with the Tax Collectors' office tried to do before information was sent to the records retention company (which was an additional expense over and above the ITD software.) Michael organized paperwork by years, I'm not sure that would work for us?? The records retention company from Palm Coast was able to do everything in a timely manner and professionally with a large staff (offsite).
