

PFPP RECORDS RETENTION

FEBRUARY 20, 2015

Filing cabinets in Debbie's office that were filled to capacity, were moved into the new storage room (under construction) adjacent to Debbie's office for access as needed. When the old cabinets were moved out of Debbie's office, the wall had to be painted prior to putting in the new cabinets.

The new cabinets are the filing cabinets that were in Debbie's prior office, which are being emptied and moved into her new office for storage and set up. The move should be complete by next week. These cabinets will free up storage for items in Debbie's office and work can begin to incorporate documents in John's office as well.

In the main file room:

Reorganization has begun to centralize financial statements (in date order), money manager contracts (in alphabetical order), travel records/documents (in date order), etc., so they are grouped together in one location for easy access. These are prior year documents with the most recent kept in Debbie's office for quick access.

Website:

The Restated Settlement Agreement documents between the City and PFPPF have been scanned in and posted on our website with Amendments.

PFPF RECORDS RETENTION

MARCH 20, 2015

The new filing cabinets that were in Debbie's prior office, have been moved into her new office for storage and set up. I have been working diligently to re-organize and set up files and to merge old documents into the files.

Made an appointment with Trustee Schmitt for Wednesday, March 18th @ 1pm to view JSO Central Records and their current and soon to be new filing system.

Wednesday, March 18th I met with Trustee Schmitt and Pam. Their current system thru Oracle was down. They have not actually started working with the new "OnBase" system as yet. This is the same system used by the City for several other City Agencies as well as private companies. Pam and Trustee Schmitt explained basically how the system works and how information is stored by category. OnBase is working with them to have the new system set up the same way information is archived now for easy accessibility and they are merging documents into the new system.

Contact person for OnBase is Pam Colby. I will contact her to obtain further information regarding this system and the cost associated with this for the Pension Fund.

I am scanning in important documents as they are reviewed and/or filed and hopefully, this can be converted into the new system when implemented. The OnBase system may be a good system to obtain since they are already working with JSO and other City Agencies with their records database. The City supports this system with training and problem solving.

Please let me know if there are other systems that need to be looked into.

WEBSITE:

Information is updated daily as received.