

PFPF RECORDS RETENTION

MAY 21, 2015

4/30/2015 @ 3:30pm - Conference call with Pam Colby and Lisa to discuss our filing needs, what we wish to accomplish, and what type of documents we have to store. Some systems use "keywords" for filing and others may use category. They help to get the right program for our needs.

They are currently working with approx. 10 departments. Based on our conversation, probably the best program for us would be the one used by the Tax Collector's office. She is going to set up a meeting with Michael Love at the Tax Collector to show me how that system works for them, hopefully prior to our May board meeting.

ITD has a team that works on the appropriate model for our needs, helps with training, problem solving, and maintenance. Once we know the best program for us, they will provide an estimate of the cost. Probably within 90 days of implementing, the system could be up and running. We may have to focus on a start date to input current information, then go to "back filing" of historical documents which will typically take longer. We'll see what works best.

5/12/2015 @ 2:38pm - E-mailed Pam Colby asking for follow up to our discussion. No response to date.

Continuing to scan in important documents as they are reviewed and/or filed.

WEBSITE:

Information is updated daily as received.