

Document Management Scanning Instructions

ITEMS NOT TO BE SCANNED:

1. Publications: magazines, trade papers,
2. Items marked "Personal & confidential" on envelope
3. Checks (follow current check log procedure)
4. Junk mail: advertising flyers, class/seminar notices, catalogues

Special Scanning instructions:

- Policies and other policy documents (endorsements, audits) received from insurance companies usually include the original plus the agent's and/or producer's copies. Neither the original nor the agent's copy represents a "complete" set. Scanned document must include each unique form from each copy received. Compare all copies and add any needed additional form to the original policy, then scan.

Special Routing Instructions:

- Original policy and other policy documents must be routed to appropriate department.
- Any document with an original ("wet") signature (except letters addressed to Atlas) must be routed to appropriate department.

Document Management

Scanning Instructions

Scanning Procedures

Document Handling

- When there is a sticky note (e.g. post-its) or loose tag, xerox another copy of the page with the sticky note and scan it along with the original page without the sticky note.
- Tape down or xerox another copy when the page is frayed or torn.
- Fan the pages to make sure there are no missed staples or paper clips and the pages do not stick.
- Add “noise” on the sheet when the document print is too light or the print is at the very edge or too tiny for the scanner to sense.
- Scanner will hold 500 sheets maximum. Divide the job if it exceeds this amount.
- Limit to 25 documents per batch so that it’s easy to re-verify the job.
- Do not rotate automatic, let the end user edit as necessary.
- Fujitsu does not have a dark/light feature, so make sure the copy is legible. If not, xerox using the dark/light feature to get the right amount of saturation.
- Eliminate hand date-stamping if scanned.

Scanner Handling

- Clean the scanner at the start of each shift.
- Be careful not to scratch the internal mechanism as it will show up on every copy and the part must be replaced.

Notes:

- Use color setting on all jobs. (Desktop shows Color DPI. Converts to a jpg. Will capture anything in color, including letterhead logos, etc.) Or, set to BW only (Converts to tiff), and use separator sheet to identify when Color is needed.
- If document already has punch holes, scan as is and let the end user delete any blank pages with punch holes only. A setting is available, but will not use, to eliminate blank pages with perfect circle punch holes. “Accept” then page is not part of IR scanning.