

Scanning 101

1. Document Preparation – Preparation of the records prior to scanning is a necessary and critical step. Care should be taken in the preparation, content and arrangement of original records for scanning to ensure that a true, accurate and complete reproduction is created.

The functional steps in the document preparation process include but may not be limited to:

- a. Remove all staples, paper clips or other fastening devices.
 - b. Repair all torn or damaged documents.
 - c. Remove creases or folds for the pages so that no information is covered or lost.
 - d. Remove extraneous documents.
 - e. Identify and locate missing or misfiled documents.
 - f. Identify and mark out any [confidential or sensitive data](#).
 - g. Arrange the documents in the order in which they are to be scanned.
2. Scan the document – Specific steps for scanning your document(s) will be dependent upon your [scanning equipment](#). Preparation of your equipment for scanning will include:
 - a. Set resolution to 300 dpi for text, drawings and photographs.
 - b. Set file type (also known as format) to PDF (preferred) or TIFF.
 - c. Scan the document.
 - d. Move the document to your units file storage location. Your unit should develop internal procedures to ensure quality scans are created and attached to edocs and HRForms.
 3. Quality Control – Inspect the scanned images to ensure that they are good enough quality for the purpose for which they are being scanned.
 - a. Verify that there are no missing pages.
 - b. Verify that the text is legible throughout the document.