



Paper File Prep for Department of Revenue Conversion

as of February 15, 2013

Each agency will prepare existing paper OPFs for submittal to the Department of Revenue (DOR). DOR will scan the paper documents for conversion to the electronic OPF. Follow the instructions below to prepare the OPF documents.

1. Make note of the amount of square feet of space which is dedicated to OPF document storage (this figure will be used by OA in its efforts to quantify overall project cost savings).
2. Remove any bindings from existing OPF files, such as paper clips, staples, rubber bands, spiral binders, etc.
3. Sort the contents of an OPF into separate document type groupings as defined by the Agency Barcode Creator (ABC) database.
4. For each document type grouping for a single employee, prepare a barcode header sheet that will be placed at the beginning of that group of papers.
5. Arrange all pages in the same orientation.

NOTE: Legal-sized documents should be placed into the employee's completed folder in the opposite direction of letter-sized documents.

6. Re-stack all document groupings for the single employee (along with the printed barcode sheets at the top of each grouping) together into a single folder.
7. Place the prepared employee folders in boxes for transportation to the DOR, Bureau of Imaging and Document Management. If the agency has satellite offices, they will be required to transport their boxed, prepared files to their Harrisburg office for pickup.

NOTE: Each folder should now consist of a single employee's OPF document groupings, along with the printed barcode sheet at the top of each grouping.

8. Complete the DOR Paper File Conversion Info Form and email the form to the DOR contact listed at the bottom of the form.
9. The DOR will pick up the files from the location specified in the form (listed in step 8 above), and will return the paper files in approximately one week.

NOTE: The DOR scanning process may cause the files to be returned to the agency in a different order than which they were sent.

10. Using procedures defined by your agency, quality assure the scanned files in SAP. Once QA has been completed, all paper OPF files should be shredded.