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Procedures and Form for Preparing Records to be Scanned

1. **Scanning Guidelines** – Prior to scanning records – please refer to the scanning guidelines on the Hub. It is important to ensure that the Information Management Team has been consulted prior to scanning to ensure all protocols have been completed. Please contact the Information Management Team if you require assistance.

2. **Keeping Original Documentation When Scanning is Complete - Long Term Archive Decision Making** – **Does your documentation have historical value? If in doubt please contact the archivist for advice. If in doubt about retention period please consult SCARRS Schedules (on HUB) or IM Team if unsure**

3. **Preparation of records for Scanning**

   - Review the records within the files and rationalise records where required.
   - Complete the Internal Scanning Form (attached)
   - Log files on this form and estimate the number of records (front and back) you wish to be scanned. This allows you to check the number of images and number of records when the scanning is complete as part of the quality checking process.
   - One form should be completed for each box of records. Save a copy of form in your teams shared location
   - **Naming Convention Example – Year-Month-Day-TeamQL-BoxNumber - Eg - Planning Team – 20120709PLQLBox1**

4. **Naming Convention** – This section should be used to inform how you wish the scanned record to be named. Guidelines on recommended conventions can be found on the Hub. Refer to IM team if required.

5. **Quality Checking Images** – Refer to “Scanning Guidelines” available on the Information Management section of the Hub.

   - When all records have been scanned quality checking should take place and logged on Record Scanning Quality Log
   - Check the number of images corresponds with the number of files / records scanned, a 10% check should be sufficient
   - Take appropriate actions to rectify / note any errors.

6. **Saving Images to your Drive**– As a matter of priority all scanned images should be saved in an area where they are easily accessible by all employees who need to access them. Please refer to the “Structuring and Managing the Shared Drive” guidance. Refer to the Information Management team for guidance if required.

7. **Authorisation of Destruction of Records - Internal – EDC** – Refer to the Destruction Authorisation Procedures and complete a Destruction Authorisation form to approve the records for disposal internally within EDC. These procedures and form are available from the Information Management team or on the Hub.

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Information and Records Management

EDC Internal - Records Scanning and Quality Checking Form

File Number / Reference / Naming convention of document to be scanned ✱ **(refer to scanning guidelines)**		**Document scanned by**	
Date Scanned		**Number of pages scanned**	
All pages scanned correct number of Images (file size correct) 100% checked	**Checked Y/N:**	**Resolution and Quality of images confirmed as correct**	**Checked Y/N:**
Percentage of records Quality Checked		**Actions Taken to Resolve Errors – (Where there is a high percentage of errors – increase % check)**	
Disposal of Original Records Required When Quality Check Completed	**Y/N**	**Method of Destruction**	**Confidential / General / Recycle**
Transfer of Original Records to Archivist	**Y/N**	**Transfer Form Number**	
EDC Destruction Authorisation Form for Scanned Images has been signed off by the Service Manager. **Note: - The EDC Destruction Form must be authorised prior to the final destruction of the records.**	**By:** **Date:**	**Records Picked Up and Destroyed - (Confidential Waste Provider only)** **attached COD certificate to destruction form.	**COD certificate Number :**