

# Ideas for Running a Proficient Paperless Office

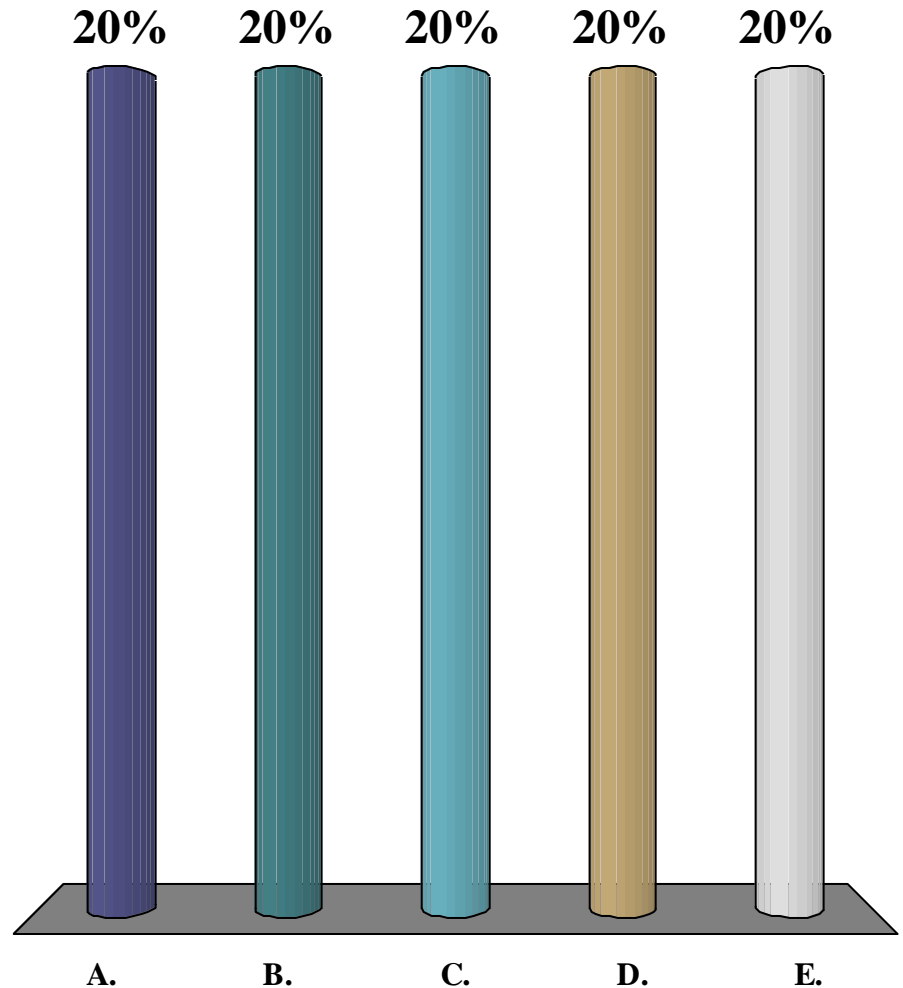


# Paperless Office Video

- <https://youtu.be/7kUQZR0l0rg>

# Would you say that your office is an effective paperless office?

- A. Yes
- B. No
- C. We are getting there...
- D. Not Sure.
- E. Not going to happen.

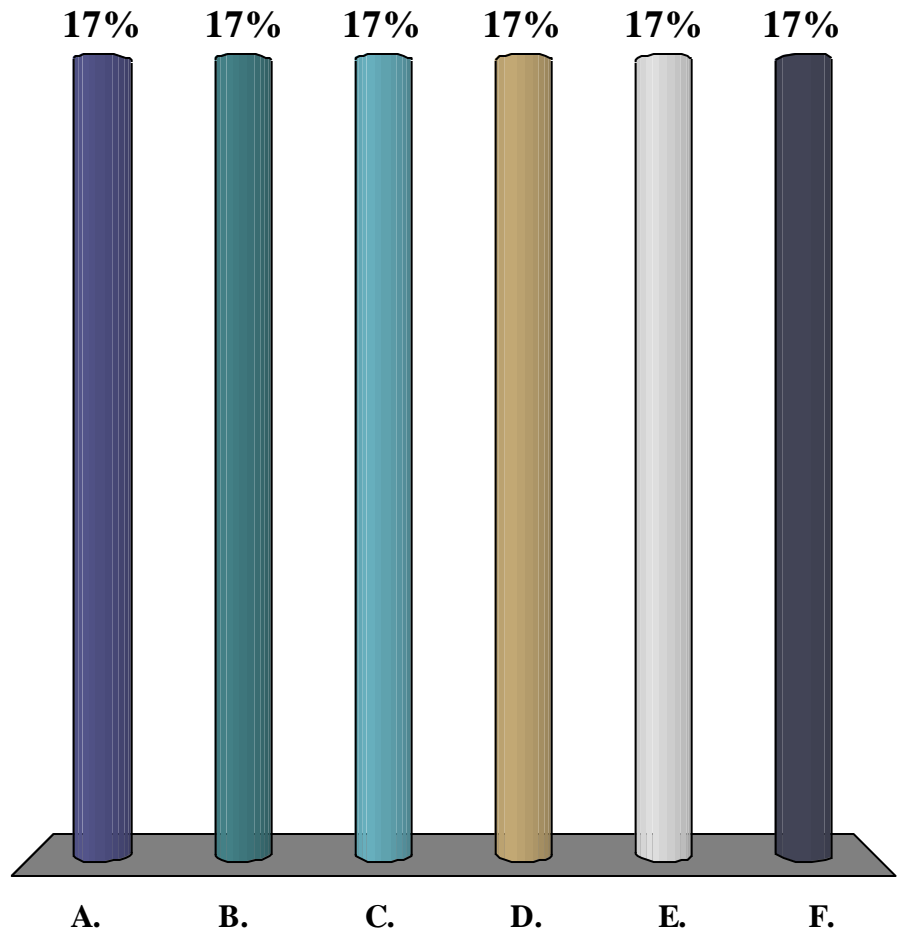


That's why I went for the paperless office. It makes it LOOK like I'm actually getting things done.



# What are the critical references used to meet a paperless office goal?

- A. Federal Only
- B. State Only
- C. Rules only
- D. Office policy
- E. None of the above
- F. All of the above



# **Federal Statues:**

Title 42 USC 1974 Section 1974 Maintained within State/Office

# **State Statutes:**

92.29 Photographic or electronic copies

119.011(12) Public Records

257.36(5)(a) Designation of Records Management Liaison Officer (RMLO)

257.36(5)(b) RMLO requirements

101.5607 Department of State to maintain voting system information

98.065 Registration list maintenance programs

98.075 Registration records maintenance activities

## **Administrative Rules:**

GS1-SL General Records Retention

GS3 Election Records Retention

1B-24.003 F.A.C. Public Records Scheduling and Disposition

1B-26.003 F.A.C. Records Management –Standards and Requirements-Election Recordkeeping

## **Authorized Software:**

Docsvault - all non Voter Records/Documents

Voter Focus - all Voter Records/Documents

Microsoft Office - Generation of Forms/Correspondence/Financials

## **Hardware:**

Any scanner capable of scanning at a minimum of 300 dots per inch. (Example: Kodak, Fujitsu, etc.)

## **Manuals/Forms/Instructions:**

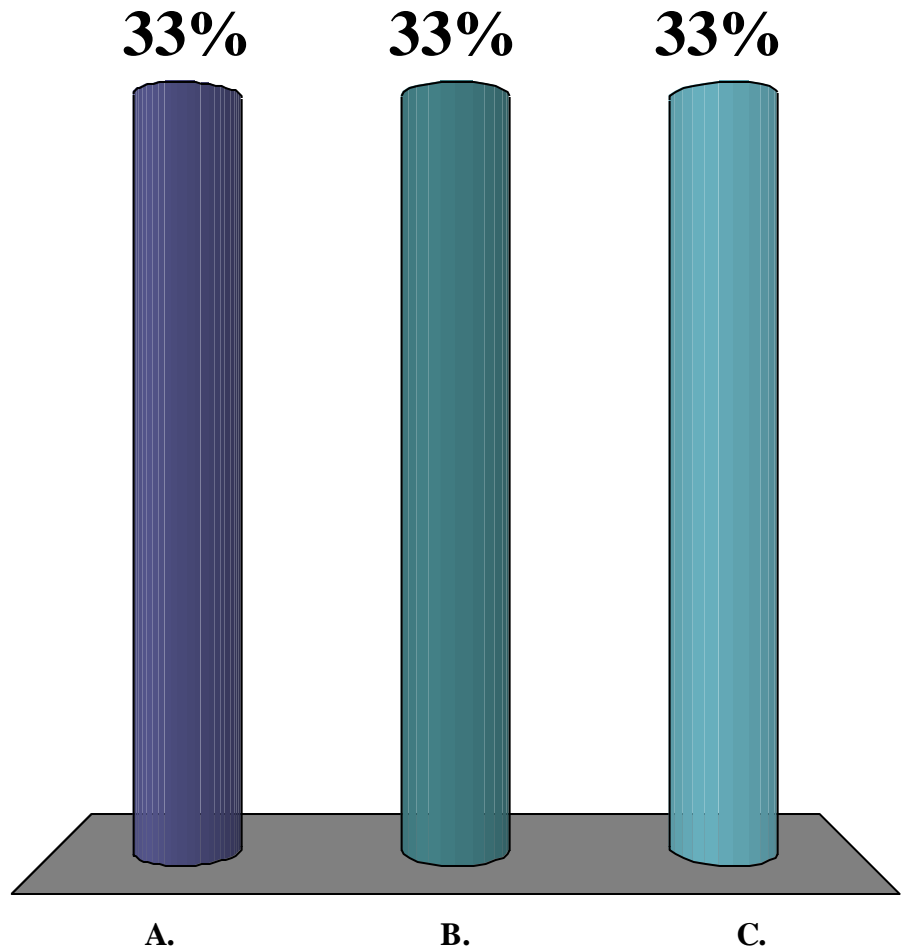
OSA – Obsolete Superseded or Administrative Value Lost

Quality Management Systems (QMS)Manual

LS5E105R Records Retention Schedule (Report for Records not listed or discussed)

# What is your opinion of your office/area on Paperless and Records Retention?

- A. We are paper and will stay paper and plan to keep everything.
- B. Work in progress.
- C. Would like to make it happen.





# Steps you can take to become paperLESS ...

- Internal Documents & Forms
  - Shared drive
  - Implementation of Document Management Software.
- Sign up for Paperless Billing Statements & Online Payments
- Meetings-use electronic documents instead of print outs.
- Instead of printing and faxing, save documents as pdf & send as email.

# Save it-Track it-Find it-Update it!

Docsvault Enterprise Client

File Edit View Tools Help

New Import Scan Filing Area Options Email With Refresh Cut Copy Paste Delete Thumbnails Recycle Bin Tasks Logout

Workflow

- My Workflow Tasks
- Participated By Me
- Managing/Watching
- Documents
  - AA Approved Forms & Manuals
  - AA Bulletin Board Office
  - AA Correspondence In-Out
  - AA Draft Work Area
  - AA EBox Mail
  - AA PTO Requests
  - AAA ES&S Upgrade-All Records
  - CAN Legal Ethics Records
  - Customer Surveys
  - ELC Ballots-Coding
  - ELC CAN-REP-AMD Election Cycle
  - ELC Canvassing Board Law Reference
  - ELC Canvassing Board Perm
  - ELC Notices-Sample Ballot-Book Closing #s
  - ELC Political Party Exc.Comm
  - ELC Project Calendar
  - ELC Public Testing Thru Audit
  - FIN Budgets-Acct line Transfer
  - FIN Contracts
  - FIN Disclosures All Appointed
  - FIN Grants
  - FIN Processing-Receiving
  - FIN Supplier-Vendor Evaluations
  - Graphics Pictures SOE Office
  - HR Human Resources Office
  - HR Payroll
  - HR TP Training Inter-Office
  - IT Communication Office
  - Map Special Districts
  - Mapping
  - PC Political Committees
  - PCT Contracts-Site Survey
  - PED Records
  - PET Initiative Petitions
  - Public Records Requests
  - QA Audit
  - QA Education
  - QA Inprocess-DU & Revision of Forms and Manuals
  - QA ME -Measurement Evaluation

AA Approved P... x Task In New Tab

Name	Description	Size	Ver	Out by	Pages	Modified	Doc. ID
1 - 10 SOE QMS Manuals						2/6/2015 12:05 PM	FD00005802
1- 200 VRN linked Voter Mail Merge forms						7/31/2014 7:43 AM	FD00007910
1000 - 1999 QA Forms and Instructions						4/3/2014 2:48 PM	FD00005803
10000 - 10999 Staff Office Forms and Instructions						10/3/2014 2:37 PM	FD00005804
11000 - 11999 Labels & Cards All Office						6/10/2014 9:43 AM	FD00005805
12000 - 12999 ES Election Security Forms and Instructions						4/27/2015 10:05 AM	FD00005806
13000 - 13999 TRN Training Office Only						9/7/2011 2:42 PM	FD00005807
14000 - 14999 TRN PEO Precinct Election Official Training						12/4/2014 10:09 AM	FD00005808
15000 - 15999 PUB Published Voter and Office Information						12/6/2011 4:10 PM	FD00005809
16000 - 16999 CAN Candidate & Committee						10/17/2014 8:36 AM	FD00005810
17000 - 17999 CB Canvassing Board Forms and Instructions						5/15/2014 4:51 PM	FD00005811
18000 - 18999 EN Election Notices Office Templates ALL						3/12/2015 3:36 PM	FD00005812
19000 - 19999 MT Maintenance Procedures	All Scheduled Inspection and Replacement Proc...					5/13/2015 11:48 AM	FD00009571
27000 - 27999 GPJ Special Project - Program Templates						2/4/2015 2:51 PM	FD00005813
99000 - 99999 MGT SOE and authorized personnel only						5/8/2015 11:47 AM	FD00005814
FC 1 - FC 500 Flow Charts						6/14/2011 7:35 AM	FD00006012

General Version Related Documents Security Audit Trail Linked From Retention

**Owner:** Mark **Desc:** Approved Forms and Instructions only. No changes are allowed.

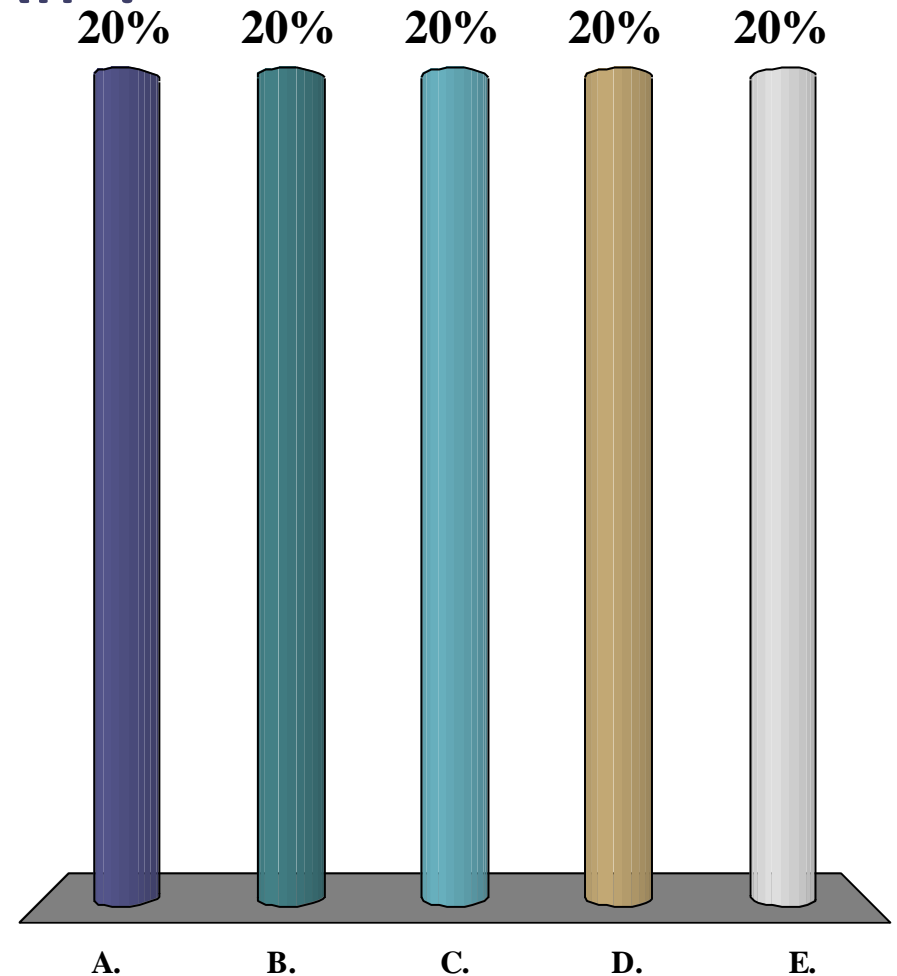
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**Workflow:**

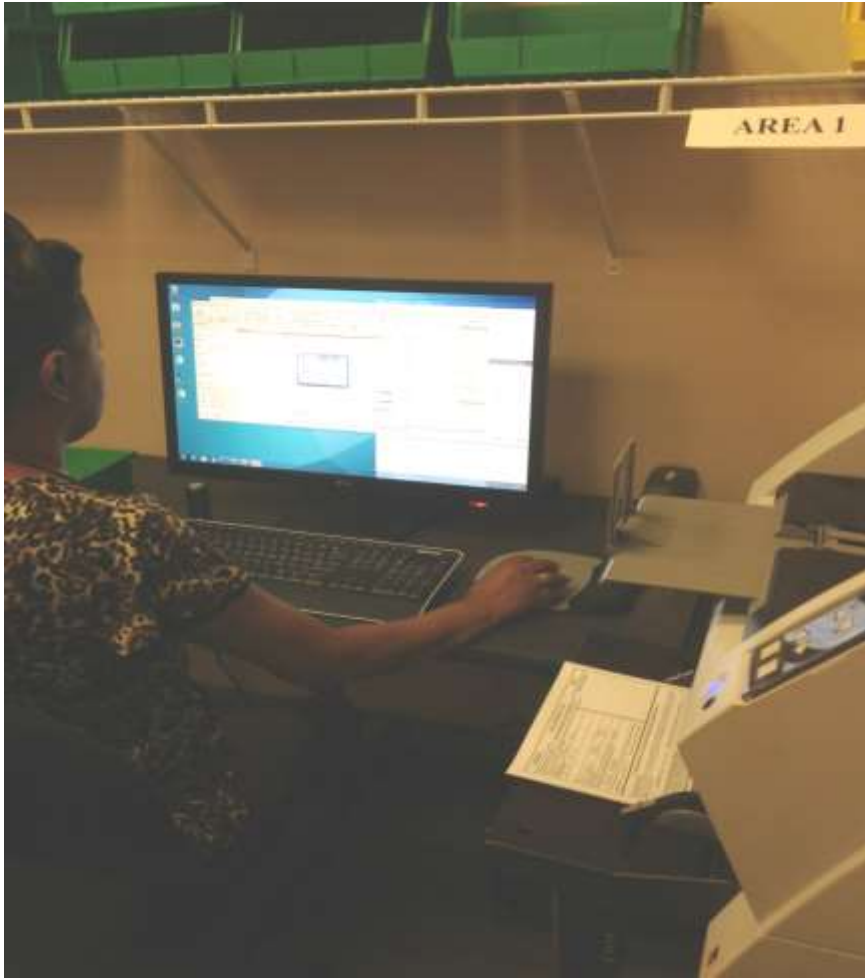
In your opinion, when it comes to going paperless, the approach should be a “One Size Fits All”.

- A. Nationally
- B. In your office
- C. Statewide
- D. County by County
- E. No one size fits all



# Incoming/Outgoing Correspondence

- One way in, one way out.
- All incoming correspondence is date stamped, scanned and verified prior to interoffice distribution.
- Paper records are considered an intermediate file while being received, scanned and reviewed.
- Electronic version of record becomes “Master Copy”-stored in electronic filing cabinet.
- Voter Records are stored electronically in VR software



High speed scanner allows us to automatically Date/Time Stamp and scan multiple pieces at the same time.

50 Registration Applications can easily be scanned and date/time stamped in under 1 minute.

Merchant

Phone No. (optional)  
855-255-6215

Zip Code

Date  
6/4/15

I am interested in becoming a poll worker.

I will need assistance with voting.

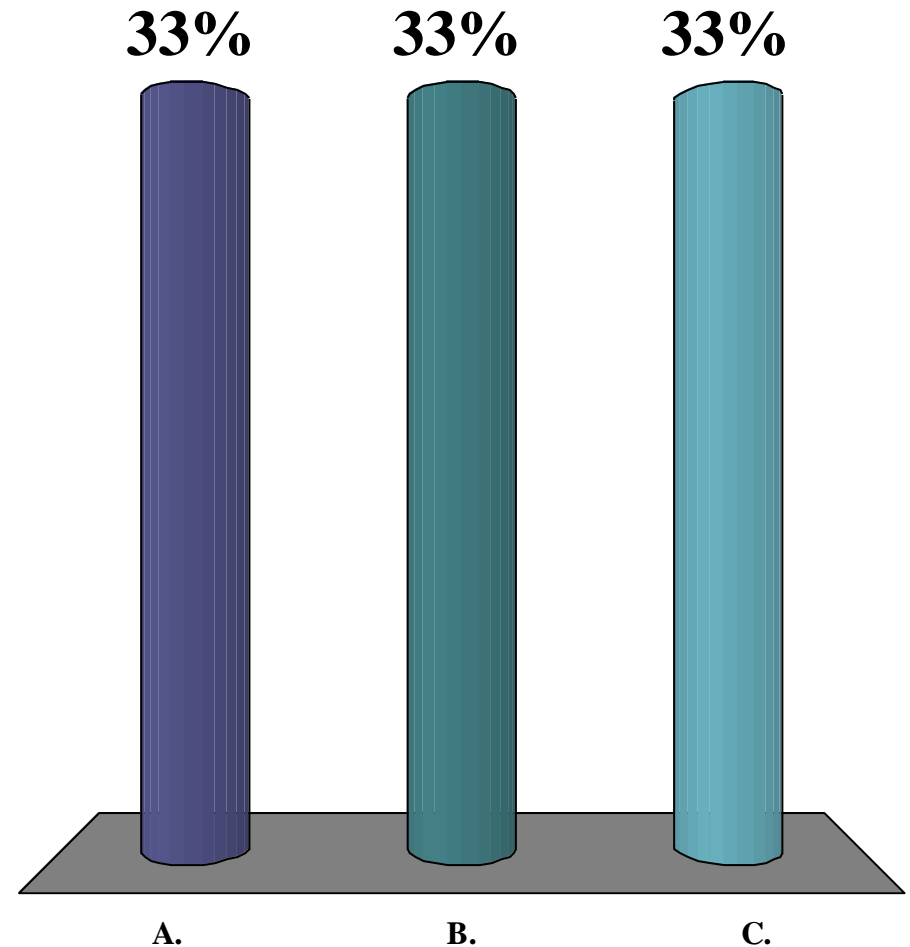
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# Incoming/Outgoing Correspondence

- Once scanned & verified, incoming Paper copies are stamped and placed into box labeled “OSA” Obsolete Superseded Administrative Value Lost.
- OSA box is maintained a minimum of 30 days and then scheduled for disposition by RMLO.
- Records Retention is attached and maintained electronically.
- All outgoing correspondence can be scanned and verified prior to leaving your facility to show a record of what your office has sent out.

# In your opinion, what is more secure, Paper or Digital Files?

- A. Paper
- B. Digital
- C. Both have different risks.





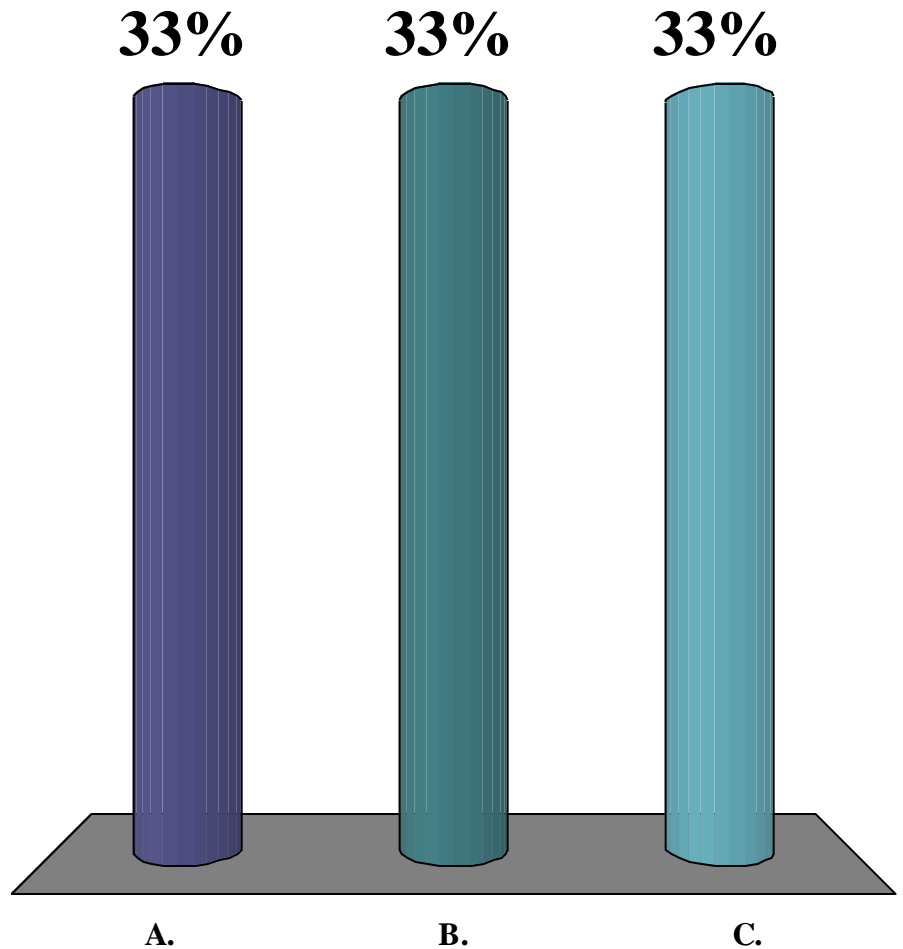
# Barriers Associated with Paper Files

- Fire
- Weather Conditions/Mold
- Lost/Misplaced
- Difficult to Search
- Storage Space
- Lack of Security
- Open to physical change or update



# Do you have office areas with piles of paper?

- A. No
- B. Yes
- C. Yes but, I know where everything is.



# Benefits associated with Digital Files

- Security
- Minimal Storage Requirements-Cost Savings
- Searchable Records
- Sharable Files throughout your office
- Records Retention/Disposition Tracking
- Electronic Back Up



# Challenges to overcome...

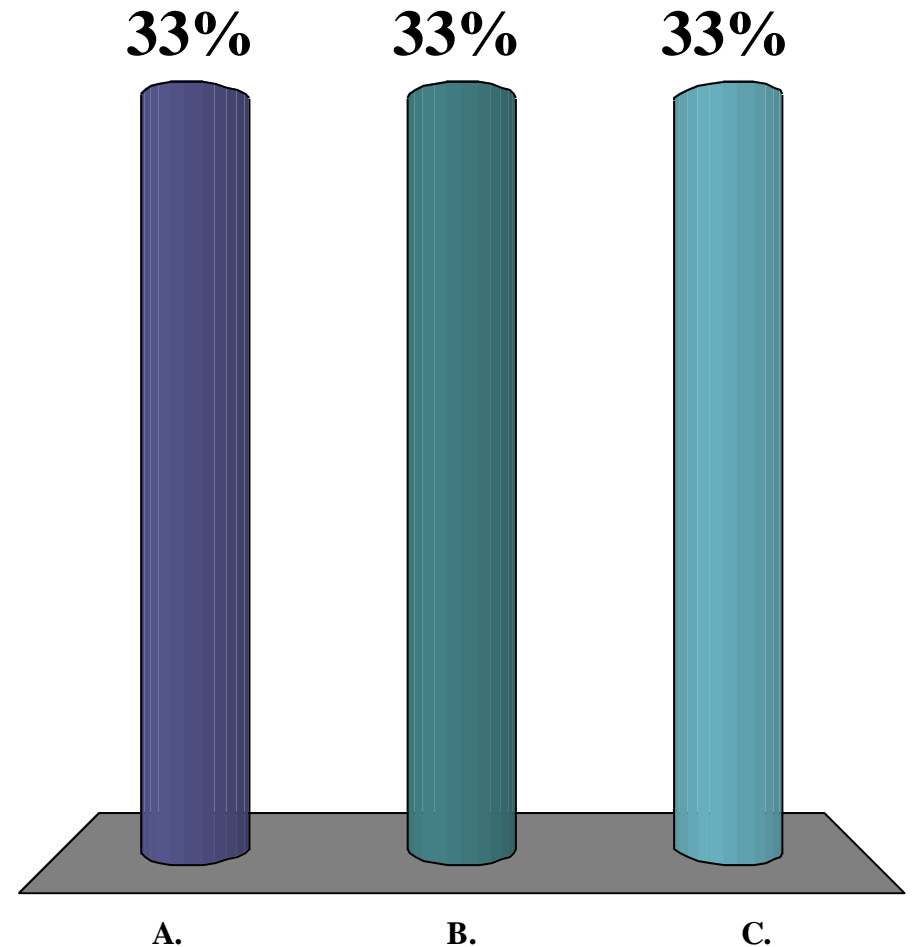
- Change
- Initial Cost
- Training
- Establish Office Policy/Procedures
- People who won't give up paper

# Have old files that you need to keep?

- Consider doing a “Retrospective Conversion Project”
- Scan all archived records to eliminate excessive storage space.
- Remember Records Retention is always a part of the rest of the story.

# In your opinion, this presentation was...

- A. Awesome
- B. Beyond Expectations
- C. Bay County SOE Office Rocks!



**I JUST WENT  
PAPERLESS!**



**YES!**