

### **PROs File Preparation Guidelines**

#### **Basic Scanning**

- Remove all staples and paper clips.
- Scotch tape all 4 sides of small items (such as post-it notes and jury notices) to an 8½ x 11 sheet of paper.
- Separate carbon copy forms and only submit the most legible copy for scanning.
- Submit only paper and lightweight card stock for scanning.
- Unfold corners and documents larger than 8 ½ x 11.

#### **File Preparation**

- Every document requires its own coversheet indexing form. Do not use one coversheet indexing form for multiple documents.
- Ensure that all the documents being prepared for scanning belong to the person whose file you are preparing.
- The document date on the cover sheet is the date that the document was printed or signed. It is not the date the document was prepared for PROS. If the coversheet was generated without a document date, print the document date on coversheet with black pen.

#### **To help us process documents faster and more accurately:**

- Scanning batches may have multiple document types and multiple employees; ensure each document has its own coversheet.
- Each batch of files should be no thicker than 3 inches.
- Rubber bands are ideal to hold large batches while binder clips are ideal for small batches.
- Historic I-9's should be placed on top of the batch. I-9's digitally created should not be printed and sent to PROs.
- Batches must be sent to scanning in a secure [Personnel File Transfer](#) envelope.
- Remove any documents that should not be included in the personnel file. Examples of such a document are the 'Demographic Data Transmittal and Voluntary Self- Identification of Race, Ethnicity and Veteran Status forms.

*Any questions, please call Document Management at (949)-824-4147.*