Document Imaging Request Form

Submit to: doc-scan-info@umich.edu

Contact Name:	Email:	Phone:
Secondary Contact:	Email:	Phone:
Pickup Location:		Dept/Unit:
Project/Document Name:		

Please answer the following to the best of your ability. This will help to better assist you.

Cost Estimation

1. If possible, please let us know your estimate of how many full boxes of documents you have (assume that a box is 11" wide x 17" long x 9" high): _____
2. Please describe each document type and approximately how many of each?

3. Please provide a deadline if there is one applicable to this project: _____

Note: These projects are worked in a first-in, first-out basis as time permits, between daily tasks. Quick turnaround time may result in the need for overtime, which would subsequently increase costs.

Document Preparation

1. Prep-work is needed before imaging can begin. Examples could be removing staples, removing or repositioning post-it notes (so they don't cover up information) taping down very small pieces of paper, etc. Will your department be doing this prep-work, or would you like our assistance? _____
2. To remove staples, our normal process is to cut them off to prevent the scanner from jamming. This is more time and cost-effective. Is this method of removal satisfactory for your project?
   Yes
   No, please keep documents intact and remove staples by another method.
3. Do blank pages need to be deleted?
   Yes
   No, not important for this project.

Note: Our scanning software can be set to delete most blank pages correctly if scanning black and white only. If scanning with other specifications, this would require manually deleting blank pages. This may take more time and could increase cost.

Naming Convention/Indexing

1. Do your documents currently have a naming convention you'd like to use? If so, where is it located on the documents? _____
2. If not, how would you like to name these documents? Please provide a sample: _____

Note: It is important to think carefully about how your documents will be digitally organized so that they are easily retrievable. Some items to consider are:

> ➤ The name of an individual - **Last, First** or **First, Last** or **Last, First, Middle initial** or **First initial, last** etc.
> ➤ Including a Date - **YYYYMMDD** or **DDMMYY** or **DDMMYYYY** or **MYYYY** etc.
> ➤ Document type/title
> ➤ Account numbers
> ➤ Do you want spaces, commas, dashes, or other characters included?
> ➤ Are initial caps and lowercase letters how you want them indexed (most common), or all CAPS?
> ➤ Do you want to be able to organize document names alphabetically or numerically (most important criteria would go first, if sorting on the index name)?

3. Approximately how many pages are in an average document? _____

Note: This gives us an idea of how much indexing is needed. For example, it takes more time to index every four pages versus every 50 pages.

Scanning Options

1. Would you like to be able to search for keywords within the documents?
   Yes
   No, not needed for this project.

Note: Handwritten items are not recognized well, if at all, by the OCR software.

2. Is a 300 dpi resolution setting and PDF format acceptable for your documents?
   Yes
   No, we need:

Note: We are able to do fewer dots per inch if file size matters. However, 300 dpi is our standard and the minimum for the OCR software.

3. What color setting would you like used?

Note: Auto color automatically decides how to scan a page between black and white or color, but it does not capture all color.

4. Our scanning software will auto-rotate most pages correctly, but when there is a lot of handwriting, graphics or type in multiple directions, it can incorrectly guess the correct orientation. Is page orientation important for all pages?

   Yes, please ensure pages are saved in the proper orientation.

   No, not important for this project

Storage and Quality Control

1. How would you like quality control completed?
   - **Page Count** - A count of each document is done before scanning and written on the document, followed by verification of the count in the file after scanning is complete. (Standard)
   - **Page-by-page Visual Verification** - Reviewing every page after scanning to compare with hard copies. (This does take longer and increase cost.)
2. Where will the electronic documents be stored?
   - Put them in a U-M Box folder(s) you share with us as PDF files. This method is HIPAA compliant. (We'll need editor access until the project is completed.) The folder name is:
   - Put them in Google Drive folder(s) you share with us as PDF files. (We'll need editor access until the project is completed.) The folder name is:_____
   - Scan them into Perceptive Content as TIF files/images, which is for actively used files and can also be accessed through Wolverine Access/WebNow.
     Other storage type.
3. Do your documents contain any sensitive information?
     Yes
     No

4. After scanning, how should the documents be handled?

For questions, or examples, please call:

Ashley Mills - Supervisor: 734-764-8499

Next Steps:

Once we know your specifications, our team will be able to provide you with a time estimate of how long it will take to meet your requirements. This will only be a rough estimate, but you will be able to use it to calculate a rough total cost (number of hours per box x number of boxes x SSC hourly rate). The Shared Services Center bills monthly for the number of actual hours spent on your project that month.

After an agreement is reached and your project is ready to scan, call Metro Delivery (734-973-0973) to schedule a pickup and to deliver your project to our office.

- They will need to know your shortcode, the location of pick up, and the SSC address to deliver to (provided below).
- They will also need contact names, phone numbers, a day for the pickup, and the number of boxes that are ready for pickup.
- The cost is approximately $12 per standard deliveries. A standard delivery requires you to call before noon, and one business day to deliver. Pickups scheduled in the afternoon for the same day delivery are considered rush deliveries, and larger charges are incurred.

SSC Document Imaging & Triage
Shared Services Center
1000 Victor's Way
Ann Arbor, MI 48109-1287