

Imaging – Backfile Conversion

Lessons Learned

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Three Key Factors for a Successful Backfile Conversion

1. Plan

2. Plan

3. Plan

Things to consider

- Sizing the job
- Home or away?
- Defining the process
- Define document prep
- Define documents types

Sizing the job

- **Determine what files are to be imaged. (deaths, terms?)**
- **How many pages? Two techniques:**
 - Inches – measure draw space used in inches and estimate (or count) pages/inch
 - Select a few typical files per type (active, retirees, term vesteds, etc). Multiply number of pages by number of files (by type). Add.

Your Place or Theirs?

■ Theirs

■ Advantages:

- Less disruptive
- Less expensive (but don't forget shipping costs)

■ Disadvantages:

- Shipping risks
- Files not available

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Your Place or Theirs?

■ Yours

■ Advantages:

- Files available as needed
- Staff available to answer vendor questions
- Files never leave your control

■ Disadvantages:

- Disruptive
- Space
- Power



Define the Process (Details would be different for Yours or Theirs)

- **Identify space**
 - Non-disruptive
 - Adequate power
- **File Handling – Who pulls files?**
- **Keeping records – Box labeling**
- **How are files accessed during backfile conversion**
- **Timing – When are files pulled?**
- **Staples/Paper Clips/Rubber bands – How are these handled?**

Indexing

- **Document types**
 - Too many is not good
 - Creates a large learning curve for vendor
 - Bogs you down in QA
- **Main aspect of QA is that documents are keyed (SSN or other ID) to proper person.**

