PROs File Preparation Checklist and Guidelines for Submitting Physical Documents

☐ 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 8½" x 11"

☐ 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 employee 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.

☐ Send personnel files through intercampus mail in a sealed Personnel File Transfer envelope to ZotCode: 4130.

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 to ZotCode: 1430.
- 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.