

1. Name, Address, Telephone and Email of Company

2. Is there a desired start date?

3. Is there a desired completion date?

4. Will you be boxing the files for Delivery or would you like the Vendor to do so, and will Vendor be picking up Files?

5. **Volume:** How many boxes, **size of boxes**, lateral or vertical drawers or shelves, **size of drawers, shelves**, number of files per drawer/shelves do you have that you are considering Scanning? Do you know the estimated number of images?

6. What are the titles of the application(s) you are considering Scanning/Microfilming? (Ex. Applications, Human Resources, AR/AP, Medical Records, Financial Reports, Invoices, Statements, etc.)

7. What % of double-sided documents is there for each application (paper)?

8. What level of preparation is needed such as removal of staples, paperclips, fasteners, etc.? None, minimal, excessive?

9. What is the average # of pages/frames per record/file? (Approximate)

10. How would you like to search/retrieve these files? File folder level? Document level? And, what is the field layout for retrieval? Name all fields with character lengths? Ex: Customer Name, D.O.B (30)

11. Will you need OCR (Optical Character Recognition) for text/content search capabilities?

12. Do you currently have a Document Management System in place?

13. **Disposition of Originals:** Will you be storing the paper after scanning or having it securely shredded after a 30-60 day grace period from delivery of the electronic images?