

Paperless Office Procedure

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Document Scanning Order

The documents to be scanned should be in the following order:

Group - Cover Sheet, Master Application and rest of documents
Life - Life Application, Illustration and rest of documents
Securities - New Account Form (There MUST be one), Application and rest of documents

Any Document added to an existing file should be inserted immediately after:

Group - The Cover Sheet
Life - The Life Application
Securities - The New Account Form
(See merging and deleting pages for the procedure to follow)

Scanning Routines

The Scanner has been preset to scan to the scanned documents folder on each persons desktop:

At the copier, do the following:

Choose "Scan", then pick your name for scanning location

This will cause the documents to be scanned to the scanned documents folder on your

desktop.

File Deployment

The "Main Computer" has nine desktop folders that are labeled as follows:

"Life "
"Group "
"Securities "
"Agent Files"
"Fixed Annuities"
"Individual"

Open the appropriate Folder for saving your scan to the "MAIN COMPUTER" hard drive -- Life , Group etc.

After the folder is open, **RIGHT CLICK** with the Mouse

Go to **NEW** and Pick **NEW FOLDER**

A new folder will be created inside the Life File, Group Files or Securities Files Folder (Whichever you are in)

Name the **NEW FOLDER** using Group Name for Groups and the Following procedure for Life, Individual, Annuities and Securities:

Life, Individual, Annuities:

The folder name should be **LAST NAME FIRST** with a space after the last name and then the **FIRST NAME**.

SECURITIES

The folder name should be **LAST NAME FIRST** with a space after the last name and then the **FIRST NAME**, a space after the first name and the **TYPE OF ACCOUNT**.

TYPE OF ACCOUNTS:

Individual	Corporation	IRA
Joint Tenants (WROS)	Partnership	Ira Rollover
401K	SEP	Trust
Tenants in Common	Roth IRA	Simple Plan
UGMA/UTMA	TSA	P/PS
529 Plan	Other	

These account types are found on the NEW ACCOUNT FORM that will be part of the submitted application on securities business. You should pick the type of account based upon the box marked on the new account form.

After creating the client folder, leave it open and find the scanned file. It will be found in the scanned documents folder on your desktop named by the date and time scanned. Left click the mouse on the file and "drag" it into the new open client folder.

Rename the file AFTER it is in the Client folder. The name of the client file should be THE SAME as the folder with a ".pdf" at the end. The .pdf is what identifies the file type. Failure to place this extension at the end of the file name will prevent it from opening.

Delete the date named file from your scanned documents folder on your desktop.

Close all folders.

File Attachment and Retrieval

Open the shortcuts that have been placed on your desktop for accessing the various folders (ie. life, group, etc.) You will now see the client or agent folders. Open the folder and double click on the pdf file. It will open on your desktop for review or revision.

Merging and Deleting Pages

To merge pages, go to the task bar at the top of the Adobe Program and choose "Document" then insert pages. Make your choice as to where you want the pages inserted. After the insertion has been done, save the document to include the new pages.

To delete pages, go to "Document" on the task bar at the top of the adobe program. Chose "Delete Pages". You can then choose the pages by page number to delete them.

If you delete pages you will need to save the document after completion just as you did when merging pages.