

STREAMLINING YOUR IMAGING PROCESS FOR PHMC COMPLIANCE

Whether you have paper records, microfilmed records or scanned images, with or without PHMC backups, Reynolds Business Systems is here to help you streamline your process and ease compliance to the new guidelines so you can free yourself from paper and microfilm.



CURRENTLY USING PAPER DOCUMENTS?

OLD:

- ▶ Paper documents waste a lot of storage space
- ▶ Retrieving files is cumbersome
- ▶ Mis-files are frequent
- ▶ Sharing documents is not easy

NEW:

- ▶ With the new PHMC guidelines you simply scan to PDF/A format and create the necessary backups
- ▶ No more paper originals to store
- ▶ No more microfilm backup

REYNOLDS CAN HELP:

- ▶ If you continue using paper and need more space to store inactive originals, RBS can store your documents in our secure facility and provide 24/7 access when you need an original.
- ▶ If you're ready to start scanning, Reynolds Conversion Services can take care of everything from document prep to scanning and indexing and fully compliant PHMC backups along with destruction of your original documents.
- ▶ If you're ready to start scanning documents in-house, Reynolds can provide the hardware, software and consulting you'll need to get up to speed quickly.



CURRENTLY USING MICROFILMED RECORDS?

OLD:

- ▶ You either have retained the original documents and use microfilm for daily access, or you've created a microfilm backup for PHMC and destroyed the originals
- ▶ You need to maintain reader/printers to access records and searching through film/fiche is cumbersome
- ▶ Sharing documents is not easy
- ▶ Paper documents waste a lot of storage space

NEW:

- ▶ You can eliminate the microfilm backup when you either scan the original microfilm to compliant PDF's, or switch from filming to scanning in compliant PDF format.

REYNOLDS CAN HELP:

- ▶ Reynolds can convert your microfilm to compliant PDF's.
- ▶ Reynolds can provide you with the necessary hardware to scan your microfilm in-house to compliant PDF's.



ALREADY USING SCANNED IMAGES?

OLD:

- ▶ After scanning you need to create a microfilm backup before destroying originals.
- ▶ If you don't have a microfilm backup, you have a lot of wasted space storing originals.

NEW:

- ▶ Per PHMC, there should be 100% QC of every record (every image checked for clarity and readability)
- ▶ QC must be performed by someone other than the original scanner
- ▶ Each piece of metadata must be matched against the original record.
- ▶ You must confirm electronic document authenticity, integrity and that it is virus free

REYNOLDS CAN HELP:

- ▶ Reynolds Conversion Services can provide fully compliant scanning and backups of your records.



For Reynolds PHMC Compliance Solutions, visit us at reynoldsbusinesssystems.com/new-phmc-guidelines

Or call: (610) 398-9080 or (877) 515-8500

This information is intended to highlight key changes to PHMC guidelines and should not be used to design compliance procedures.

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KEY STEPS TO PHMC COMPLIANCE

In early 2017, PHMC released new guidelines for managing government records. The good news, no more microfilm! However, there are important procedural and technical changes to follow. Primarily, the new guidelines require 3 copies of imaged documents if you will not maintain a paper copy.



Create a *User Copy*: **COPY 1**

The User Copy can be scanned to any format (PDF, TIFF, JPG, etc...) and can be stored online or on removable media. How you scan and the format you prefer stays the same as today.



Create a *Security Preservation File*: **COPY 2**

The Security Preservation File must be in PDF/A format (typically 1a for electronically PDF'd images and 1b for scanned paper files). This file **MUST** be secured against unauthorized access and stored online, either onsite or offsite.



Create a *Backup Security Preservation File*: **COPY 3**

The Backup Security Preservation File must be stored in PDF/A format (typically 1a for electronically PDF'd images and 1b for scanned paper files). The Backup File can be stored online or removable media **BUT** it must be stored offsite in a geographically different location from copies 1 and 2.



Additional Key Requirements

- ▶ PDF files must be migrated to the most current release of PDF as necessary and the process must be tested and documented.
- ▶ Backups must allow for expungement and secure destruction
- ▶ Backups should be regularly rotated to new media

REYNOLDS HELP TIP

If you use Reynolds Conversion Services, we will automatically scan your documents to PDF/A 1b, eliminating a step and cost.

REYNOLDS HELP TIP

Reynolds can create compliant PDF files and maintain your Security Preservation File on our servers.

REYNOLDS HELP TIP

Reynolds can create and maintain your Backup File on our systems, keeping them offsite and in compliance.

REYNOLDS HELP TIP

Reynolds can store all copies of backups on our secure systems and provide PDF migration and annual rotation to new media along with documentation.

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