

Add a New File to the Box

- Click the check box next to the item
- Click List Tools > New File (it takes a moment to load)
- Source is Certification
- Inclusive Date is the date the Agency Closed
- Retention Schedule is Provider Certification – Approved - 1

Adding a New File Cont.

- Recipient – Choose Agency for most providers
- Choose Individual Provider ONLY for CM (Care Coordinators)
- Records Center Barcode was assigned to the whole box. You should be able to put in part of it and have it pop up automatically!
- Notes – Old enough to be destroyed, 6 total folders etc.
- Click Save