Did you know...

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MuniMetriX News & Technical Tips

... *separating documents is a compliance requirement?*

A subject that comes up often when working with our customers is when to separate documents prior to scanning/uploading versus when it's acceptable to scan a complete file as one document.

Whether you are new to Silo, or have been using it a while, we recommend that from the date you signed up to the Silo system and moving forward, any new business documents, as well as documents that are less than two years old, *should be* separated out by document type. Below are some important reasons for this:

- Documents are smaller in size for quicker uploading and retrieval,
- Searching for a document is easier and quicker (i.e., typing in the specific document type for instant results instead of having to search page by page in a Complete File),
- It is simpler to find and select documents requested for Compliance review,
- Compliance requires the document separation to simplify the audit process.

When can you scan a complete file as one document?   When the date of the document is older than two years and is no longer subject to being audited, it can be scanned as a complete file. Simply use the cover sheet supplied by MuniMetriX to indicate which documents you are scanning in or uploading as a 'Complete File'. It is recommended that you confer with your Compliance Officer for confirmation on this subject. A complete file should include all documents related to one policy and must be

searched on a page by page basis for specific documents. It is worth noting that users can certainly choose to always separate all documents for efficiency if they choose to do so.

If you have any questions about this requirement, please do not hesitate to let us know! We can always offer a refresher training to go over the details. Remember, training is unlimited, and you can call for support at any time!

We encourage you, as a valued customer, to reach out to us should you have any suggestions or ideas you feel would be a benefit in your use of Silo. Please call us at 800-457-3733 or e-mail us at support@munimetrix.com any time! We appreciate your loyalty!