**How to send documents to temporary ‘Add to BOPS’ folder**

**(V3 – 21/08/20)**

Due to the current situation we’re unable to scan documents to BOPS. There’s currently work ongoing to develop a digital solution. In the meantime, it’s crucial that we have a standardised process in place and all documents are stored in a central location so that they can be easily searched and viewed using the title number and/or application number. This will also enable us o archive them in the future.

The page provides step by step instructions as well as some examples.

1. Create a folder on your desktop named using the **title number** followed by an **underscore** and **the application number,** followed by another **underscore** followed by either **ARCHIVE** or **BUSINESS** depending on whether the documents are to be added to the archive or business record (see details at end regarding 99 applications).

For example:



**Note: It’s crucial that this exact format is used with no spaces so that the documents can be easily searched in the shared drive.**

If you have documents for the same application to be added to the archive and the business record you will need to create separate folders, for example:



[Archive/Business record guidance](https://rosdev.atlassian.net/wiki/spaces/2ARM/pages/58690267/Archive)

1. Identify all the documents you wish to add to the archive or business record including the appropriate flysheet(s).

**Note: Do not send a document folder containing a flysheet only (e.g. TU, TS, FS, AS). Although applications comprising *only* a flysheet are regarded as part of the archive record, they do not require to be manually added by registration staff as they can be generated at any time through LRS. If there is a specific need to send one of these flysheets then it must be accompanied by documents or by a ‘FIND & VIEW’ paper which refers to documents under another application number.**

1. A) If you’ve been trained on how to merge a number of documents into a single PDF using ABBYY FineReader 14, then continue following that process and save the single PDF to the folder you created.

B) If you haven’t been trained on then follow this process:

* + Create a PDF of each document and save it to the folder you created
	+ Number each document in the order that it should be read (i.e. in the same way you would expect them to appear in BOPS with the flysheet first followed by the relevant documents in the appropriate order)

**Note: For document numbers 1 – 9 you must put a 0 before it as shown below so that they display in the correct order.**



* To add a document name, you must add an underscore and then the document name as shown below. This step is optional and you can use any meaningful document name, for example:



1. If previously would have generated a flysheet and used a ‘FIND & VIEW’ paper to refer to the documents under another application number, then complete the ‘FIND & VIEW’ template as normal and save in the folder as a PDF rather than saving all the documents.
2. Check that all the appropriate documents are in the folder and move the folder to the Add to BOPS’ folder on the O-drive (O:\Corporate Services Directorate\Approved\Add to BOPS)

If you’re unable to access the O-drive folder, please contact your TL to request READ-WRITE access through RoSNoW. Requests should be raised at department or directorate level rather than an individual basis (eg raise a request for everyone in Customer Services to have access)

1. Centralised Support will check that the documents are in the correct format and if acceptable they will move the folder to the appropriate county folder on the R drive.

If the documents are not in the appropriate format they will contact you to resolve.

**Documents that already exist on BOPS for paper submissions**

The above process should be followed where there are already documents on BOPS for the LRS application number.

For example, if the documents are on BOPS and you need to add:

* Intake or Settle referrals
* Post-intake correspondence
* Any other documents that have been submitted by the customer
* Internal documents

This process should also be used where the documents were scanned to BOPS but then the LRS application had to be cancelled and re-created (eg originally scanned as an FR but cancelled and re-created as a TP).

**99 Applications**

Where a 99 flysheet is used because the documents that need archived don’t relate to a specific LRS application (eg rectification or customer correspondence), then you must also append the date that you generated the flysheet to the folder name to make it easier for searching. The date must be in the format YYYYMMDD so the folders will display in date order.



(The date in the above screenshot is 1 July 2020)

**Digital Submissions**

The above process **should not** be followed for digital submissions. Documents (eg referrals, post intake correspondence, rejection documents) should be added to the relevant folder on the R-drive (TPs only) or to CMS (FRs & DWs) with the exception of the following:

1. The CMS case is resolved
2. Rectifications (RR applications and 99 applications)

For the exceptions please follow the process in the above instructions.

If there are any other scenarios and you’re unsure whether to use the above process, please email the Add to BOPS mailbox.