Document scanning checklist

Use this checklist to organize your own documents. The website creates PDFs from still images; the checklist does not scan, encrypt, back up, sync or determine when documents can be destroyed.

[ ] Choose a private workspace and protect your device.

[ ] Sort records into manageable groups; avoid entering passwords, account numbers or identity numbers into filenames.

[ ] Remove staples only if appropriate; handle fragile documents carefully.

[ ] Photograph each page in good light and review focus, complete edges and page order.

[ ] Use the converter with supported still images; check every exported PDF page, orientation and readability.

[ ] Decide where to store each file and who can access it.

[ ] Make and test a separate backup using your chosen storage method.

[ ] Check the issuing authority, applicable retention rules and whether a physical original is required. Do not discard an original based on a generic period.

[ ] If disposal is appropriate under the relevant rules, use an appropriate secure method.

Review completed by / date: _____ Notes: _____