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The face of records management and the definition of “business records” as you’ve come to know them have changed. It’s no longer just active versus inactive files or items that you put into storage at an offsite location and forget about. Business records today encompass a much broader spectrum of information that transcends traditional recordkeeping practices.

However, it’s not just the changing definition of business records or their formats to consider. It’s also legislation and compliance, legal exposure, privacy and security regulations, disaster recovery and business continuity planning—not to mention the day-to-day factors such as space constraints due to increased volume, the need to control costs, and your ability to access your information when you need it. Smart, well-run organizations recognize this ever-changing records management environment and adapt accordingly by sharing the responsibility with a reliable resource.

Iron Mountain is the world’s trusted partner for outsourced records and information management services. Founded in 1951, the Company services more than 310,000 customers throughout the United States, Canada, Europe, Latin America, and Asia Pacific. Our experience and records management expertise enable us to analyze your business from a unique perspective. Additionally, we can provide your organization with the full range of services essential to maintaining the health of your records management program.

**CONTROL, CONSISTENCY AND ACCESS THROUGH TECHNOLOGY**

Today’s business environment demands accurate information and quick turnaround times. Not to mention, the underlying responsibilities of records management have shifted towards mastering current compliance requirements and applying them to your records and information management program. Iron Mountain can help you achieve consistency by making it easy to integrate standard, company-wide retention schedules and policies into everyday practices.

We put you in control. Our technology solutions enable you to manage extensive inventory databases and sophisticated indexing, as well as track down your shipment in transit—right from your desktop. We call this robust technology infrastructure Iron Mountain Connect which is powered by the SafeKeeper PLUS® system—Iron Mountain’s proprietary inventory management software. Our IT professionals are continually developing next-generation solutions based on your records management requirements.

**RECORDS MANAGEMENT PROFESSIONALS, AT YOUR SERVICE**

Managing your business records today involves a lot more than it use to. At a minimum, it requires planning, expertise, experience, and resources—from scanning barcodes, to listing descriptive information, to archiving your records, to placing your order, to retrieving your information when you need it. A vast array of products, services and technology is impressive, but it means very little if not backed by great service. What sets Iron Mountain apart from the others? Simply put, it’s our people.

Iron Mountain’s ability to service your records management requirements professionally and efficiently is a direct result of our team of specialists who are dedicated to ensuring your satisfaction by understanding your business needs. Expert consultants, friendly and knowledgeable customer service representatives, experienced account managers, around-the-clock technical support, and courteous drivers are just a few of the hundreds at your service—every day.

Our goal is to build a lasting, mutually beneficial relationship with you. Whether you need us to pick up your records or walk you through our online system, help is just a phone call away, 24 hours a day, 7 days a week, 365 days a year.
Introduction

DOCUMENT MANAGEMENT SOLUTIONS

With Iron Mountain Document Management Solutions, you’ll have complete visibility and quick access to your most active business records. The enhanced access and control of this integrated solution will speed business processes and decision making, improve customer service and support regulatory compliance.

WHAT IS DMS?
DMS is an umbrella for a suite of offerings that will enhance your ability to access information in a secure and timely fashion. These offerings include:

Digital Record Center
- Hosted solution
- Easy set-up
- Flexible security configurations
- Workflow capabilities

Document Imaging
- Document scanning and conversion from paper to digital images
- Integrated with physical workflow
- Multiple delivery options: email, direct upload, Iron Mountain-hosted e-archive
- “Intelligent Scanning”

Onsite Active File Management
- File Room Management
- Records Center Management
- Imaging
- Records Program Management

Active File Management
- File completion verification
- Interfiling & versioning
- Multiple delivery options

Document Workflow Consulting
- Physical conversion and digital workflow design
- Implementation support

CONTACT US
For more information on Document Management Solutions please call us today at 800 899 IRON (4766).
COMPLIANT RECORDS MANAGEMENT — NO LONGER OPTIONAL

The Iron Mountain Connect Web-based system provides you with the tools you need to implement a comprehensive, compliant records management program.

Utilize the numerous resources available on the Iron Mountain Connect system, such as the Record Center, which provides instant access to your records, the Retention Schedule to review retention policies, and the Report Center to manage program compliance.

Iron Mountain Connect can transform your organization’s records management program into a compliance program by providing the necessary tools to integrate records management best practices into your everyday business discipline. Use the Iron Mountain Connect system as a guide through every stage in the development of a Compliant Records Management Program.

ORGANIZE

Start by determining the scope of your organization’s records management program and what staffing is necessary to support a compliance program.

Records Management 101. Review Iron Mountain’s information repository, which offers advice and best practices on program auditing, indexing for quick access and proper disposition of records. Knowledge Center: www.ironmountain.com/knowledge-center/knowledgecenter-home.html

ASSESS

As part of the assessment phase, you should identify all of your organization’s records, along with their physical location and legal retention requirements. If your records are consolidated at Iron Mountain, the Iron Mountain Connect system can provide a single view of your entire program.

DEVELOP

Develop a comprehensive retention schedule and standard, company-wide policies to set the foundation for a credible and consistent records management program.


IMPLEMENT

The Iron Mountain Connect system plays a vital role during the implementation and phased launch of a compliant records management program. By providing program administrators instant access to records and the flexibility to tailor specific training programs, the Iron Mountain Connect system facilitates implementation and adoption.

Access Information Instantly. The Record Center in Iron Mountain Connect maintains an electronic index of descriptive data on your records. This system handles search and retrieval, enforces the retention schedule and manages the health and maintenance of your records management program. The Record Center’s predictive search engine takes advantage of everything Iron Mountain has learned about how people really retrieve records. The result: you find your cartons or files fast.
Schedule Services at Your Convenience. Use the Record Center to request pick up and delivery anytime and order supplies from Iron Mountain as you need them.

Customize Content, Personalize Views. Administrators can upload records management policies and procedures specific to your organization and control what modules display for which users at an individual or group level. This can aid in training and adoption as materials are centralized and users only access approved information.

**MANAGE**
Managing long-term program maintenance and adoption is vital to establishing a culture that projects good faith in the compliance of their records management program. With features such as built-in retention capability, the Iron Mountain Connect system enforces best practices such as assigning hold codes to suspend the destruction of records. Flexible administrative architecture provides control over program users.

**Manage User Access.** Create a security structure that fits your specific business needs. Administrators govern a security model with up to three tiers that create, edit, and manage users on an individual or group basis. Add and remove privileges or organizational access from one or multiple users easily.

**Provide Consistent Records Classification.** Define data validation rules to ensure cartons and files are being added in accordance with your records management program.

**Manage and Enforce Your Company’s Retention Schedule.** Systematically enforce retention for all records, as the integrity of the retention schedule is the foundation of a compliant program.

**Manage Disposition of Records Through Hold Codes.** Apply hold codes on individual boxes, departments, record series, or accounts to prevent disposition when necessary.

**Control Data Entry.** Customize data entry to enable consistent classification and management of records to fit your business needs.

**AUDIT**
Use the Iron Mountain Connect records management system to perform periodic checks and audits necessary to ensure program continuance.

The Report Center provides you with the reports you need to effectively monitor and manage your organization’s records management program. Ensure that the retention schedule is being followed: classify records consistently and destroy them in conjunction with proper disposition. Numerous reports are available in the following categories on demand for your program management needs.

**Activity Reports.** User data, participation analysis, and activity history.

**Inventory Reports.** Snapshots and historic details of carton and file inventory and inventory quality reports.

**Retention Reports.** Detailed and summary information related to records classification, retention schedule, hold codes, and destruction eligibility.

**Financial Reports.** Summary activity and projected forecasts, invoice history, and activity tied to dollars spent.

**Shredding Reports.** Detailed information about upcoming scheduled visits for shredding services, an invoice trend data report for shredding services over a period of time, and an invoice report that provides information about charges that have been invoiced.

*All reports will be delivered to the Report Center within 3 hours of submission.*
THE IRON MOUNTAIN CONNECT FEATURES AND BENEFITS

The Iron Mountain Connect portal is your online connection to Iron Mountain, providing the tools necessary to manage records and information assets in today’s regulatory environment. Iron Mountain Connect puts you in control, transforming records storage into compliant records and information management programs.

Take advantage of the knowledge resources available on the Iron Mountain Connect system.

**Tips And Practices.** Industry white papers on best practices in compliant records and information management and information destruction.

**Regulatory Resources.** Regulations that affect the destruction of company information assets.

**Shredding Service Area for Report Center.** Access information vital for effective information destruction program control. New shredding-specific reports include activity and financial reports to enable activity and program financials monitoring.

**Activity Reports.** Scheduled Visit Report provides detailed information about upcoming scheduled visits for shredding services by date range and/or order type. The Shredding Trend Report provides invoice trend data for shredding services over a period of time. It enables shredding activity viewing by service or type.
Financial Reports. The Invoice Transaction Report provides information about charges by billing month and/or charge type.

The Invoice Download report provides information about charges that have been invoiced to you over a period of time. Reports can be generated by date range, charge type, and/or shredding service type.

Shred Center. Your online, anytime connection to Iron Mountain and your compliant shredding activities. Use Shred Center to monitor your shredding visit profiles and to view your pending shred order list at your convenience.

The Visit Profile List enables visit profile details to be viewed by company, division, or department. The Pending Orders List is a pop-up screen that displays open orders that have not yet been serviced by company, division or department.
ADDITIONAL IRON MOUNTAIN CONNECT FEATURES

Iron Mountain Connect Self-paced Training. Iron Mountain is offering complimentary Web-based training that covers the basics of how to most effectively use the Iron Mountain Connect Web-based system.

► This training is self-paced, so you can learn the system at your convenience.
► It is modular in design, so you can choose which learning topics you’d like to focus on.
► It is interactive, with simulations of common Iron Mountain Connect functions.
► And it is repeatable, so you can access a module as often as you’d like.

The Iron Mountain Connect Web-based training covers the following:
► How to navigate Iron Mountain Connect
► How to search for your records and place orders in Iron Mountain Connect
► How to add new boxes or files to your inventory
► How to run reports to manage and audit your program
► How to find additional Iron Mountain Connect tools and resources


Manage Users. Flexible administrative architecture provides the ability to manage user groups and privileges across divisions, departments and locations, ensuring users access appropriate information.

Innovative Search Technology. The predictive search engine in Record Center takes advantage of everything Iron Mountain has learned over the past 60 years about how people really retrieve records. The result: you find your cartons or files fast.

Easily Managed Transactions. Conduct quick search and retrieval for your information assets on Iron Mountain Connect.

24/7 Support. Search content-specific FAQ information, online help forms for general inquiries and technical issues and 24/7 Help Desk support for all Iron Mountain Connect applications.

Secure SSL Connection. Company information is safe and secure with industry-standard 128-bit encryption providing the highest level of protection for Internet communications.

All reports will be delivered to the Report Center within 3 hours of submission.

To learn more about the Iron Mountain Connect records management portal, and to get connected, please contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
The Iron Mountain Customer Support Guide

USING IRON MOUNTAIN’S SERVICES

The Iron Mountain Customer Support Guide is your reference guide for using our services. This manual provides step-by-step instructions for all the tasks you are likely to perform when working with us — your records management services provider.

The following pages summarize the steps needed to:

✓ Pack and index your business records
✓ Complete the forms required to send these records to storage at Iron Mountain
✓ Retrieve records from Iron Mountain
✓ Return records to Iron Mountain
✓ Understand the various types of available reports
✓ Destroy the records that have outlived their usefulness
✓ Read and understand your invoice and invoice reports

IRON MOUNTAIN RESOURCES

Iron Mountain offers you a team of Customer Response Specialists who are equipped with the latest tools and resources of the records management industry. Support is available 24/7 for your convenience. If you have been assigned an Account Manager, you have an additional layer of support. The Account Managers’ critical mission: “To make our Customer’s job easier while promoting professional records management.”

The Customer Response Specialists and the Account Managers provide the link between you — our Customer — and Iron Mountain. Account Managers make regular Customer visits to ensure your satisfaction and to build long-term partnerships. The Account Management staff provides records management training and education on Iron Mountain’s procedures, as well as current legislation and regulatory requirements that could impact your company and its recordkeeping practices.

Please contact your Iron Mountain Customer Response Specialist or your Account Manager with any questions you might have, or to learn more about Iron Mountain’s products and services as described in this Guide.

Throughout this Guide, we make reference to several departments within Iron Mountain. For your convenience, we’ve included their contact information below:

► Online records management with Iron Mountain: www.imconnect.com
► Information Technology Services (ITS) Info Center, 24 hours a day, 7 days a week:
  Phone: 1-800-888-2774 (for technical support only)
► Customer Response, U.S.
  Phone: 1-800-FASTFILE     Fax: 1-800-934-5348
► Customer Response, Canada (within Canada)
  Phone: 1-800-FASTFILE     Fax: 1-800-387-0124; 1-800-316-2464 (Maritimes)
► Iron Mountain Web site: www.ironmountain.com
SENDING RECORDS

Accuracy is a top priority at Iron Mountain and that’s why we’ve developed checks and balances to ensure that your files are packed, transported, barcoded, indexed, stored, retrieved, and refiled without error. As you pack your records, you’ll know precisely what you’re keeping and what you’re sending offsite. The easy-to-use Transmittal makes everything clear.

The Iron Mountain transportation team will carefully move your records to a local record center where they are well protected. They’re readily available whenever you need them.
RETRIEVING INFORMATION
Iron Mountain can help you quickly retrieve any information you require.

Need a record fast? Just enter your request on your PC, call, fax, or email. Our online capabilities and Customer Service Team can handle your order right over the phone. Our knowledgeable Representatives will access the Iron Mountain SafeKeeper PLUS inventory management system to locate your records.

Then, we’ll quickly retrieve your record. For files, we’ll place a barcoded outcard in the space from where your file is taken and place an identical barcode on the file. For cartons, we’ll place a barcode on the carton itself. When you return your record, we’ll match the barcodes, assuring 100% refiling accuracy.

Iron Mountain offers a number of standard delivery options thus ensuring that you can have the information you need, when you need it. When you’re finished with it, call us. We’ll pick it up and store it quickly and accurately.

RECORDS MANAGEMENT WORKFLOW | RETRIEVAL
**DESTROYING INFORMATION**

Upon written authorization by a **Destruction Authorized User** from your organization, Iron Mountain will destroy your records.

- **Secure Shredding.** Under this method, Iron Mountain destroys records by shredding, rendering those materials beyond reconstruction by reasonable procedures. At all times prior to physical destruction, records are in the secured custody of Iron Mountain. Upon completion, a certificate is provided, indicating that the material was destroyed by shredding.

You can identify those records eligible for destruction by reviewing a **Destruction Eligibility** or **Inventory Report**, highlighting the desired records for destruction and sending a letter of authorization with the report to Iron Mountain.

Our Data Entry department enters the desired records into the SafeKeeper PLUS inventory management system through which a destruction order is opened and a **Preliminary Destruction Listing** is generated. The **Listing(s)** are then sent to you for verification, sign-off, and subsequent return to Iron Mountain for final processing.

Iron Mountain will not destroy your inventory without the signed **Preliminary Destruction Listing(s) and instruction letter from a Destruction Authorized User at your organization.** Upon receipt of the signed **Preliminary Destruction Listing**, Data Entry will close the destruction order. Your records will be removed from storage and destroyed.

Lastly, we’ll send you a **Final Destruction Listing** which verifies that the destruction of your records, as you specified, has taken place.
FACTA OVERVIEW

In December 2003, the federal government passed the Fair and Accurate Credit Transactions Act of 2003 (FACTA). This new law affects various aspects of consumer credit.

Under FACTA, certain federal agencies were required to create regulations designed to minimize the risk of identity theft and consumer fraud by enforcing the proper destruction of consumer information. One of the resulting regulations, known as the Disposal Rule, was issued by the Federal Trade Commission in November 2004. Identical rules adopted by the federal banking agencies and the Securities and Exchange Commission now apply to organizations regulated under their authority.

Effective June 1, 2005, the Disposal Rule states that "any person who maintains or otherwise possesses consumer information for a business purpose" is required to properly dispose of the information, whether in electronic or paper form, by "taking reasonable measures to protect against unauthorized access to or use of the information in connection with its disposal."
COMPUTERIZED REPORTING
You will receive an Inventory Report to help you find your inventory — when you need it. These reports include information such as the carton barcode number, the description of carton contents, division/department assigned to the carton, arrival date, retention period and much more. Use the Reports to verify the status and complete storage history of all your records.

Your Returned Records Report tracks the cartons and files you returned to us.

Destruction Listings display those records eligible for destruction, as well as those that have already been destroyed.

Cost & Activity Reports give you an at-a-glance look at the costs and activities of your records management program. This report helps you pinpoint expenditures, control costs, and allocate expenses to individual cost centers.

GETTING STARTED
To begin using Iron Mountain’s services, several forms are available for your use. Contact Customer Response or your Account Manager to order an adequate supply of the following items:

► Access Authorization Forms
  You will need to complete one or more of these forms in order to authorize individuals from your organization to access and/or destroy your records and information.

► Division/Department Forms
  You will need one form for each division/department to establish the Division and/or Department IDs, as well as to create record codes for your records retention schedule.

► Transmittal Sheets/Transmittal Forms
  You will need multiple Sheets for multiple cartons, or one Form per carton, to catalogue the descriptive information about each carton to be sent to Iron Mountain.

► Barcode Labels
  You will need one barcode label for each carton to be stored.

► File Listing Input Sheets and Green Barcode Labels
  If you would like to individually list each file within a carton, you will need one or more File Listing Input Sheet(s) per carton depending on how many files need to be individually listed. If you use the green barcoded labels on the box, this will indicate that the entire box needs to be individually listed and there is no need to complete the File Listing Input Sheet(s).

► Interfile Labels/Document Insert Labels
  You will need one Interfile Label for each file, or one Document Insert Label per document, to be interfiled into cartons already in storage at Iron Mountain.

Additional forms are available to make working with us simple and efficient. They are discussed where appropriate throughout this Guide.

Contact Customer Response (1-800-FASTFILE) or your Account Manager for more information about the forms and labels necessary for you to prepare your records for offsite storage at Iron Mountain.
When packing records into approved storage containers for offsite storage, please follow these simple guidelines.

**ORGANIZING**

- **Group like records together.** Like records are defined by a common division, department, or record code. Organizing your records in this fashion ensures accurate retrieval histories and inventory reporting.
  
  **Example:** All payroll records from December 2002 for last names ranging between S – Z.

- **Choose a logical system of organization.** Sort the files within a carton in a logical sequence, such as by product type, line of business, customer number, employee name, etc., and, if possible, sequentially by number, alphabetically by name, or in date order.

**PACKING**

- **Letter-sized documents.** Pack files facing the end of the carton to be labeled, i.e., the *InfoPanel* located on one of the handhold sides. Make sure that they face in the same direction. Leave about an inch and a half of free space behind the last file to make retrieving files and interfiling new files easier.

- **Legal-sized documents.** Pack files from side-to-side, making sure that they all face in the same direction. Leave about an inch and a half of free space behind the last file to make retrieving files and interfiling new files easier.

**HELPFUL HINTS**

- **Don’t over-pack the carton.** Pack cartons to a maximum 90% capacity, leaving about an inch and a half of free space behind the last file. This will make it easier to retrieve files and will give you room for future interfiles. Also, a carton that’s too densely packed will be too heavy for you to comfortably lift.

- **Don’t under-pack the carton.** Files in cartons that are packed at less than 90% capacity may not remain organized, and the carton could collapse under the weight of other cartons once shelved at Iron Mountain. If a carton cannot be packed to capacity, consider combining those files with files in another carton, or keep them in-house until you have an entire carton’s worth.

- **Pack only records.** Cartons should house only Official Records (the version of a record that must be retained for the official records retention period). Convenience Records (a duplicate copy, reference material, etc., that is for reference or convenience purposes, and is not designated as an Official Record) should be discarded or handled separately.

**CARTONS FROM IRON MOUNTAIN**

Specially designed for ease of assembly, convenience, strength, and durability, Iron Mountain offers an entire line of cartons and supplies to help you with your records preparation process. They’re exactly what you need at a very affordable price. And, all of our records containers are sold in conveniently packaged incremental quantities. Refer to the *Records Management Resources* section of this *Guide* for more information.

For more information about preparing your records for offsite storage, or purchasing storage cartons and supplies, contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
Sending New Records to Iron Mountain

ESTABLISHING DIVISIONS, DEPARTMENTS, AND RECORD CODES

Most likely, your organization is structured into a logical series of business units called divisions (e.g., Outpatient Care, Hospice Care, Ambulatory), as well as departments within those divisions (e.g., Pediatrics, Cardiology, Obstetrics). You can further break down the types of records (i.e., patient charts, x-rays, ultrasound images) pertinent to each one. Ideally, you should use these same categories when preparing your records for offsite storage.

The Iron Mountain Division/Department Form helps you to:

- Organize your records
- Create a list of divisions, departments, and record codes to which your records will be assigned
- Establish retention schedules

THE DIVISION/DEPARTMENT FORM

One Division/Department Form must be completed for each new Division* and/or Department created for your account, as well as for new Record Codes. Enter the correct information in the areas indicated, clearly and legibly printing all information. Begin all entries from the left side of each field. Please note that Iron Mountain systems do not recognize leading zeros in the DIVISION ID, DEPARTMENT ID, and RECORD CODE fields. For example, Department 0001234 would be recognized as Department 1234.

*NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.

Adding a New Division and/or Department

To establish a new DIVISION, complete the Division/Department Form by printing:

a. Your four- or five-digit CUSTOMER ID.

b. Your CUSTOMER NAME.

c. The DIVISION ID* of the DEPARTMENT, using up to 12 alphanumeric characters.

  *NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.

d. The DIVISION NAME using up to 35 alphanumeric characters.

To establish a new DEPARTMENT, complete the Division/Department Form by printing the DIVISION ID of the DEPARTMENT (if you use DIVISION IDs; if not, leave the DIVISION ID field blank) and:

e. The DEPARTMENT ID using up to 12 alphanumeric characters.*

  *NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.

f. The DEPARTMENT NAME using up to 35 alphanumeric characters.

Lastly, be sure to include your NAME, DIVISION ID, DEPARTMENT ID, TELEPHONE NUMBER, FLOOR and DATE at the bottom of each Form.
Adding a New Record Code

At Iron Mountain, we refer to the structure that defines record type, descriptions, and retention lengths as a Record Code.

The ongoing and systematic establishment of RECORD CODES is most beneficial to a well-organized records management program because it clearly defines exactly how records should be consistently catalogued and may be eligible for destruction (RETENTION PERIOD). This is used if a Record Code parameter is set to “validate.” Retention will be determined by the Record Code on the carton, (AUTO CALCULATE), eliminating the need to determine a carton’s retention period as part of the Transmittal completion process.

To establish one or more new RECORD CODES, complete the Division/Department Form by printing:

a. Your CUSTOMER ID.
b. Your CUSTOMER NAME.
c. The DIVISION ID* of the DEPARTMENT, using up to 12 alphanumeric characters.
   *NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.
d. The DIVISION NAME using up to 35 alphanumeric characters.
e. The DEPARTMENT ID using up to 12 alphanumeric characters.*
   *NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.
f. The DEPARTMENT NAME using up to 35 alphanumeric characters.
g. The RECORD CODE using up to 10 alphanumeric characters.*
   *NOTE: Only customers specifically set up to use extended Record Codes should use blocks 7 through 10.
h. The RECORD CODE TITLE, the description of the records to which the code refers, using up to 28 alphanumeric characters.
i. The RETENTION SCHEDULE CODE, only customers specifically set up for valid RECORD CODES should use the RETENTION SCHEDULE CODE field.
   Y = Years  M = Months  P = Permanent  I = Indefinite  U = Undefined
   *NOTE: Customers with a RECORD CODE parameter of ‘0’ will only have access to define RECORD CODES and RECORD CODE titles.
j. The RETENTION PERIOD:
This is the number of months or years (based on the RETENTION SCHEDULE CODE) that records are assigned to a RECORD CODE and are retained before they are eligible for destruction.
*NOTE: Only if the RETENTION SCHEDULE CODE is 'M' or 'Y' should this field be used.

k. The AUTO CALCULATE CODE:
By entering one of the following codes, Iron Mountain automatically calculates a DESTROY DATE:
1 = To, Else From, Else Receipt Date  2 = Receipt Date  3 = Create Date  4 = Event Date  5 = To Date
*NOTE: Only if the RETENTION SCHEDULE CODE is 'M' or 'Y' should this field be used.

Lastly, be sure to include your NAME, DIVISION ID, DEPARTMENT ID, TELEPHONE NUMBER and EXTENSION, FLOOR and DATE at the bottom of each Form.

Automatically Assigning Destruction Dates
One of the benefits of setting up a formal records classification structure for records retention using RECORD CODES is the ability to automatically calculate the DESTROY DATE of every carton sent to Iron Mountain. This way, the burden of identifying the DESTROY DATE is removed from the Transmittal preparation process.

According to your instructions, Iron Mountain can automatically apply the correct DESTROY DATE to a carton based on the DIVISION/DEPARTMENT ID and RECORD CODE combination from the Transmittal.

To authorize Iron Mountain to use AUTO CALCULATE DESTROY DATE processing, submit a letter of authorization indicating which of the following methods of calculation should be used:

“To, Else From, Else Receipt Date” Processing
Assigns the DESTROY DATE based on the TO DATE, indicated on the Transmittal, plus the TOTAL RETENTION LENGTH for the corresponding RECORD CODE (if there’s no TO DATE, the FROM DATE will be used; if no FROM DATE, then the RECEIPT DATE).

“Receipt Date” Processing
Assigns the DESTROY DATE based on the RECEIPT DATE on inventory plus the Iron Mountain RETENTION LENGTH for the corresponding RECORD CODE.

“Create Date” Processing
Assigns the DESTROY DATE based on the CREATE DATE on inventory plus the Iron Mountain RETENTION LENGTH for the corresponding RECORD CODE. If the CREATE DATE is blank, a DESTROY DATE or DESTRUCTION INDICATOR must be entered.

“Event Date” Processing
Assigns the DESTROY DATE based on the EVENT DATE on inventory plus the Iron Mountain RETENTION LENGTH for the corresponding RECORD CODE. If the EVENT DATE is blank, a DESTROY DATE or DESTRUCTION INDICATOR must be entered.

“To Date” Processing
Assigns the DESTROY DATE based on the TO DATE, indicated on the Transmittal, plus the TOTAL RETENTION LENGTH for the corresponding RECORD CODE. If the TO DATE is blank, a DESTROY DATE or DESTRUCTION INDICATOR must be entered.

Contact Customer Response or your Account Manager for more information about creating an appropriate records retention program for your organization and how to use the Division/Department Form.
Sending New Records to Iron Mountain

COMPLETING THE TRANSMITTAL/USING THE BARCODE LABEL

A Transmittal is the medium by which a carton’s descriptive information is captured. Iron Mountain provides three types of Transmittals:

- The easy-to-complete, multi-carton Transmittal Sheet
- The easy-to-complete, one-carton-at-a-time Transmittal Form
- Online data entry by using the Iron Mountain Connect records management portal

The Transmittal Sheet and Transmittal Form are offline methods. The Transmittal Sheet accommodates the descriptive information for up to five cartons per Sheet. The Transmittal Form, in triplicate copy, accepts only one carton per Form. Online data entry is available in limited capacity to some Iron Mountain Connect users who are authorized to access the Inventory Maintenance menu. Contact Customer Response or your Iron Mountain Account Manager for more information about online data entry.

The method you use will depend on how your account is setup. Regardless of the method, however, all descriptive information that is captured is provided back to you via inventory reports generated by Iron Mountain.

The Transmittal Sheet
Complete one Transmittal Sheet for each group of five new cartons to be stored at Iron Mountain. Enter the correct information in the areas indicated, clearly and legibly printing all information. Begin all entries from the left side of each field except where noted. Please note that the Iron Mountain systems do not recognize leading zeros in the DIVISION ID, DEPARTMENT ID, and RECORD CODE fields. For example, Department 0001234 would be recognized as Department 1234.
Complete the Transmittal Sheet by printing:

a. Your four- or five-digit CUSTOMER ID on both the Transmittal Sheet and large peel-off Barcode Label (this is a must).

b. Your CUSTOMER NAME.

c. The DIVISION ID* of the DEPARTMENT, using up to 12 alphanumeric characters.
   *NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.

d. The DEPARTMENT ID of the new cartons, using up to 12 alphanumeric characters.*
   *NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.

e. The CUSTOMER BOX NUMBER for each carton. This field should only be completed if you specifically assign a carton number other than the SafeKeeper PLUS (SKP) BARCODE NUMBER for your internal tracking purposes.

f. The RECORD CODE using up to 10 alphanumeric characters.*
   *NOTE: Only customers specifically set up to use extended Record Codes should use blocks 7 through 10. If the RECORD CODE parameter is set to ‘1’ or ‘2,’ then anything in the DESTROY DATE or DESTRUCTION INDICATOR will be ignored by the system and overridden by the RECORD CODE rules. Only if the parameter is set to ‘0’ or ‘3,’ will the system consider these values.

g. The DATE RANGE/FROM and DATE RANGE/TO, which are the oldest and most recent dates of the records contained in the carton. Retention can be calculated from these dates. Only valid dates including month, day and year are acceptable here.

h. The ALPHA/NUMERIC RANGE-FROM and ALPHA/NUMERIC RANGE-TO, which are the beginning and ending alphabetical/numerical ranges of the records contained in the carton. The FROM and TO Alpha/Numeric Range fields can be used to describe a name range (Jones through Smith), a numeric “File ID” range (20450 through 20567), or an alphanumeric “File ID” range (AD123 through BZ784).

i. The CREATE DATE, which is the date that the materials were packaged and labeled for storage or the date that the records were actually created. Retention can be calculated from these dates. Only a valid date including month, day and year is acceptable here.

j. The EVENT DATE, which is the date of the event that the contents of the carton contains, if applicable. Retention can be calculated from this date. Only a valid date including month, day and year is acceptable here.

k. The DESTRUCTION ELIGIBILITY identifies when a carton is scheduled for destruction. Leave this section blank if your organization establishes DESTRUCTION ELIGIBILITY using RECORD CODES. If your organization does not use RECORD CODES to determine when a carton is eligible for destruction, enter either a valid Destruction Date (month/day/year) or check one of the DESTRUCTION INDICATORS: Permanent or Undefined.
   *NOTE: Nothing will be destroyed automatically. A letter of authorization from your organization is required for destruction.

l. The HOLD CODE for each carton extends the RETENTION PERIOD of a carton. HOLD CODES must be set up on the system prior to use. If records should be retained permanently, select the check box under DESTRUCTION ELIGIBILITY.

m. The MAJOR DESCRIPTION of the contents of the carton as it is to appear on the Inventory Reports provided by Iron Mountain.
   Example: ALE - AMA or 100 - 999 (alpha or numeric ranges must be separated with a dash).
   Example: CORRESPONDENCE (complete descriptions may be spelled out).
   *NOTE: To keep numeric ranges in the proper sort sequence and to maintain an orderly listing, the dash ‘-’ should be placed to the right of the heavy vertical line; fields should be zero-filled where necessary.
If the files within the carton will be individually listed, print the phrase “Individual List” in the MAJOR DESCRIPTION field.

n. Print additional MINOR DESCRIPTION information as it is to appear on your Inventory Reports (follow the instructions for MAJOR DESCRIPTION).

o. The REFERENCE #1 field, which is a miscellaneous, alphanumeric field used for additional cross-reference information about the carton.

p. Your name in the PREPARER’S FULL NAME field, as well as the DATE, your DIVISION ID, DEPARTMENT ID, TELEPHONE NUMBER and EXTENSION, and FLOOR. At the top of the Sheet, be sure to number the pages in sequence, starting with “Page 1.”

q. Place the large peel-off Barcode Label on the carton’s InfoPanel in the area marked “Affix Transmittal Label Here” on one of the handhold sides. Make sure your Customer ID is also displayed on the Label.

Place the smaller, identically numbered Barcode Label on the Transmittal Sheet in the area marked “Place the SafeKeeper PLUS Barcode Label (T-Label) Here.”

r. Once you have completed all of the Transmittal Sheets for this group of cartons you are sending, count the total number of Sheets and place this total number on all of the Sheets in the space marked “Page ____ of ____.” Staple the Sheets together, in order.

s. Have the originals ready for the driver to pick up with the new cartons. Make photocopies of the Transmittal Sheets for your records.

t. Verify that the physical carton count matches the itemization on the Transmittal Sheets.

u. Contact Iron Mountain to schedule a pick up.

NOTE: To ensure the accuracy and integrity of your inventory requirements, please review all information listed on the transmittal document to ensure it is complete, accurate and legible, and that the document has not been folded or torn before it is submitted to Iron Mountain.

For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.
THE TRANSMITTAL FORM

As an alternative to the Transmittal Sheet, Iron Mountain also offers the three-ply Transmittal Form, which allows you to provide all of the information required to properly index your records one carton at a time.

Completing the Transmittal Form

Complete one Transmittal Form for each new carton to be stored at Iron Mountain. Enter the correct information in the areas indicated, clearly and legibly printing all information. Begin all entries from the left side of each field. Please note that the Iron Mountain systems do not recognize leading zeros in the DIVISION ID, DEPARTMENT ID, and RECORD CODE fields. For example, Department 0001234 would be recognized as Department 1234.

1. Complete the Transmittal Form by printing:
   a. Your four- or five-digit CUSTOMER ID on both the Transmittal Form and the peel-off Barcode Label (this is a must).
   b. Your CUSTOMER NAME.
   c. The DIVISION ID* of the DEPARTMENT, using up to 12 alphanumeric characters.
      *NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.
   d. The DEPARTMENT ID of the new carton, using up to 12 alphanumeric characters.*
      *NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.
   e. The RECORD CODE using up to 10 alphanumeric characters.*
      *NOTE: Only customers specifically set up to use extended Record Codes should use blocks 7 through 10. If the RECORD CODE parameter is set to ‘1’ or ‘2,’ then anything in the DESTROY DATE or DESTRUCTION INDICATOR will be ignored by the system and overridden by the RECORD CODE rules. Only if the parameter is set to ‘0’ or ‘3,’ will the system consider these values.
   f. The DATE RANGE/FROM and DATE RANGE/TO, which are the oldest and most recent dates of the records contained in the carton. Retention can be calculated from these dates. Only valid dates including month, day and year are acceptable here.
   g. The CREATE DATE, which is the date that the materials were packaged and labeled for storage or the date that the records were actually created. Retention can be calculated from these dates. Only a valid date including month, day and year is acceptable here.
   h. The ALPHA/NUMERIC RANGE-FROM and ALPHA/NUMERIC RANGE-TO, which are the beginning and ending alphabetical/numerical ranges of the records contained within the carton. The FROM and TO Alpha/Numeric Range fields can be used to describe a name range (Jones through Smith), a numeric “File ID” range (20450 through 20567), or an alphanumeric “File ID” range (AD123 through BZ784).
i. The **EVENT DATE**, which is the date of the event that the contents of the carton contains, if applicable. Retention can be calculated from this date. Only a valid date including month, day and year is acceptable here.

j. The **REFERENCE #1** field, which is a miscellaneous, alphanumeric field used for additional cross-reference information about the carton.

k. The **MAJOR DESCRIPTION** of the contents of the carton as it is to appear on the Inventory Reports provided by Iron Mountain.

   **Example:** ALE - AMA or 100 - 999 (alpha or numeric ranges must be separated with a dash).

   **Example:** CORRESPONDENCE (complete descriptions may be spelled out).

   **NOTE:** To keep numeric ranges in the proper sort sequence and to maintain an orderly listing, the dash ‘-’ should be placed to the right of the heavy vertical line; fields should be zero-filled where necessary.

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   If the files within the carton will be individually listed, print the phrase “Individual List” in the **MAJOR DESCRIPTION** field.

l. Print additional **MINOR DESCRIPTION** information as it is to appear on your Inventory Reports (follow the instructions for **MAJOR DESCRIPTION**).

m. The **HOLD CODE** for each carton extends the **RETENTION PERIOD** of a carton. **HOLD CODES** must be set up on the system prior to use. If records should be retained permanently, select the check box under **DESTRUCTION ELIGIBILITY**.

n. The **DESTRUCTION ELIGIBILITY** identifies when a carton is scheduled for destruction. Leave this section blank if your organization establishes **DESTRUCTION ELIGIBILITY** using **RECORD CODES**. If your organization does not use **RECORD CODES** to determine when a carton is eligible for destruction, enter either a valid **Destruction Date** (month/day/year) or check one of the **DESTRUCTION INDICATORS**: **Permanent** or **Undefined**.

   **NOTE:** Nothing will be destroyed automatically. A letter of authorization from your organization is required for destruction.

o. The **CUSTOMER BOX NUMBER** for each carton. This field should only be completed if you specifically assign a carton number other than the **SafeKeeper PLUS (SKP) BARCODE NUMBER** for your internal tracking purposes.

p. Your name in the **PREPARER’S FULL NAME** field, as well as the **DATE**, your **DIVISION ID**, **DEPARTMENT ID**, **TELEPHONE NUMBER** and **EXTENSION**, and **FLOOR**.

2. Place the peel-off **Barcode Label** from the Transmittal Form on the carton’s **InfoPanel** in the area marked “Affix Transmittal Label Here” on one of the handhold sides. Make sure your Customer ID is also displayed on the **Label**.

3. Place the **pink copy** of the Transmittal Form inside the carton on top of the files underneath the lid; Retain the **yellow copy** for your records; and, Present the white copy to the Iron Mountain driver along with the new cartons to be picked up.

4. Verify that the physical carton count matches the quantity of white copies of the Transmittal Form.

5. Contact Iron Mountain to schedule a pick up.

*For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.*
Some Customers elect to catalogue **file-level** information such as file name and/or file number for each file within a carton. This process is called **Individually Listing** your files.

Iron Mountain **File Listing Input Sheets** are designed to help you list the files within a carton in a logical and orderly fashion and are available based on your type of business:

- **The green Standard File Listing Input Sheet**, generic enough for most organizations
- **The brown Law File Listing Input Sheet** for law firms and those in the legal profession

File-level descriptive information entered on the **Standard** or **Law File Listing Input Sheets** will subsequently appear on the **File Inventory** produced by Iron Mountain. Although individual files can be retrieved regardless of whether or not they have been Individually Listed, a complete file-level inventory report is a valuable tool because it provides full and accurate information about each file at a micro level. The individual files and all of the information about them are then available online as you place orders.

Iron Mountain can help you with the maintenance of your professional records management program by Individually Listing the contents of each carton that you send to us. Contact Customer Response or your Iron Mountain Account Manager for more information.

**INDIVIDUALLY LISTING IS A TWO-STEP PROCESS**

When you make the decision to Individually List your files, you will need to complete a **Transmittal Sheet** in order to capture the **carton-level** information, as well as a **File Listing Input Sheet** to capture the **file-level** descriptive information.

**Completing the Transmittal Sheet**

For each carton of files to be individually listed:

1. Include all pertinent carton information on the **Transmittal Sheet**, including the Iron Mountain **CUSTOMER ID** and **DESTRUCTION ELIGIBILITY**. Additionally, the phrase “Individual List” should be written in the **MAJOR DESCRIPTION** field.

2. For each carton that contains files to be individually listed: Place the large peel-off **green-bordered Barcode Label** (i.e., **Green T-Label**) on the carton’s **InfoPanel** in the area marked “Affix Transmittal Label Here” on one of the handhold sides. Make sure your Customer ID is also displayed on the Label. Place the smaller, identically numbered **green-bordered Barcode Label** on the **Transmittal Sheet** in the area marked “Place the SafeKeeper PLUS Barcode Label (T-Label) Here.”

   The **green** border on the **Barcode Label** alerts Iron Mountain Data Entry that the contents of the carton should be individually listed.

**Completing the File Listing Input Sheet**

Complete the appropriate **File Listing Input Sheet** for each carton of files that you would like to have individually listed. Multiple **File Listing Input Sheets** may be needed to list all of the files within a particular carton. Always begin with a new **File Listing Input Sheet** when describing a new carton of records.
THE STANDARD FILE LISTING INPUT SHEET
Use the green Standard File Listing Input Sheet for virtually any type of business and file type.

1. Complete the Standard File Listing Input Sheet by printing:
   a. Your four- or five-digit CUSTOMER ID.
   b. Your CUSTOMER NAME.
   c. The CUSTOMER BOX NUMBER (provided that you assign your own carton numbers) and SafeKeeper PLUS (SKP) BARCODE NUMBER of the files listed on this Sheet.
   d. The DIVISION ID* of the DEPARTMENT, using up to 12 alphanumeric characters.
      *NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.
   e. The DEPARTMENT ID of the file, using up to 12 alphanumeric characters.*
      *NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.
   f. The RECORD CODE, using up to 10 alphanumeric characters.* This information should match the Transmittal Sheet.
      *NOTE: Only customers specifically set up to use extended Record Codes should use blocks 7 through 10.
   g. The SOCIAL SECURITY NUMBER** of the individual on this file, if applicable.
      NOTE: Use of social security numbers in California may be prohibited. Iron Mountain recommends that Customers in California who wish to include social security numbers first consult with their Legal Counsel.
   h. The DATE RANGE/FROM and DATE RANGE/TO, which are the oldest and most recent dates of this file. Only valid dates including month, day and year are acceptable here.
   i. The CREATE DATE, which is the date that the file was packaged and labeled for storage or the date that the file was actually created. Only a valid date including month, day and year is acceptable here.
   j. The BIRTH DATE** of the individual on this file, if applicable. Only a valid date including month, day and year is acceptable here.
   k. The DESTROY DATE, which is the date that the file should be reviewed for destruction. Only a valid date including month, day and year is acceptable here. This information should match the Transmittal Sheet; check PERM if the file is to be retained Permanently.
   l. The DISCHARGE DATE, which is the date that the individual on this file was released from care, if applicable. Only a valid date including month, day and year is acceptable here.
m. The VOL# (Volume Number), which is a quantity of files that makes up one file unit.

n. The description(s) of each file, using FILE DESCRIPTION 1 and FILE DESCRIPTION 2.

o. Additional descriptions of each file, using FILE DESCRIPTION 3 and FILE DESCRIPTION 4.

p. The ALPHA/NUMERIC RANGE-FROM and ALPHA/NUMERIC RANGE-TO, which are the beginning and ending alphabetical/numerical ranges of the records contained within the carton. The FROM and TO Alpha/Numeric Range fields can be used to describe a name range (Jones through Smith), a numeric “File ID” range (20450 through 20567), or an alphanumeric “File ID” range (AD123 through BZ784). This information should match the Transmittal Sheet.

q. Your name in the PREPARER’S FULL NAME field, as well as the DATE, your DIVISION ID, DEPARTMENT ID, TELEPHONE NUMBER and EXTENSION, and FLOOR.

**NOTE:** Regarding the use of social security numbers and birth dates: Use of these fields constitutes personal data that may be protected by privacy laws. Iron Mountain is happy to include this data, and the furnishing of such data by the Customer constitutes the Customer’s consent to its inclusion on Iron Mountain’s inventory management systems.

2 Once you have completed all of the Standard File Listing Input Sheets for this group of files you are Individually Listing, count the total number of Sheets and place this total number on all of the Sheets in the space marked “Page _____ of _____.“ Staple the Sheets together, in order.

3 Have the originals ready for the driver to pick up with the new cartons. Make photocopies of the Standard File Listing Input Sheets for your records.

4 Verify that the physical file count matches the itemization on the Standard File Listing Input Sheets.

5 Contact Iron Mountain to schedule a pick up.

For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.
The Law File Listing Input Sheet is tailored specifically for those in law firms and the legal profession. If your company’s files are maintained in Iron Mountain’s LAW format, then use the brown Law File Listing Input Sheet for listing individual legal file information.

Complete the Law File Listing Input Sheet by printing:

a. Your four- or five-digit CUSTOMER ID.

b. Your CUSTOMER NAME.

c. Your name in the COMPLETED BY field, as well as the DATE and your TELEPHONE NUMBER and EXTENSION.

d. The CUSTOMER BOX NUMBER (provided that you assign your own carton numbers) and SafeKeeper PLUS (SKP) BARCODE NUMBER of the files listed on this Sheet.

e. The initials of as many as two contributors to this file in the LAWYER 1 and LAWYER 2 fields.

f. The CLIENT NUMBER and MATTER NUMBER that correspond to this file.

g. Use the LETTER and SUB NUMBER fields as you desire.

h. The CLIENT NAME and MATTER DESCRIPTION of this file.

i. Use the TYPE and # FILES as you desire.

j. The CLOSE DATE of this file. Only a valid date including month, day and year is acceptable here.

k. The DESTROY DATE, which is the date that the file should be reviewed for destruction. Only a valid date including month, day and year is acceptable here. This information should match the Transmittal Sheet; check PERM if the file is to be retained Permanently.

l. The ALPHA/NUMERIC RANGE-FROM and ALPHA/NUMERIC RANGE-TO, which are the beginning and ending alphabetical/numerical ranges of the files within the carton in which this file is stored. The FROM and TO Alpha/Numeric Range fields can be used to describe a name range (Jones through Smith), a numeric “File ID” range (20450 through 20567), or an alphanumeric “File ID” range (AD123 through BZ784). This information should match the Transmittal Sheet.
**NOTE:** Regarding the use of social security numbers and birth dates: Use of these fields constitutes personal data that may be protected by privacy laws. Iron Mountain is happy to include this data, and the furnishing of such data by the Customer constitutes the Customer’s consent to its inclusion on Iron Mountain’s inventory management systems.

2 Once you have completed all of the **Law File Listing Input Sheets** for this group of files you are Individually Listing, count the total number of **Sheets** and place this total number on all of the **Sheets** in the space marked “Page _____ of _____.“ Staple the **Sheets** together, in order.

3 Have the **originals** ready for the driver to pick up with the new cartons. Make photocopies of the **Law File Listing Input Sheets** for your records.

4 Verify that the physical file count matches the itemization on the **Law File Listing Input Sheets**.

5 Contact Iron Mountain to schedule a pick up.

*For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this **Guide**.*
PLACING YOUR ORDER

Regardless of the type of order you’re placing or the method you’re using to place your order, you’ll be asked to verify and/or provide some basic information along with the specifics related to your order.

1. Your four- or five-digit CUSTOMER ID.
2. Your CUSTOMER NAME.
3. The DIVISION ID, if applicable. Must be established prior to use. Contact Customer Response or your Account Manager for more information.
4. The DEPARTMENT ID if departmentalized billing for services performed is used. If one department is placing the request but another department is being billed, you may note both departments on the order.
5. The AUTHORIZED USER, a representative from your organization who is permitted to access your account, and his/her PASSWORD, if applicable.
6. Your PURCHASE ORDER NUMBER, if applicable.
7. The desired ORDER TYPE: Retrieval, Fax and Refile, Internal Project, Permanent Withdrawal, Pick up, or Supplies.
8. The LOCATION, including ADDRESS, FLOOR, NAME, PHONE NUMBER, EXTENSION, and EMAIL ADDRESS of the person who will be receiving the delivery or who is responsible for the pick up.

To RETRIEVE cartons or files from storage, you’ll need:

- The CUSTOMER BOX NUMBER or SafeKeeper PLUS (SKP) BARCODE NUMBER (the SKP BARCODE NUMBER is especially important if your CUSTOMER BOX NUMBERS repeat).
- For individual files, describe, specifically, the record needed. Include the CUSTOMER BOX NUMBER or SKP BARCODE NUMBER. If your files are individually listed, you may use either the FILE DESCRIPTION or the FILE SEQUENCE NUMBER from your most recent File Inventory Report.
- Any SPECIAL INSTRUCTIONS or restrictions regarding the delivery.

To request a PICK UP, you’ll also need to provide:

- The type of records to be picked up: New Cartons, Entire Carton Refiles, Individual File Refiles, Interfiles, or Tapes/Vital Records.
- The exact QUANTITY and SIZE of the cartons and/or number of files so that an appropriately sized vehicle can be dispatched.
- Any SPECIAL INSTRUCTIONS or restrictions regarding the pick up.

To order SUPPLIES, you’ll also need to provide:

- The CARTON TYPE, DESCRIPTION, or DIMENSIONS of the carton or the TITLE or FORM NUMBER of the form you need.
- The exact QUANTITY desired (typically packaged in incremental quantities).
- Any SPECIAL INSTRUCTIONS or restrictions regarding the delivery.

10. The desired SERVICE LEVEL, which is based on your contract, the ORDER TYPE selected, and the time your order was placed. Options include: Next Day, Half Day, Rush, After-Hours Rush.
Sending New Records to Iron Mountain

AN ACKNOWLEDGEMENT OF YOUR TRANSACTION

YOUR IRON MOUNTAIN ORDER NUMBER
When you place your order via Iron Mountain Connect or by telephone, Iron Mountain will provide you with an ORDER NUMBER which confirms that the order was accepted. Please make a note of it because it will appear on all documentation generated as a result of this transaction.

When you use any other order placement method and you require an ORDER NUMBER, please clearly state that on your request. An Iron Mountain Representative will be happy to call, fax, or email the order number to you.

REVIEWING YOUR PACKING SLIP
The Packing Slip is a comprehensive acknowledgement of your order. It ensures accurate communication between Iron Mountain and you and is designed to provide pertinent, order-specific information. The Iron Mountain driver will give you a copy of the Packing Slip. Save this copy for your records. Packing Slips may include multiple pages and will vary depending on the type of order being fulfilled, but certain features appear on all:

- **a.** The ORDER NUMBER, as well as your CUST[OMER] ID, DIVISION ID, and/or DEPARTMENT ID. If the order was charged to a Division/Department other than the ordering Division/Department, that information will display next to BILL DIV and BILL DEPT.
- **b.** ATTENTION (CONTACT) NAME and SHIP TO ADDRESS with PHONE NUMBER.
- **c.** DATE and SERVICE LEVEL of the order.
- **d.** ORDER-LEVEL SPECIAL INSTRUCTIONS (INST) regarding this order enable prompt and accurate pick ups and deliveries.
- **e.** The DATE and TIME you placed the order, as well as how the order was received by Iron Mountain.
- **f.** The SKP ID (SafeKeeper PLUS BARCODE NUMBER) and CUSTOMER BOX NUMBER. EB (Entire Carton) or IF (Individual File) describes the type (TY) of item requested.
- **g.** Details and descriptions about each service transaction at the carton or file level. SPECIAL INSTRUCTIONS, which pertain to this order line only, appear here. DESCRIPTION/DISPOSITION relays pertinent information regarding the item.
- **h.** The FND column indicates whether the item requested was Found or Not Found (YES or NO).
- **i.** An EXTRA ACTIONS field displays the type of extra action(s) taken for that particular item, if any, as well as the quantity of actions performed.
- **j.** A Packing Slip Summary displays the total number of Found items (LINES PICKED), Not Found items (LINES NOT PICKED), EXTRA ACTIONS taken, if any, and, the total number of BOXES, PACKAGES, and STORAGE UNITS.
- **k.** The PK ID column indicates the Package ID Number that contains the individual file listed on the Packing Slip. This is only applicable to individual file items on the Order. The Package ID can be found on the Package Label affixed to the outside of any package containing individual files.

Customer and driver signatures appear on Iron Mountain Daily Vehicle Logs and validate services performed.
REVIEWING YOUR PACKAGE LABEL FOR INDIVIDUAL FILE DELIVERY

When your individual file orders are delivered, Iron Mountain now affixes a Package Label to the outside of each package that is used for delivery. For larger orders, Iron Mountain may place the individual files into a box for easier handling and delivery. When the files are retrieved, each individual file is scanned and matched to the Package Label to confirm what files were delivered in which package. The barcoded Package Label contains information that matches corresponding information on the Packing Slip. For individual files, the Package Label is scanned upon delivery to ensure the correct package is delivered.

Standard features of the hard-copy Package Label include:

a. ORDER NUMBER and ROUTE ID.

b. SERVICE DATE.

c. CUSTOMER ID and COMPANY NAME for Delivery.

d. The PACKAGE NUMBER can be matched with the PK ID column on the Packing Slip so you know what files are in what package before opening the package.
SENDING INTERFILES TO IRON MOUNTAIN

An interfile is defined as a file to be placed within an existing carton, or on an open file shelf, at Iron Mountain. In order to provide accurate tracking and documentation, an Interfile Label must be applied to each interfile being sent to storage at Iron Mountain.

COMPLETING THE INTERFILE LABEL

A blue Interfile Label is applied to a new individual file to be placed within a carton, or on an open file shelf, at Iron Mountain. Complete one Interfile Label for each file to be interfiled. Insert the correct information in the areas indicated, clearly and legibly printing all information.

1. Complete the Interfile Label by printing:
   a. Your four- or five-digit CUSTOMER ID.
   b. The FILE ID or FILE DESCRIPTION of the file to be interfiled.
   c. The CUSTOMER BOX NUMBER (provided that you assign your own carton numbers) or SafeKeeper PLUS (SKP) BARCODE NUMBER of the carton in which this interfile should be filed.

2. Place the Interfile Label on the file, retaining the carbon for your reference.

3. Contact Iron Mountain to schedule a pick up.

For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.
A document insert is defined as a document to be placed within an existing file, or on an open file shelf, at Iron Mountain. In order to provide accurate tracking and documentation, a Document Insert Label must be applied to each document insert being sent to storage at Iron Mountain.

COMPLETING THE DOCUMENT INSERT LABEL
A red Document Insert Label is applied to a new document to be inserted inside a file within a carton, or on an open file shelf, at Iron Mountain. Complete one Document Insert Label for each document to be interfiled. Insert the correct information in the areas indicated, clearly and legibly printing all information.

1. Complete the Document Insert Label by printing:
   a. Your four- or five-digit CUSTOMER ID.
   b. The FILE NAME or FILE NBR of the file in which this document is to be interfiled.
   c. The CUSTOMER BOX NUMBER (provided that you assign your own carton numbers) or SafeKeeper PLUS (SKP) BARCODE NUMBER of the carton where the file is located in which this document should be interfiled.

2. Place the Document Insert Label on the document, retaining the carbon for your reference.

3. Contact Iron Mountain to schedule a pick up.

For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.
RETURNING PREVIOUSLY RETRIEVED RECORDS BACK TO STORAGE AT IRON MOUNTAIN

In order to maintain a well-controlled records management program, the timely return of previously retrieved items to the record center is critical.

Outcards are created and retained for individual files that have been retrieved from storage. Retrieval information is kept as history on both the Outcard and Iron Mountain’s systems. This information is then automatically updated upon the return and subsequent barcode scanning of the items back into storage and, ultimately, to their shelf locations.

RETURNING RECORDS TO STORAGE

Returning previously retrieved records to storage at Iron Mountain is a three-step process:

1. For ease of counting later on, separate the records you are returning to storage into:
   - Individual Files
   - Entire Cartons
   - Tapes/Vital Records
   - Interfiles
     • Files
     • Documents

2. Count how many of each item you have. For Entire Carton refiles, please note how many there are of each carton model [size].
   
   **Example:** There are 10 entire carton refiles: five are letter/legal model #2000, and five are legal transfer model #550. Knowing the carton model numbers helps determine each carton’s cubic footage, which helps Iron Mountain schedule an appropriately sized vehicle to pick up your records.

   For Individual File Refiles, please specify the quantity of files and individual documents.

3. Contact Iron Mountain to schedule a pick up.

For detailed information about placing orders with Iron Mountain, refer to the Placing Requests and Orders section of this Guide.
Using Third-Party Transportation

**GUIDANCE ON HOW TO PREPARE A THIRD-PARTY TRANSPORTATION SERVICE**

**Shipments from your location to Iron Mountain**
(Third-Party Examples: UPS®, FedEx®, etc., from your location to Iron Mountain.)

The following steps must be completed prior to shipping your material via third-party transportation:

1. Verify the Iron Mountain delivery address by contacting Iron Mountain prior to placing an order and shipping material.

2. Place a pick-up order with Iron Mountain for your shipment by contacting Iron Mountain’s Customer Response at 1-800-FAST FILE or orders@ironmountain.com.

   **Include the following information on your order:**
   - Number of pieces on the shipment.
   - Estimated date of arrival.
   - Name of delivering third-party transportation company.

3. Secure material for shipment. Ensure boxes are properly labeled with SKP barcodes (unless you have made prior arrangements with Iron Mountain to have your items barcoded for you by Iron Mountain or your shipment is a box of re-file files that belong inside other boxes currently stored at Iron Mountain) and all lids are properly secured.

4. Complete the shipping paperwork (example: FedEx.com, UPS.com, bill of lading, shipping manifest, etc.).

   **Include the following information on the shipping paperwork:**
   - Iron Mountain as the recipient.
   - Your customer account number.
   - Reference the Iron Mountain order number.
   - Your Company name and an Authorized User on your account with contact information.
   - The contact name and phone number of the shipping party (e.g., UPS, FedEx, etc.).
   - The number of boxes/elements being delivered.

Additionally, it is important to understand that, although Iron Mountain will make every attempt to resolve problems if they occur, failure to place the order with Iron Mountain in advance or to clearly identify your Company name, contact information, account number and Iron Mountain’s order confirmation number may result in shipments being refused.

If boxes/elements are damaged or missing inventory per content description provided by the customer, Iron Mountain will inform the shipping company and contact the customer to further investigate.
Using Customer Reports

**PERIODIC AND SPECIAL REPORTING**

Detailed reports are provided to you by Iron Mountain for your use in tracking and managing your records management program. All reporting is available in an 8.5” x 11” laser-printed format for your convenience or, if you wish, in a number of electronic transmission formats such as the Iron Mountain Connect records management portal, email, electronic file transfer, or CD-ROM.

**THE INVENTORY REPORT**

An Inventory Report may be generated by contacting Customer Response or by placing a direct order through the Report Center in Iron Mountain Connect.

Standard informational fields provided in this report include:

- **DIVISION ID**
- **DEPARTMENT ID**
- **RECORD CODE**
- **FROM DATE**
- **TO DATE**
- **MAJOR DESCRIPTION**
- **MINOR DESCRIPTION**
- **CUSTOMER BOX NUMBER**
- **RECEIPT DATE**
- **DESTROY DATE**
- SafeKeeper PLUS (SKP) BARCODE NUMBER
- CUBIC FOOTAGE
- STATUS

All inventory is automatically sorted in the following manner (unless you have specifically requested a customized sort):

**DIVISION ID, DEPARTMENT ID, RECORD CODE, FROM DATE, TO DATE, MAJOR DESCRIPTION, MINOR DESCRIPTION, CUSTOMER BOX NUMBER.**

**Using the Inventory Report**

The Inventory Report is cumulative and represents all carton or individually listed file inventory that you currently maintain with Iron Mountain.

Your most recent Inventory Report should be used in preparation for any service transaction with Iron Mountain. This includes, but is not limited to, retrievals, internal projects, permanent withdrawals, destruction, and carton-level inventory maintenance.

Simply access the inventory by finding the **DIVISION ID, DEPARTMENT ID, and then the RECOR**D CODE of the carton or individually listed file you are researching, and scan across the page to review the inventory description.
The Returned Records Report. The Returned Records Report includes information about cartons and files that have been returned to Iron Mountain (i.e., refilled) during the prior month. The date range included on the report is clearly listed at the top of each page. All inventory refilled during the prior month is automatically sorted in the following manner:

PICK UP ORDER NUMBER and BILL TO DEPT ID, REFILE DATE, DEPARTMENT ID from inventory, CUSTOMER BOX NUMBER, SafeKeeper PLUS (SKP) BARCODE NUMBER, FILE SEQUENCE NUMBER, REFILE TYPE (EB: Entire Carton or IF: Individual File), and FILE DESCRIPTION.

The Returned Records Report is a monthly recap of all of your cartons and files that have been refilled at Iron Mountain during the prior month for the DATE RANGE specified. If no cartons or files were returned to Iron Mountain in the prior month, then a Returned Records Report is not generated.

The ORDER NUMBER, REFILE DATE, DEPARTMENT ID from the inventory record, CUSTOMER BOX NUMBER, SafeKeeper PLUS (SKP) BARCODE NUMBER, FILE SEQUENCE NUMBER (for Individual File refiles), REFILE TYPE, STORAGE UNITS, and FILE DESCRIPTION are all listed for your convenience.

You can review the Returned Records Report by ORDER NUMBER and REFILE DATE. The TOTAL STORAGE UNITS for both carton refiles and individual file refiles are listed at the end of the report and may be used for Invoice reconciliation.
MANAGEMENT REPORTING
There are several management reports that are available to you through Iron Mountain. These reports will help you to:

- Manage your records program
- Maintain records retention schedules in records classification form
- Review cost allocations of your program for a designated time frame
- Prepare your records for destruction

The most commonly requested management reports are the Records Classification Report, the Cost & Activity Report, the Retrieval History Report, and the Authorized Users Report. Contact Customer Response or your Account Manager for assistance in deciding which inventory and/or management reports are appropriate for your organization.

The Records Classification Report. The Records Classification Report displays the DIVISION ID, DEPARTMENT IDs, and RECORD CODES on file with Iron Mountain for your CUSTOMER ID. The report sorts by DIVISION ID and DEPARTMENT ID, listing the following: DIVISION ID, DIVISION NAME, DEPARTMENT ID, DEPARTMENT NAME, RECORD CODE, RECORD CODE TITLE, TOTAL RETENTION, RETENTION SCHEDULE, AUTOCALCULATE CODE, and DIVISION/DEPARTMENT STATUS. If HOLD CODES are used, the HOLD CODE and the HOLD CODE DESCRIPTION will also be shown.

The USER ID of the person who last modified the RECORD CODE and the RETENTION TRANSACTION DATE of the last modification is also displayed.

This report can be requested for one specific DIVISION/DEPARTMENT ID or for all DIVISIONS and/or DEPARTMENT IDs, with or without page breaks on the report.
**The Cost & Activity Report.** The Cost & Activity Report displays billing activity for a specified **DATE RANGE.** It can be used for cost allocation, as well as budget preparation or review. The **DATE RANGE** of the information included is clearly noted in the heading of the report.

For the **DATE RANGE** specified, all billing transactions are totaled and the following fields are displayed: **QUANTITY, BILLCODE, BILLCODE DESCRIPTION, RATE, EXTENDED AMOUNT, SALES [TOTAL] TAX, and GRAND TOTAL.**

**The Retrieval History Report.** The Retrieval History Report displays the retrieval and refile activity history of cartons and files for a particular **DATE RANGE.** It can also be generated for inventory that has been permanently withdrawn or destroyed. The report sort and **DATE RANGE** of the activity history are identified in the report title, while the **CUSTOMER NAME** and **REQUESTING DIVISION** and/or **REQUESTING DEPARTMENT** titles are displayed in the report header.

Inventory matching the specified **DATE RANGE** and **STATUS OPTION** (OUT[carded], WTH[withdrawn], and DST [destroyed]) are displayed in the report body along with the: **SafeKeeper PLUS (SKP) BOX NUMBER** (barcode number), **CUSTOMER BOX NUMBER, REFERENCE 1 BOX NUMBER, REFERENCE 2 BOX NUMBER, TYPE** of inventory item requested: **EB:** Entire Carton or **IF:** Individual File, **REQUEST DATE, REFILE DATE, REFILE SEQ[ence] Number, FILE DESCRIPTION, CONTACT person’s name, DIVISION ID and DEPT ID, the **REQUESTING DIVISION ID, REQUESTING DEPT ID, and the ORDER NBR** on which the item was retrieved.

**Authorized User Reporting.** Each customer is able to setup a specified list of authorized users for their Iron Mountain account within our SafeKeeper PLUS system and/or Iron Mountain Connect portal (online system). Both sets of permissions allow users to effectively manage their records management program based on the requirements of their organization. For those individuals who are permitted to perform service transactions or account updates on a particular **CUSTOMER ID** in the SafeKeeper PLUS system, there are restrictions at the Division/Department level, strict parameters around archival destruction and the ability to create/maintain a password to interact with Iron Mountain. Iron Mountain Connect provides an opportunity to further enhance the abilities of each user which can be accomplished from any number of privileges within a company structure. For additional detail on the authorization for your account, contact our Customer Care team for support.
DESTRUCTION REPORTING
Other reports such as the Destruction Eligibility Report are also available to you by making a Special Request through Iron Mountain. Contact Customer Response or your Account Manager for assistance with standard industry guidelines and in deciding which destruction criteria is best for your organization.

The Destruction Eligibility Report. The Destruction Eligibility Report is an inventory report which lists cartons and/or files that have a DESTROY DATE within a specified DATE RANGE. This report can be sorted several different ways based on your criteria and is used primarily to identify those inventory items eligible to be destroyed. All or part of the report can be highlighted, signed by a Destruction Authorized User, and sent to Iron Mountain to initiate the destruction of inventory.

To facilitate your review, the full INVENTORY DESCRIPTION is displayed on the report.

If you are confident that all of the cartons and/or individually listed files that match your DESTROY DATE criteria should be destroyed, you can request that a destruction order be created using a span of DESTROY DATES.
The Preliminary Destruction Listing. Upon receipt of your destruction request, Iron Mountain creates an order for the destruction of the cartons or files and automatically sends you a Preliminary Destruction Listing, which reflects only those records that you previously identified as being eligible for destruction. Please review this Listing and for each item, sign in the designated area and on the instructions letter, and return the Listing to Iron Mountain at the address clearly shown on the cover letter which accompanies it so that the destruction order may be processed. Iron Mountain will never destroy your inventory without the signed Preliminary Destruction Listing and instructions letter from a Destruction Authorized User in your organization.

The Final Destruction Listing. After Iron Mountain receives your signed Preliminary Destruction Listing(s) and the destruction order is processed, a Final Destruction Listing is automatically generated and sent to you to verify that the destruction of your records, as you specified, has taken place. At that point, you will no longer pay storage for the destroyed inventory. Each record’s descriptive information and retrieval history, however, will remain on the SafeKeeper PLUS system for future reference.

For detailed information about destroying records, refer to the Permanently Removing Records from Storage section of this Guide.

SPECIAL REPORTING
Iron Mountain’s standard inventory, management, and destruction reports described previously are suitable for the vast majority of our Customers. However, we recognize that you may have unique requirements, and report customization is available. Contact Customer Response or your Account Manager for assistance in deciding which inventory and/or management reports are appropriate for your industry and business needs.
SHREDDING REPORTS
The Shredding service area is now available within the Report Center. The Shredding service area provides reports in the following areas.

Activity
- Scheduled Visit Report
- Shredding Trend Report

Financial
- Invoice to Download
- Invoice Transaction Report

Scheduled Visit Report. This report provides detailed Information about upcoming scheduled visits for shredding services. You may specify a customer, date range, and order type when requesting the report.

Shredding Trend Report. This report provides invoice trend data for shredding services over a period of time. There are several ways to view this report. For example:
- By Service (Scheduled vs. On Call)
- By Type (Charges vs. Units)
**Invoice Transaction Report.** This report provides a list of all shredding charges invoiced for a specified billing period. Shredding charges include those charges generated from onsite shredding orders, offsite shredding orders, and shredding supply orders serviced.

Users may specify a customer, date range, type of charge, and type of shredding service to be included in the output.

**Invoice Download Report.** The report provides information about charges that have been invoiced to a customer.

- Users may specify a customer, billing month, and the type of charges to output on the report.

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*All reports will be delivered to the Report Center within 3 hours of submission.*
Access to any of your information that is maintained by Iron Mountain is restricted to those who have been authorized, in writing, by your organization. In order to protect the security and confidentiality of your records management program, placing requests/orders and obtaining account information may only be placed by authorized individuals who are listed on the Authorized Users List.

AUTHORIZED ACCESS TO YOUR RECORDS

Your organization’s representative(s) may be authorized to access cartons and files for an entire CUSTOMER ID or, if you choose, only for a specific DIVISION ID and/or DEPARTMENT ID within that CUSTOMER ID. To authorize individuals in your organization to access your records and information, complete an Access Authorization Form and fax or mail it to Iron Mountain.

IRON MOUNTAIN CONNECT ALSO PROVIDES THE MANAGE USER ACCESS FUNCTION

Create a security structure that fits your specific business needs. Administrators govern a security model with up to three-tiers that create, edit, and manage users on an individual or group basis. Add and remove privileges or organizational access from one or multiple users easily.

establishing and Using Passwords

As an additional level of security, an individual PASSWORD can be established for each AUTHORIZED USER. This PASSWORD must be provided by the requestor prior to placing the order and is validated during the order entry process in the Iron Mountain systems. A “Password Given” message prints on the Packing Slip to confirm that the PASSWORD was provided. To establish the procedure of disallowing order processing unless the correct PASSWORD is provided by the AUTHORIZED USER, be sure to assign a PASSWORD for each AUTHORIZED USER on the Access Authorization Form, as described above.

For more information about establishing Authorized Users, please contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
Placing Requests and Orders

LOCATING YOUR INVENTORY

Placing orders with Iron Mountain Records Management is easy when you know your SafeKeeper PLUS (SKP) BARCODE NUMBER and FILE SEQUENCE NUMBER.

CARTON NUMBER LOOKUPS
The Inventory Report is used to research carton numbers for retrieval. The standard Inventory Report sorts left to right across the page by DIVISION ID, DEPARTMENT ID, RECORD CODE, FROM and TO DATE RANGES, MAJOR DESCRIPTION, MINOR DESCRIPTION and CUSTOMER BOX NUMBER.

Look up the DIVISION ID, DEPARTMENT ID and the RECORD CODE (if any) of the carton you are researching and use the rest of the inventory description to determine the carton number. At this point, you are ready to place retrieval orders through Iron Mountain Connect, etc. Both your CUSTOMER BOX NUMBER and the unique SKP BARCODE NUMBER are listed on the Report, and either may be used for order entry purposes. If you know that your account has repeating CUSTOMER BOX NUMBERS, please use the Report to look up the unique SKP BARCODE NUMBER before placing your order.

INDIVIDUAL FILE LOOKUPS
Use the File Inventory to research your individually listed files in storage at Iron Mountain. The FILE SEQUENCE NUMBER, FILE DESCRIPTION(S), CUSTOMER BOX NUMBER, and unique SKP BARCODE NUMBER for each individually listed file are displayed. To retrieve an individually listed file, provide all or part of the FILE DESCRIPTION during order entry. Or, to place your request in the most efficient way possible, use the combination of the SKP BARCODE NUMBER with the FILE SEQUENCE NUMBER.

For more information about locating your inventory, please contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
Placing Requests and Orders

INVENTORY MAINTENANCE REQUEST FORM

The Inventory Maintenance Request Form is used for changing information for inventory located in the SafeKeeper PLUS system. “Inventory Maintenance” is also known as either box or file maintenance, and includes the changing of information in the fields listed at the transmittal/box level such as: Customer Box Number, Division/Department Code, Record Code, From/To Dates, Major/Minor Description, Hold Codes, Destruction Date/Indicator, and others, except the Reference 2 and Receipt Date fields.

Requests to have Inventory Maintenance updates, changes or transfers can only be made by individuals authorized by your organization.

When your organization transfers boxes from one Account ID to another, you may want to establish new Department Codes and Record Codes, or inactivate unused Department Codes and Record Codes. Please use the “Special Instructions” box to communicate this information to Iron Mountain.

Requests may be faxed or emailed to Iron Mountain.

For more information about establishing Authorized Users, please contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
Placing Requests and Orders

ORDER PLACEMENT METHODS

Orders may be placed by using any one of four methods:

1. **Via the INTERNET** to access Iron Mountain Connect, Iron Mountain’s online records management portal, at [www.imconnect.com](http://www.imconnect.com). Contact Customer Response or your Account Manager for more information about this service.

2. **Via TELEPHONE** by simply calling Iron Mountain Customer Service. A fully trained representative will take your order and confirm all of the information about your request, immediately and courteously.

3. **Via FAX** by simply completing and transmitting the Iron Mountain Fax Order Form.

4. **Via EMAIL** for those Customers with email access to the Internet, by completing and transmitting the Iron Mountain Fax/Email form to Iron Mountain’s email address, order@ironmountain.com. Be sure to include all of the pertinent inventory and transportation information as you would for an online, phone, or fax order.

**PLEASE NOTE:** If you maintain multiple Customer IDs with Iron Mountain, you must use the Customer ID associated with the file or carton you are requesting to assure that it is located.

**ONLINE ORDERING: USING THE IRON MOUNTAIN CONNECT RECORD CENTER**

Iron Mountain Connect is powered by the SafeKeeper PLUS system, and it provides you with a real-time, Web-based means to access all of your records management information maintained at Iron Mountain. With its intuitive, user-friendly interface, you can perform many records management functions directly from your desktop. To request additional information, or to inquire about establishing access to Iron Mountain contact Customer Response or your Account Manager.

Iron Mountain Connect Offers an Easy Way to:

- Manage your organization’s records management policies, procedures, and retention schedule
- Conduct research on the current status and history of carton- or file-level inventory
- Place orders for pick ups, retrievals, refiles, supplies, and permanent withdrawals
- Check on the status of previously placed orders
- Input information about new cartons and files to be transmitted to Iron Mountain
- Maintain and modify descriptive information on any inventory
- Initiate online invoice inquiries
- Request and receive online reports that help you monitor your records management program
- Receive valuable records management program information and resources

**Getting Started**

Log onto the Internet. Double-click your browser icon. Enter the URL: [www.imconnect.com](http://www.imconnect.com). The Iron Mountain Connect login screen appears. Enter your Username and Password. From the home page, in the module labeled “Record Center,” click the “Enter the Record Center” link.

Iron Mountain Customer Response or your Account Manager will help you to initially define Login IDs and appropriate security levels for your organization, as well as establish your confidential access to the Iron Mountain Connect records management portal.
The Record Center SEARCH BAR and MAIN MENU appear. From the MAIN MENU, some or all of these tasks may be displayed depending on your individual security level. Click on the desired option.

- Search
- Orders
- Add Records
- Preferences
- Administration

**Entering Orders via The Record Center**

Select the type of order from the Order menu:

- New Order (for retrievals)
- Pick up Order
- Supply Order

The ORDER TYPE selected determines the information that the user is prompted for next.

**Checking Out**

From your Cart you can select the items you want to order from storage. You can also enter the delivery method and special instructions for each item.

On the Checkout page, do the following:

1. Make sure the delivery address is correct (if it is not, click Change Address and select an address from your Address Book)
2. In the Priority section, select a delivery date and time
3. Enter a carrier, instructions, confirmation email address, and other order options
4. Enter the Division and Department to be billed (if necessary)
5. Enter the P.O. Number — up to 17 characters (if required)
6. Enter the Chargeback Code — up to 20 characters (if necessary)
7. From a dropdown list, select whom the requested item is for, or enter the information manually

The SERVICE LEVEL, a required field, defaults to NEXT DAY; however, you can choose from Next Day, Half Day, Rush, or Scheduled (future date). The CARRIER defaults to Iron Mountain. Review the SPECIAL INSTRUCTIONS for this order (if any), and change if necessary. To place the order, click Proceed to checkout followed by Submit Request. A confirmation screen will appear, notifying the User that the order was placed. You can search for the Order Number by clicking Order Inquiry under the Orders Menu.

This is only a sample of what the Iron Mountain Connect Record Center can do for you. For more information, contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
**USING THE IRON MOUNTAIN FAX/EMAIL ORDER FORM – RECORDS MANAGEMENT ORDERS**

When you have multiple transactions such as retrieval, pick up and supply orders, the Fax/Email Order Form provides a convenient way for you to organize the information you need to efficiently place your order. Additionally, it acts as a hard-copy backup for your records. If you request multiple transactions regularly, contact Customer Response or your Account Manager for information about performing transactions through the Iron Mountain Connect records management portal.

A blank Fax/Email Order Form should be used as a master for making photocopies. Some helpful hints:

1. **Make photocopies of the blank form for each person in your organization who places orders.**

2. **Have each User complete the standard information used for orders, such as his/her NAME and PHONE NUMBER, your CUSTOMER ID and CUSTOMER NAME, DIVISION ID and/or DEPARTMENT ID, and the SHIPPING ADDRESS (if the same address is always used).**

3. **Photocopy the Form that contains all of the standard information. That way, each time you place an order you’ll only need to fill in the variable information such as carton number to be retrieved, number of refiles to be picked up, or quantity of empty cartons needed.**

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**Fax/Email Order Form – Records Management Orders**

Use this form to place orders via fax to USA: 1-860 934-5248, Canada: 1-800 387-6124, Maritime: 1-800 310-2464, or via email at: order@ironmountain.com.

Questions? Call Customer Response at 1.800.FASTFILE.

### Required Information:

- **Customer ID:**
- **Service Level:**
- **Please Circle:**
- **Next Day**
- **Half Day**
- **Rush**
- **After-Hours Rush**

### If Applicable:

- **Division ID:**
- **Authorized User:**
- **Department ID:**
- **Password:**

### Required Delivery/Pick-Up Address:

- **Company Name:**
- **Attention:**
- **Phone:**
- **Fax:**
- **Street:**
- **City:**
- **State/Prov:**
- **Zip/Postal Code:**

### Special Instructions:

**ORDER TYPE:**

- [ ] RETRIEVAL
- [ ] FAX & REFILE
- [ ] INTERNAL PROJECT
- [ ] PERMANENT WITHDRAWAL

### ORDER TYPE:

- [ ] PICKUP

### DESCRIPTION

- New Cartons
- Entire Carton Refiles
- Individual File Refiles
- Interfiles (New Files)

### QUANTITY

<table>
<thead>
<tr>
<th>CARTON TYPE (Size)</th>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ORDER TYPE:

- [ ] SUPPLIES

### QUANTITY

<table>
<thead>
<tr>
<th>ITEM</th>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Please fill out the form and fax or email it to order@ironmountain.com.**

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*WRAP001 rev 806 Standard*
Completing the Iron Mountain Records Management Fax/Email Order Form

Just complete the Fax/Email Order Form as shown below, and fax to Iron Mountain at the number listed at the top of the form. It’s that simple!

**a.** Print your **CUSTOMER ID**.

**b.** Choose the **SERVICE LEVEL** to tell us how fast you need to have your request performed.

**c.** Print your **DIVISION ID** (if used by your company) to specify ownership of individual records.

**d.** If used by your company, the **DEPARTMENT ID**, that is, the name or number of the department or cost center associated with this order for billing purposes.

**e.** If you have requested that only certain people have access to place orders for your company, enter the **AUTHORIZED USER**.

**f.** If you have requested that the user on the account be **PASSWORD** protected, enter the user’s password.

**g.** Print the delivery (pick up) address.

**h.** Include **SPECIAL INSTRUCTIONS** if there is anything unique about this particular order.

**i.** Choose an **ORDER TYPE**:

- **Retrieval/Internal Project/Permanent Withdrawal.** Access to materials already stored at Iron Mountain.
- **Fax and Refile.** Access to materials already stored at Iron Mountain that will be faxed to a person’s attention and then refile.
- **Pick up.** Pick up of new or previously referenced materials.
- **Supplies.** Delivery of additional forms or empty cartons.
**USING THE IRON MOUNTAIN FAX/EMAIL ORDER FORM - SHREDDING ORDERS**

When you have multiple transactions such as retrieval, pick up and supply orders, the Fax/Email Order Form provides a convenient way for you to organize the information you need to efficiently place your order. Additionally, it acts as a hard-copy backup for your records. If you request multiple transactions regularly, contact Customer Response or your Account Manager for information about performing transactions through the Iron Mountain Connect records management portal.

A blank Fax/Email Order Form should be used as a master for making photocopies. Some helpful hints:

1. Make photocopies of the blank form for each person in your organization who places orders.

2. Have each User complete the standard information used for orders, such as his/her NAME and PHONE NUMBER, your CUSTOMER ID and CUSTOMER NAME, DIVISION ID and/or DEPARTMENT ID, and the SHIPPING ADDRESS (if the same address is always used).

3. Photocopy the Form that contains all of the standard information. That way, each time you place an order you’ll only need to fill in the variable information such as carton number to be retrieved, number of refiles to be picked up, or quantity of empty cartons needed.

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**Fax/Email Order Form - Shredding Orders**

Use this form to place orders via fax to: USA: 1-800 934-5348, Canada: 1-800 387-0124, Maritime: 1-800 316-2464, or via email at: order@Ironmountain.com

Questions?: Call Customer Response at 1 800 FASTFILE

This form shall be used for requests to Iron Mountain for the following Shredding services only:
1) Empty Container/Console - bins are full and require additional service before the scheduled service date.
2) Requirement of an additional container/console
3) Removal of Container/Console – consoles/containers are not being used.

Please note: this form is not for Scheduled Services

Today’s Date: _____ / _____ / _____ (You will be notified of your service date)

**Required Information:** (Order cannot be processed without this information)

- **Customer ID:**
- **Requestors Name:** Phone: ______ / ______.

If Applicable:

- **Division ID:** Authorized User: ____________
- **Department ID:** Password: ____________

**Required: Service Location Address:** (Order cannot be processed without this information.)

- **Company Name:**
- **Contact Name:** Phone: ______ / ______.
- **Address:** Floor/Suite: ______
- **City:** ______
- **State:** ______
- **Zip:** ______

**ORDER TYPE:**

- **On-Site Shredding** (Shredding will take place at your location with a Mobile Shred Truck)
- **Off-Site Shredding** (Materials to be shredded are removed from the customer location & shredded at IM)

- **Empty containers:** Total number of containers
- **Add containers:** Total number of additional containers needed
- **Remove containers:** Total number of containers to be removed
- **Non-Archival Boxes:** Total number of boxes (Note: this order would be Off Site Shredding)

All other service requirements (shred other items, change service frequency, closing location, etc.): Please contact Customer Response for assistance: 1-800-FASTFILE
Completing the Iron Mountain Shredding Fax/Email Order Form

Complete the Shredding Fax/Email Order Form as shown below and fax it to Iron Mountain at the fax number listed at the top of the Form. It’s that simple!

Fax/Email Order Form - Shredding Orders

| a. | Prin “TODAY’S DATE.” You will be notified of your service date. |
| b. | Print your CUSTOMER ID. |
| c. | REQUESTOR’S NAME: The person within your company making the request. |
| d. | PHONE: Requestor’s phone number. |
| e. | Print your DIVISION ID (if used by your company) to specify ownership of individual records. |
| f. | If used by your company, the DEPARTMENT ID, that is, the name or number of the department or cost center associated with this order for billing purposes. |
| g. | If you have requested that only certain people have access to place orders for your company, enter the AUTHORIZED USER. |
| h. | If you have requested that the user on the account be PASSWORD protected, enter the user’s password. |
| i. | Print the SERVICE LOCATION for pick up/delivery. |
| j. | Choose an ORDER TYPE. |
REVIEWING YOUR OUTCARD/OUTCARD LABEL
The Iron Mountain Outcard assists in the maintenance of inventory history. It is used to locate needed inventory when you request it, and acts as a place marker for an individual file that is pulled from its carton or open file shelf location during a retrieval. The barcoded, self-adhesive label contains an abbreviated version of the Packing Slip information and is placed on the outside of the carton or file that has been retrieved, thereby facilitating delivery within your organization as well as proper refiling at Iron Mountain. For boxes, the barcode on the Outcard Label is scanned upon delivery to ensure the correct box is delivered.

Standard features of the hard-copy Outcard/Outcard Label include:

a. The ITEM TYPE will be either EB for a box or IF for an individual file.
b. The CUSTOMER ID, ORDER TYPE, ORDER NUMBER and LINE, and ROUTE ID.
c. The SKP ID (SafeKeeper PLUS Barcode Number) and CUSTOMER BOX NUMBER, if any.
d. The description of the file as it was entered during order entry.
e. LINE-LEVEL SPECIAL INSTRUCTIONS refer only to that particular item, providing information helpful in retrieving and/or refiling the item.
f. TRANSPORTATION DATE and TIME.
g. The FOR (Requested For) identifies the End User who is actually receiving the item.
h. CONTACT NAME indicates who placed the Order and/or whom the order is to be delivered to.
i. SERVICE LEVEL.
j. Barcode technology ensures that inventory and related paperwork are processed quickly and accurately.

For more information about how to read your Packing Slip and/or Outcard, please contact Customer Response (1-800-FASTFILE) or your Iron Mountain Account Manager.
Permanently Removing Records From Storage

PERMANENT WITHDRAWAL AND DESTRUCTION

In a properly maintained records management program, inventory is monitored to ensure the timely removal, when appropriate, of records from storage. Descriptive information and retrieval activity patterns for these records should be reviewed prior to making any removal decisions.

At Iron Mountain, there are two types of removal: Permanent Withdrawal and Destruction.

- **Permanent Withdrawal** is the Customer-initiated process of removing a carton or file from inventory with no intention of sending it back to storage. Once permanently withdrawn, the record is assigned a WTH (withdrawn) status and the Customer is no longer charged for storage on that record.

- **Destruction** is the process by which Customer-authorized records are permanently disposed of by Iron Mountain. Once destroyed, the record is assigned a DST (destroyed) status and the Customer is no longer charged for storage on that record.

PERMANENT WITHDRAWAL

A **Permanent Withdrawal** is a special type of retrieval order. By following the established authorization procedures for your organization, you can permanently withdraw records the same way you would request a typical retrieval: online through the Iron Mountain Connect records management portal, phone, fax, or email. If ordering online, simply select the “Permanent Withdrawal” order type. If ordering by fax, check the “Permanent Withdrawal” order type box; if ordering by email, indicate that “the following items are for “Permanent Withdrawal.” And, if ordering by phone, instruct the Iron Mountain Representative at the beginning of your order that you “would like to permanently withdraw the following items.” Doing so ensures that your permanent withdrawal request will be processed accurately and in the most efficient way possible.

**NOTE:** If you make frequent withdrawal orders, or would like to permanently withdraw a large percentage of your inventory, please contact Customer Response or your Account Manager.

Once permanently withdrawn, each record’s inventory history is updated to a WTH (withdrawn) status. Beginning with your next regular billing cycle, you will no longer pay for storage on that record. Upon delivery of your permanently withdrawn items, you will receive a Packing Slip which details each withdrawn item and its current disposition.

If you have previously retrieved records from storage but did not indicate at that time that they should have been permanently withdrawn, please provide Iron Mountain with written authorization (by an Authorized User from your organization) to have them permanently withdrawn from your inventory. Upon receipt of the authorization, Iron Mountain will create a permanent withdrawal order for the records, which discontinues further storage charges and updates each record’s disposition to “WTH.”
DESTRUCTION
Selecting the appropriate destruction method for your organization based on the types of records you store and their retention schedule requirements is an important decision to make in the records management lifecycle. Iron Mountain securely destroys material by shredding:

- **Secure Shredding.** Under this method, Iron Mountain destroys records by shredding, rendering those materials beyond reconstruction by reasonable procedures. At all times prior to physical destruction, records are in the secured custody of Iron Mountain. Upon completion, a certificate of destruction is provided, indicating that the material was destroyed by shredding.

Upon written authorization from a Destruction Authorized User in your organization, Iron Mountain will initiate the destruction process based on the method(s) you choose.

**Identifying Records for Destruction**
There are two ways for a Destruction Authorized User to advise Iron Mountain about the records that have met their retention period and should be destroyed: by highlighting a Destruction Eligibility Report or Inventory Report, and/or by using Specific Criteria.

**Requesting Destruction Using the Destruction Eligibility Report and/or Inventory Report.** Iron Mountain provides comprehensive Inventory Reports of the cartons and individually listed files that you have in storage. From these Reports, the DESTROY DATES of your inventory can be reviewed and identified for destruction.

1. Photocopy the Destruction Eligibility Report or Inventory Report and highlight the CUSTOMER BOX NUMBER and/or the SafeKeeper PLUS (SKP) BARCODE NUMBER of the record(s) to be destroyed.
2. Attach a letter, signed by a Destruction Authorized User from your organization, to the Destruction Eligibility Report or Inventory Report, which clearly states that the highlighted records are authorized for destruction by Iron Mountain.
3. Address this letter and the highlighted Report(s) to the Iron Mountain Data Entry department at your local Iron Mountain District. If you don’t know that address, contact Customer Response or your Iron Mountain Account Manager.

**Requesting Destruction Based on Specific Criteria.** You may wish to create a destruction order with Iron Mountain based on a specific set of criteria; for example, all cartons that have passed a particular DESTROY DATE.

The criteria from which you can select are: DESTROY DATE, RECEIPT DATE, FROM DATE, TO DATE, CUSTOMER BOX NUMBER, DIVISION ID, DEPARTMENT ID, RECORD CODE, DEPARTMENT ID/RECORD CODE combination.

The DIVISION ID, DEPARTMENT ID, and/or RECORD CODE can also be used in conjunction with other criteria to limit the destruction order to records that meet the criteria and are inventoried to that DIVISION ID, DEPARTMENT ID, and/or RECORD CODE.

To create a destruction order using criteria, send a letter, signed by a Destruction Authorized User from your organization, to your local Iron Mountain District. If you don’t know that address, contact Customer Response or your Account Manager. Be sure to note the criteria and ranges to be used to create the destruction order.
VERIFICATION OF RECORDS FOR DESTRUCTION
Verification of the records you have selected for destruction is a two-step process.

The Preliminary Destruction Listing
Upon receipt of your destruction request(s), Iron Mountain creates a destruction order from which a Preliminary Destruction Listing is generated and automatically sent to you along with an instructions letter. After carefully reviewing the Listing, sign in the designated areas on both the Preliminary Destruction Listing(s) and the instructions letter and return them to Iron Mountain Data Entry at the Iron Mountain address clearly shown on the instructions letter so that the destruction order(s) may be processed.

If the Preliminary Destruction Listing(s) needs to be changed, proceed as follows:

 ► For each item that should NOT be destroyed:
   1. With a single pen line, cross out the particular item and write ‘DND’ (do not destroy).
   2. Highlight the entire line as well.
   3. Note any applicable updates about the item such as a new DESTRUCTION REVIEW DATE or HOLD CODE.
   4. Sign both the Preliminary Destruction Listing(s) and the instructions letter and return them to Iron Mountain Data Entry at the Iron Mountain address clearly shown on the instructions letter.

 ► For each item that should be ADDED to the list for destruction:
   1. Write the CUSTOMER BOX NUMBER and the SKP BARCODE NUMBER on the last page of the Listing.
   2. Highlight these newly listed items.
   3. Indicate the destruction method as secure shredding.
   4. Sign both the Preliminary Destruction Listing(s) and the instructions letter and return them to Iron Mountain Data Entry at the Iron Mountain address clearly shown on the instructions letter.

 NOTE: Iron Mountain will not destroy your inventory without the signed PRELIMINARY DESTRUCTION LISTING(S) and instructions letter from a Destruction Authorized User in your organization.
The Final Destruction Listing
After Iron Mountain receives your signed Preliminary Destruction Listing(s) and instructions letter and the destruction order has been processed, a Final Destruction Listing is automatically generated and sent to you to confirm that the destruction of your records, as you specified, has been completed.

As a part of the destruction process, Iron Mountain maintains a record of the carton, changes the STATUS of the item to ‘DST’ [Destroyed by Iron Mountain], and creates a history record for the item which captures the DATE OF DESTRUCTION, the ORDER NUMBER, DIVISION ID, and DEPARTMENT ID of the division/department who requested the destruction (if applicable), as well as the CONTACT person for the destruction order.

Any item requested to be destroyed but that was previously Outcarded [OUT], Permanently Withdrawn [WTH], Destroyed by Iron Mountain [DST], or Destroyed by Your Organization [DSO] would be excluded from your destruction order request and, instead, be detailed on an accompanying Destruction Exception Report. Outcarded records will continue to incur storage charges. If a record will not be returning to storage at Iron Mountain or, if you have destroyed records at your own facility, please provide Iron Mountain with written authorization (from an Authorized User in your organization) to have them permanently withdrawn from your inventory. Upon receipt of the authorization, Iron Mountain will create a permanent withdrawal order for the records, which discontinues further storage charges and updates each record’s disposition to “WTH.”

If the status of an inventory item has changed between the time you originally requested that the item be destroyed and the time the destruction order was processed (after signing the Preliminary Destruction Listing and instructions letter), then a Status Change To Records On The Destruction Order Report is also included. This may occur if a record listed on the Preliminary Destruction Listing was subsequently retrieved from storage and delivered to you.

CERTIFICATE OF DESTRUCTION
A Certificate of Destruction statement will appear on your next Iron Mountain invoice. For more information about removing records from storage, please contact Customer Response or your Iron Mountain Account Manager.

For more information about removing records from storage or selecting the appropriate destruction method for your organization, please contact Customer Response (1-800-FASTFILE) or your Account Manager.
Please take a moment to complete the **Customer Quick Reference Card** with the information pertinent to your organization. The information contained in this document will be the information you will be asked for when you contact Iron Mountain.

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**Customer Quick Reference Card**

<table>
<thead>
<tr>
<th>Check Service Type:</th>
<th>☐ Records Management  ☐ Shredding</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Name:</strong></td>
<td><strong>Customer #/ID:</strong></td>
</tr>
<tr>
<td>Division ID, if applicable:</td>
<td>Department ID, if applicable:</td>
</tr>
</tbody>
</table>

**Records Management/Shredding - for Questions, Orders, Authorized User Updates:**

**USA Customers**
Iron Mountain Customer Response  
1000 Campus Drive  
Collegeville, PA 19426  
Call 1 800 FASTFILE  
Fax 1 800 934-5348

**Canadian Customers**
Iron Mountain Customer Response  
120 MacDonald Street  
Saint John, NB E2J 1M5  
Call 1 800 FASTFILE  
Fax Canada: 1-800 387-0124  
Maritimes Fax: 1-800 316-2464

**Local IM Mailing & Shipping Address**
Iron Mountain – Location:  
Street Address:  
City: , State/Prov.: Zip/Postal Code:

**Contacts**
General Manager:  
Customer Service Manager:  
Local Office Phone#:  
Local Office Fax#:

**Placing orders with Iron Mountain**
Your IM Department ID  
☐ is ☐ is not required when placing orders

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**General Reminders – All Customers**
- Always make a note of your Order Number for your future reference.
- Contact Customer Response as noted above for orders, address changes or authorized user changes.
- When faxing orders, make sure all information is complete, including Customer ID, Division/Department ID if applicable, Ship to Address, Contact Name, & Phone Number.
CARTONS

For additional information, please visit http://cic.ironmountain.com/records/.

NOTES
745 Atlantic Avenue
Boston, MA 02111
800 899 IRON

ironmountain.com

ABOUT IRON MOUNTAIN. Iron Mountain Incorporated (NYSE: IRM) provides information management services that help organizations lower the costs, risks and inefficiencies of managing their physical and digital data. Founded in 1951, Iron Mountain manages billions of information assets, including backup and archival data, electronic records, document imaging, business records, secure shredding, and more, for organizations around the world. Visit the company Web site at www.ironmountain.com for more information.

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