Itemized Service Instructions

New Box Submissions to BRM

Complete BRM's "Records Storage Form – New Box Submissions"
   A. Write your departmental contact information in the allotted space.
   B. **Required fields** are Barcode, Box size, Destruction date, and Description.
   C. The Sequence begin/end and From/To date fields are optional.
   D. Write the total number of cartons to be picked-up.
   E. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
   F. Choose a service level (based on the time you are submitting the form to BRM).
   G. Fax or email this form to BRM.
   H. BRM will create a work order and a driver will be scheduled to pick-up your items.
   I. Departments must sign a copy of that work order at the time the items are picked-up.

Note: If the required fields are not submitted on the form, your office will be contacted. BRM will **not** pick-up those items from your office until the required details are provided. Also, BRM will **only** pick-up items with pre-approved barcode labels. Thus, all new boxes scheduled to be picked-up must be listed on the Records Storage Form and submitted to BRM **in advance**.

Retrieving Boxes from BRM

Complete BRM's "Box Retrieval and Box Return Request" form
   A. Provide your departmental contact information in the allotted space.
   B. Write the barcode numbers for those items to be retrieved from BRM and returned to your office in the table marked "Boxes Requested for RETRIEVAL from BRM."
   C. Specify the total number of items you are requesting to be delivered to your office.
   D. Provide the total quantity of boxes to be serviced for your office on that page.
   E. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
   F. Choose a service level (based on the time you are submitting the form to BRM).
   G. Fax or email this form to BRM.
   H. BRM will create a work order with only those barcode numbers listed and a driver will be scheduled to deliver those items to your office.
   I. Departments must sign a copy of that work order at the time the items are delivered.

Note: BRM will **only** deliver items for which the barcode numbers have been provided **in advance**, via the "Box Retrieval and Box Return Request" form. Any item that is not listed on the form will **not** be delivered to your office by BRM.

Returning Boxes to BRM

Complete BRM's "Box Retrieval and Box Return Request" form.
  A. Provide your departmental contact information in the allotted space.
  B. Write the barcode numbers for those items to be returned from your office to BRM in the table marked "Boxes Requested for Pick-up from your office."
  C. Specify the total number of items you are requesting to be returned to BRM.
  D. Provide the total quantity of boxes to be serviced for your office on that page.
  E. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
  F. Choose a service level (based on the time you are submitting the form to BRM).
  G. Fax or email this form to BRM.
  H. BRM will create a work order with only those barcode numbers listed and a driver will be scheduled to pick-up those items from your office.
  I. Departments must sign a copy of that work order at the time the items are picked-up.

Note: BRM will **only** pick-up items for which the barcode numbers have been provided **in advance**, via the "Box Retrieval and Box Return Request" form. Any item that is not listed on the form will **not** be picked-up from your office by BRM.

Retrieving Files and/or Documents

Complete BRM's "Retrieving and Returning Files & Documents" form for ordering unbarcoded files and/or documents from boxes. This applies to items within boxes that do <u>not</u> have barcode labels on them for which you need to retrieve from a container at BRM. You may also use this form to order barcoded filefolders within boxes (if some of your boxes have barcoded filefolders within them and you know the filefolder barcode number).

  A. Write your departmental contact information in the allotted space.
  B. If the item you are requesting does <u>not</u> have a barcode number associated with it (i.e., a document within the box OR an unbarcoded filefolder): Write the barcode number of the box from which you wish to retrieve the filefolder or document in the "Barcode" field. Then, provide as much detail about the item you wish to have BRM attempt to locate within the container in the "Description" field.
  C. If the document or filefolder within a box already has a barcode, simply provide that information in lieu of the box barcode number. You do not need to complete the "Description" field.
  D. Provide the total quantity of items to be retrieved for your office on that page.
  E. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
  F. Choose a service level (based on the time you are submitting form to BRM).
  G. Fax or email this form to BRM.
  H. BRM will create a work order with only the items listed on this form and a driver will be scheduled to deliver those items to your office.
  I. Departments must sign a copy of that work order at the time items are delivered.

Returning Files and/or Documents

Complete BRM's "Retrieving and Returning Files & Documents" form for returning individual items you have retrieved from boxes are BRM.

  A. Write your departmental contact information in the allotted space.
  B. Provide the barcode number(s) of the items you wish to return to BRM for storage in the "Barcode" field. Please note that all previously unbarcoded files and documents will be barcoded at the time BRM delivers them to your office. Therefore, a barcode number will now be associated with each respective file and document that has been retrieved.
  C. Provide the total quantity of items to be returned from your office on that page.
  D. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
  E. Choose a service level (based on the time you are submitting form to BRM).
  F. Fax or email this form to BRM.
  G. BRM will create a work order with only the items listed on this form and a driver will be scheduled to pick-up those items from your office.
  H. Departments must sign a copy of that work order at the time items are picked-up.

Note: BRM will **only** pick-up items for which the barcode numbers have been provided **in advance**, via the "Retrieving and Returning Files & Documents" form. Any item that is not listed on the form will **<u>not</u>** be picked-up from your office by BRM.

Submitting Revised Transmittal Data to BRM

Complete BRM's "Records Storage Form – Revised Transmittal Sheet" for submitting revised or additional data to BRM for items ***already*** in storage at their facility.

    A. Write your departmental contact information in the allotted space.
    B. Choose if you are requesting to "Add" or "Replace" the data already on file for your respective storage items. Please choose "add" if you wish to submit *new* data about your items to BRM. Users should select "replace" if you desire for BRM to erase what is currently on file for the respective item and replace it with the newly submitted data.
    C. Complete the Barcode/Box# field (Required).
    D. If a destruction date is not already on file for the item, you must complete the "Destruction Date" field. If this information was previously submitted to BRM, you do not need to complete this field.
    E. Complete any additional applicable fields on the form for which you wish to have data modified.
    F. Provide the total quantity of cartons to be serviced for your office on that page.
    G. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
    H. Fax or email this form to BRM.

Supply Orders

Complete BRM's "Supply Order" form for purchasing boxes and ordering additional barcode labels for your office.
    A. Write your departmental contact information in the allotted space.
    B. Provide the total quantity of items (labels and/or boxes) you are ordering in the respective "Quantity" line.
    C. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
    D. Fax or email this form to BRM.
    E. BRM will create a work order with the items you ordered listed and a driver will be scheduled to deliver them to your office.
    F. Departments must sign a copy of that work order at the time the items are delivered.

Note: Box orders have a minimum purchase of 10 boxes per order and can be ordered in increments of five thereafter (i.e. 10, 15, 25, 40, etc.). A pack is considered 25 boxes. Also, please be advised that barcode labels are pre-assigned to your particular BRM account number and should **not** be shared with other University departments.

Barcode labels are typically delivered to departments via US MAIL. Should you require labels sooner, please specify this on your order form.

Records Destruction

Complete BRM's "Records Destruction Order" form for ordering unbarcoded destruction or new destruction bins/consoles for your office, as well as requesting that existing bins/consoles be emptied or removed.

A. Write your departmental contact information in the allotted space.
B. If ordering unbarcoded destruction, provide the total quantity of boxes to be picked-up from your office. Also, provide a general description of the size (i.e., if oversized, please state this under the size field).
C. Provide the total cartons for unbarcoded destruction on the page.
D. Choose a service level for unbarcoded destruction orders only (based on the time you are submitting the form to BRM).
E. If placing an initial request for bins/consoles (first-time set-ups), provide the total quantity of applicable bins/consoles for your office and check the "Initial Request" column.
F. If your bin/console is full, provide the total quantity of applicable bins/consoles for your office and check the "Swap/Empty" column. BRM typically services bins/consoles on Wednesdays. If you require the bin/console on a specific day, please call BRM's Customer Service Department at 412-321-0505.
G. Confirm if this is/is not a final pick-up by writing "Yes" or "No" in the "Final Pick-Up" column. A final pick-up should be requested if you no longer need the bin/console and wish for BRM to permanently remove it from your office.
H. Sign the bottom of the form and, if applicable, provide your passcode. The passcode field is the four-digit code you chose to be associated with your name for your account's authorized user list. If you do not have a passcode, you may leave this field blank.
I. Fax or email this form to BRM.
J. BRM will create a work order with the service details specified on the "Records Destruction Order" form.
K. Departments must sign a copy of that work order at the time destruction requests are serviced at your office.

Note: Departments with a bin or console should **only** request service when the container is near capacity. All accounts are considered "will call" and you will need to submit this form to have BRM service your account.

Additionally, for all unbarcoded destruction orders, you must have BRM's orange destruction labels applied to all boxes intended for this service. Please use the "Supply Order" form if you are in need of destruction labels.