



Off-Site Records Storage and Services

University of Pittsburgh User Guide

ACCOUNT # _____

Account #'s - PPH064200 (Storage)
PP00642RC (Destruction)

University Records Management (412) 648-3148
University Records Management Fax (412) 648-2170
recordsmanagement@pitt.edu

Access Customer Service (412) 321-0505
Access Customer Service Fax (412) 321-0305

pittsburgh@accesscorp.com

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This manual has been prepared to provide clients with a comprehensive yet easy to use guide for the many services of ACCESS. If you have any questions or need additional information, please contact ACCESS Client Care at (412) 321-0505.

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Our Vision

To exceed the expectations of our clients, company and community every day.

Our Mission

Advancing how the world manages information with the very best service.

Our Purpose

We protect and manage information for millions of people.

www.Informationprotected.com

University of Pittsburgh University Records Management

History

The University Records Management Program (URM) originated in the Business Services Office in 1977. In 1999, the University assigned the URM to the Archives Service Center and entered into a contract with Business Records Management, Inc. (BRM), a regional records management company, to store inactive records at several remote facilities around the Pittsburgh metropolitan area. Recall Holdings Ltd. acquired Business Records Management, Inc. in December 2014.

Recall Ltd. was itself purchased by Iron Mountain, Inc. in spring of 2016. However, a ruling by the U.S. Department of Justice restricted Iron Mountain's acquisition of Recall operations in 13 U.S. cities, including Pittsburgh. As a result, a privately-held third-party records and information management service company named Access acquired Recall's Pittsburgh-based storage operation.

Between May and July 2016, University of Pittsburgh contracted destruction services were owned by Iron Mountain. In July 2016, all records management services were consolidated with Access.

Mission

The primary purpose of the University Records Management program is to provide for the efficient and systematic control of the creation, receipt, maintenance, use, and disposition of records. Records administration covers the management of records, regardless of age, to meet the administrative, financial, legal and historical needs within the University of Pittsburgh's offices and departments.

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In fulfilling its mission, the program:

- Develops, maintains, and distributes policies, guidelines, and training to outline procedures for offices and departments to comply with internal practices, as well as state and federal laws relating to their responsibilities for records retention and preservation.
- Works closely with University departments to ensure the proper management of records by establishing schedules of commonly held records in order to facilitate their retention, disposal or transfer to the archives.
- Sustains and monitors the relationship with the University's official repository of inactive records, Access Information Protected LLC (ACCESS).

Please visit the University Records Management website for information on:

- University Records Management mission
- Access service procedures
- Regulations and Retention Schedules
- Transfer of Records to the University Archives
- URM Newsletters

**University records management off-site storage with Access
should only be used for university records.**

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Records Storage, Delivery, and Management Services

Your records are safe, secure, and easily accessed with Access Information Protected (ACCESS), the largest document management company headquartered in Pittsburgh.

Storage Facilities

ACCESS's 13 off-site storage facilities are custom designed for state-of-the-art records storage and management. All of our buildings have monitored security systems with controlled access, video surveillance, are equipped with fire protection or detection systems, and are located outside of all flood plains.

The ACCESS Record Center is not a climate-controlled environment. Magnetic media, audio/video tapes, and microfilm/microfiche should be stored in our vault or climate-controlled storage areas to prevent damage. Contact the University of Pittsburgh University Records Management office for more information.

Service Capabilities

ACCESS's facilities are strategically located just minutes away from downtown Pittsburgh, so that records can be delivered quickly when the need arises. ACCESS routinely provides twice-a-day delivery service including same day delivery. ACCESS's friendly and knowledgeable service staff will do everything possible to be responsive and provide fast and trouble-free access to records stored with us.

Barcode Tracking

All items incoming or outgoing are barcoded. During the pickup/delivery, ACCESS's driver scans the barcode of each item (box, file, tape, individual document) at the client location and provides a copy of the signed workorder. Scanning the barcode also creates an electronic transaction log in ACCESS's database indicating the time, date, activity, and employee who performed the transaction. Whether you need an entire box, a file, or just a single item, our system enables us to quickly locate and retrieve your records and monitor their transit.

ACCESS's Total Information Management Includes:

- Three primary locations: Northside, Shadyside and Greentree
- Climate controlled facilities available
- 24-hour security /video surveillance.
- 24-hour, 365-day emergency delivery service.
- Same day delivery.
- Barcoded file tracking.
- File-level indexing for pulling by name, number, description, date, and/or a customized field.
- Confidential destruction.
- On-Site staffing services.
- Backup computer media storage with scheduled pickups and deliveries.
- Conference rooms for viewing information.

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File Management

ACCESS is the only company in Western Pennsylvania that offers “true” file-level tracking. ACCESS will individually barcode and index each file, thereby keeping a complete inventory/activity history on each file. This file tracking service makes management of your inventory simple and cost efficient.

On-Site Tracking Software

ACCESS offers a sophisticated barcode file tracking software package that allows you to manage your inventory on-site, as well as off-site direct from your own computer.

FileBRIDGE

Interface with ACCESS through FileBRIDGE, Access’s online account management platform. You will have secure access to your file inventory on ACCESS’s database, and are able to request a number of account services such as box retrieval. Contact [University Records Management](#) for more information.

Reporting

Our reporting services enable you to quantify the activity history of your files, identify records that are eligible for disposal and allocate your records storage and management costs by client, matter, department, cost center, or a customized field. If you are not a **FileBRIDGE** user, please contact the University Records Management office for your department’s inventory report.

Destruction Services

ACCESS offers complete, confidential records and computer media disposal services on a regularly scheduled basis or as needed by which all records are either shredded or pulverized. *Certificate of Destructions* are created for barcoded records that are destroyed and are maintained in the URM office, provided to users upon request.

Destruction Bin Rotation Services

ACCESS offers a cost-effective destruction bin rotation service providing secure collection and destruction of confidential business information. Our high-level security includes lockable receptacles, secure vehicles, professional employees, and a bonded staff.

For information about additional services, please contact [University Records Management](#)

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Access provides the following size records cartons and media transport cases

- ***Standard Letter & Legal Box – 1.2 Cubic Feet (13”W x 10 3/8” H x 16 ½”D)***



Standard Access boxes will now come in two parts (box and lid)

- Tall Letter & Legal Box – 1.8 Cubic Feet (13 ¼" W x 12 3/4" H x 16 5/8"D)
- Large Letter Box – 2.4 Cubic Feet (13 ¼" W x 10 ½" H x 25 ½" D)
- Large Legal Box – 3.0 Cubic Feet (16 ¼" W x 10 5/8" H x 25 ½" D)
- X-ray Box – 1.8 Cubic Feet (7 ¼" W x 20 ½" H x 16 D)
- Check Box – 1.0 Cubic Feet (10" W x 4 ½" H x 25" ¼" D)
- Flat Drawing Box – 1.8 Cubic Feet (27 ¾" W x 37 ½" H x 2" ½" D)
- Drawing Tube – 0.6 Cubic Foot (3" ¼" D x 37" 1/8" L)
- Drawing Box – 1.0 Cubic Foot (6 ¼" W x 6 ¼" H x 38 ¾" D)

Magnetic Media Transport Cases

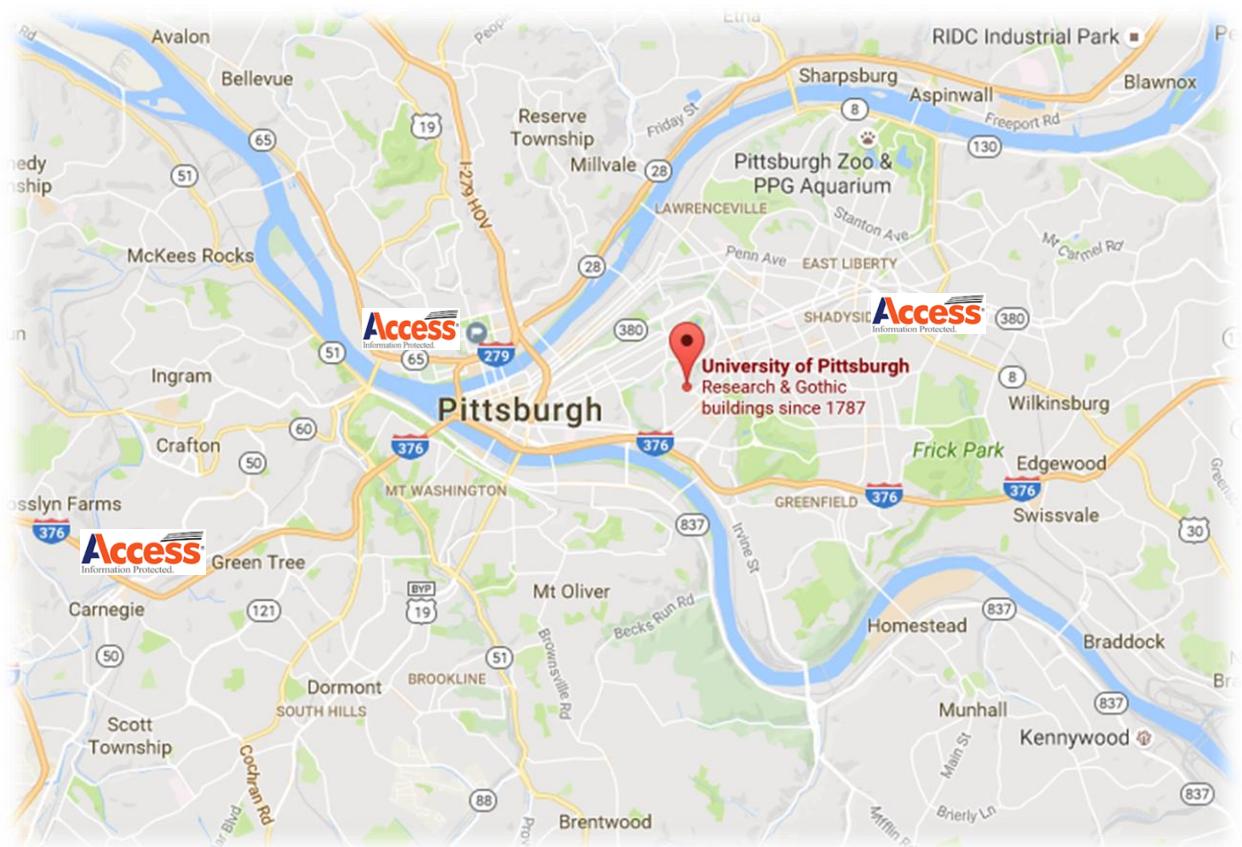
- LTO20 – Holds: LTO Tapes – Capacity: 20
- MID-Multi – Holds: Multiple Media – Capacity: 15
- ULTI-Multi – Holds: Multiple Media – Capacity: 25 Mixed DLT\LTO
- LTO5 – Holds: Data Cartridges – Capacity: 5

**For supply order pricing and questions please call
(412) 321-0505**

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ACCESS's Pittsburgh Locations



*Greentree, Western Avenue (Northside), and Penn Avenue at Fifth



Access has acquired BRM's Underground Archive facility located north of Pittsburgh in Wampum, PA. which provide a unique combination of outstanding physical characteristics including:

- Strict temperature and humidity controls to accommodate long-term preservation.
- Controlled access for asset security and regulatory compliance demands.
- Superior protection from natural or man-made disasters via 30-foot thick solid limestone walls.
- Adaptive physical configurations enabling us to offer solutions designed for your organization.

Please visit www.uarchives.com for more information

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Customer Service Hours

Service Hours for Deliveries and/or Pickups:

Regular Deliveries (Oakland Campus)

- Orders placed before 10:00 a.m. will be serviced that day by 5:00 p.m.
- Orders placed from 10:00 a.m. to 3:00 p.m. will be serviced the next day by noon.
- Orders placed after 3:00 p.m. will be serviced the next day by 5:00 p.m.

Regular Deliveries (Non-Oakland Campus)

- Orders placed by 11:00 a.m. will be serviced the next day by noon.
- Orders placed after 11:00 a.m. will be serviced the next day by 5:00 p.m.

Please be aware that special delivery options are considerably more expensive, and therefore, should only be used when regular delivery does not satisfy your needs.

Priority Deliveries:

This service is for orders for a delivery within approximately three hours of it being placed (orders must be placed no later than 1:00 p.m.).

Rush Deliveries:

This service is for orders for a delivery within approximately two hours of it being placed.

Rush Deliveries After 4:00 or Weekends:

This service enables you to have a delivery after normal business hours and on weekends/holidays.

***ACCESS is unable to accept a fax or e-mail request for this service without verbal confirmation.**

Off-hours (ASAP):

Delivery services are available at any time after normal business hours, weekends and holidays. Please call ACCESS's answering service at **(412) 224-1081** for off-hours delivery service.

***ACCESS is unable to accept a fax or e-mail request for this service without verbal confirmation.**

Please provide notice for a pick up or delivery of forty (40) or more items. Orders of 40 or more items will be placed on a schedule & a service date will be provided to the client's location.

Third-Party Shipping:

If items are being sent to storage via a third-party shipping company, please contact ACCESS's Account Management Department for detailed instruction.

To Directly Access Customer Service:

Telephone: (412) 321-0505

Fax: (412) 321-0305

E-mail: pittsburgh@accesscorp.com

Off-Hours Delivery Services: (412) 224-1081

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General Information

Access observes the same annual holiday schedule as the University of Pittsburgh.

Normal Office Hours: 7:00 a.m. to 5:30 p.m., Monday through Friday. Saturday by appointment only.

Our phones are answered and all calls are responded to 24 hours a day, seven days a week (including holidays).

Please call (412) 224-1081 after normal business hours (after 5:30 p.m., weekends and holidays).

Snow Policy: In case of heavy snow or icy conditions, it is possible that ACCESS will open late and normal delivery times will be adjusted. It is your responsibility to inform ACCESS if your office is closed or will open late. In order to avoid attempted delivery charges you will need to call ACCESS to reschedule a delivery, pickup and/or computer media rotation. If ACCESS is not notified, the University will be charged for the attempted delivery, pickup and/or computer media rotation.

Contacts

University of Pittsburgh
University Records Management

412-648-3148 Phone
412-648-2170 Fax
recordsmanagement@pitt.edu

Account Manager
Andrew J. Wyzkoski

412-321-0600 Phone
412-330-2363 Fax
awyzkoski@accesscorp.com

Access Client Care
Meghan O'Rourke
(Destruction Service Requests \ Scheduled Rotation Inquiries\Setup)

412-321-0505 Ext
412-321-0305 Fax
morourke@accesscorp.com

Vault Services and Tape Rotations
Rich Fischer

412-321-0600 Phone
412-321-0305 Fax
rfischer@accesscorp.com

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Glossary of Record Storage Terms

- Access:** File/Document/Box is retrieved from client inventory and reviewed at record center by client, or returned to client's department for review.
- Box Barcode:** A unique UPC code that is assigned to a specific box within your account. The box barcode can be white, white barcode with a yellow barcode indicating file level indexing, green or pink depending on the type of indexing (file, box) and the storage requirements (warehouse, vault, climate controlled) based on your individual account.
- Box-Level Indexing:** General box information is obtained on an entire box and entered into a custom database.
- Box Refile:** Box is returned to record center and placed into a barcoded location.
- Container:** **Synonymous with box. Must have lid and handles. Can be records center box, however not a moving or copy paper box.**
- Delivery:** File/Document/Box is sent to client via ACCESS courier.
- Destruction:** File/Document/Box is retrieved from client inventory with prior authorization from client, shredded and recycled.
- Documents:** Individual sheets of paper that are to be placed into their original file.
- File Barcodes:** White UPC codes that are assigned to an individual file for specific tracking purposes.
- FileBRIDGE:** **Access's online file management platform through which users can request boxes, submit supply orders, and generate box inventories.**
- File-Level Indexing:** Detailed file information is obtained from each (barcoded) file and entered into a custom database. ACCESS offers two unique ways in which to utilize this service:
1. Client labels each file and completes the file transmittal sheet.
2. Client labels the box and ACCESS's data entry department stickers each file and will add the data directly into your custom database.
- File Refile:** File is returned to record center and placed into its original box. To ensure that the file is returned to the appropriate box, never remove the file archive from the file.
- Itemized Services:** Form-driven service by which all requests must be made in writing and submitted to ACCESS for processing. The fields that the University designates as mandatory must be completed before ACCESS will process the request.

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<u>Permout:</u>	File/Document/Box is permanently removed from ACCESS. Contact University Records Management if boxes should be permanently removed.
<u>Pick up:</u>	File/Document/Box is returned to ACCESS via an ACCESS courier.
<u>Rpack:</u>	Contents of one box is placed into a new box. This service occurs when the customer uses any other box (other than a standard records storage box with a lid) or when boxes are over-packed or damaged.
<u>Retrieval (or Pull):</u>	File/Document/Box is retrieved from client inventory, at record center, upon request from client.
<u>Search:</u>	A database search when a barcode is not provided.
<u>Transmittal Sheet:</u>	Important information regarding the contents of the File/Document/Box is recorded on this sheet. Information is transferred from sheet to ACCESS database.
<u>Unbarcoded Destruction:</u>	Box of discarded paper is retrieved directly from the client, shredded and recycled. Orange destruction labels must be affixed to any unbarcoded destruction boxes.

Scheduled Rotation - Destruction:

Destruction Services are provided to all University locations. Service requests must be submitted using a destruction order form and including department number, full address (including floor & suite number), and requested service (Bin\ Console Swap, Final Pick Up or initial of bins\consoles). All locations must be placed on a rotation schedule, for instance, every two weeks, once a month, three months, etc...

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Account Authorization



In order to protect the security and confidentiality of your departmental records, the University of Pittsburgh and ACCESS require that an authorization form be completed and updated as individuals enter or exit your department (see following page). It is recommended your department have at minimum two authorized users.

The required fields on this form include department name, contact person, address details, phone, fax and email. You must use the table on the form to add or delete any users to/from your account. Please type the person's name in the table. If the user desires a passcode, an **optional** security feature, it may be any four-digit alpha or numeric code of their choosing. If a passcode is not wanted, please leave the field blank.

BE AWARE

- **Only Authorized Users may make requests.**
- **ACCESS's Client Care will not process orders for requestors who are Authorized Users.**
- **The form must be signed by your primary departmental representative.**
- **It is the responsibility of your departmental representative to inform University Records Management, in writing, as to who is authorized to access your records.**

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Access
923 Bidwell Street
Pittsburgh, PA 15233
412-321-0600 Telephone
412-330-2363 FAX
Attn: Kelly Smogor

Access Authorization Form

Company Name: University of Pittsburgh

Account No:

Contact Person:

Department:

Complete Mailing Address:

Telephone:

Fax:

Email:

Deliveries will be released to any company employee, unless otherwise specified at the time of order.

Any additions, deletions, or security code changes must be made and submitted to Access in writing by the department representative. All changes require a 48-hour verification prior to use.

AUTHORIZED PERSONNEL FOR ACCESS TO RECORDS REGARDLESS OF FORMAT

Name (Please Print)	<i>4 Digit Passcode *</i>	(Please Mark)		
		Add	Remove	Change

*** Access is not responsible for verification of requestor if a passcode is not listed above.**

I, _____, representative for my department, authorize the individuals listed above to have access to department's records regardless of format.

Company Representative Signature

Date

Representative Title

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Ordering Supplies

Procedure for Ordering Supplies from ACCESS

Complete ACCESS's "Supply Order Form" for purchasing boxes and ordering additional barcode labels for your office.

1. Write your departmental contact information in the allotted space.
2. Provide the total quantity of items (labels and/or boxes) you are ordering in the respective "Quantity" line.
3. 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.
4. E-mail this form to ACCESS at pittsburgh@accesscorp.com
5. ACCESS will create a workorder with the items you ordered listed and a driver will be scheduled to deliver them to your office.
6. Departments must sign a copy of that workorder 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 5 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 ACCESS 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.

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SUPPLY ORDER FORM

DEPARTMENT INFORMATION

Request Date: _____ Requestor Name: _____ Account/Department #: PPH064200/_____

Phone Number: _____ Fax Number: _____

Street Address: _____ City: _____ State: _____ Zip _____

Code: _____

LABELS*

Type	Size	Quantity
White barcode labels	Number of labels determined by user	
Green or Yellow barcode labels (specify color)	Number of labels determined by user	
Destruction labels (orange stickers)	Number of labels determined by user	
File folder barcode labels (for file-level departments only)	Number of labels determined by user	

* The standard barcode labels are white (for paper storage). If you require green (environmental) or yellow (file labels), please be certain to specify that on the designated line above.

BOXES - minimum box purchase is 10 (increments of 5 thereafter). Please note that prices listed are current for the FY2016 only.

Type	Size	Quantity
1.2 cubic foot white box \$1.92 each	13"W x 10 3/4"H x 16 1/2" D	
1.8 cubic foot legal box \$1.71 each	13 1/4"W x 12 3/4"H x 16 5/8"D	
3.0 cubic foot large legal box \$2.59 each	16 1/4"W x 10 5/8"H x 25 1/2"D	
2.4 cubic foot large letter box \$2.18 each	13 1/4"W x 10 1/2"H x 25 1/2"D	
1.2 cubic foot check carton \$1.82 each	10"W x 4 1/2"H x 25 1/4"D	
1.2 cubic foot drawing tube \$2.18 each	3 1/4"D x 37 1/8"L	
1.8 cubic foot X-ray carton \$1.82 each	7 1/4"D x 20 1/2"H x 16"D	
1.8 cubic foot flat drawing carton \$5.14 each	27 3/4"W x 37 1/2"H x 2 1/2"D	
1.2 cubic foot microfiche carton \$2.23 each	8 3/4"W x 5 3/8"H x 16 1/8"D	

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Submitting records for off-site storage

Required Fields

In order for your department to manage your records over the course of their retention period, and for the University Records Management program to provide appropriate oversight, the following information is required when transferring any University of Pittsburgh records to off-site storage at Access facilities.

Description:

Free text field used to succinctly describe the contents of containers/filefolders. The information contained in the description field can be used for searches. However, due to the fact that this is a free text field, searches are much more time-consuming. Therefore, it is always better to utilize the additional fields that are available when appropriate.

Review/Destruction Date:

All new boxes sent to ACCESS for storage are required to have a review/destroy date based on the University's retention schedules and appropriate departmental documentation. If you are unsure of what date to apply to your records, or believe that your records should be permanently maintained in storage, please contact the University Records Management office at (412) 648-3164.

General Records Retention Schedule:

http://www.library.pitt.edu/other/files/pdf/asc/Pitt_General_Retention_Schedule.pdf

Financial Records Retention Schedule:

<http://www.bc.pitt.edu/frs/FinancialRecordRetentionSchedule.html>

Optional Fields

The following fields will allow you to provide more descriptive information to your records:

Sequence Range:

Helps to identify the Container/Filefolder descriptions. For example, if multiple boxes contain the description "Personnel files," the sequence range may be "Abercrombie to Crawford." This field can be alpha or numeric.

From/To Date Range:

The date range serves two purposes. The first purpose is to further define the contents of the container. In the example above, the "personnel files" could also have termination dates associated with them. The date range would be utilized in this case. The second purpose is to create a retention date.

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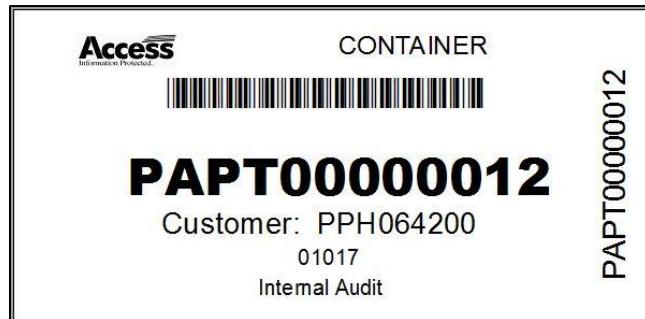
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Preparing Box Level BOXES to go to ACCESS Record Center

Step 1:

Place a **White** box barcode label on the upper right corner of the front (**handle side**) of the box. Place the barcode low enough so that the lid does not cover the label. Make sure the barcode is **NOT** placed on the lid of the box.

NOTE: *Barcodes must be affixed to all boxes before they are sent to ACCESS.*



Step 2:

Complete ACCESS's "Records Storage Form – New Box Submissions."

1. Write your departmental contact information in the allotted space.
2. **Required fields** are barcode, box size, destruction date, and description (65-character limit for faxed forms and 250-character limit for emailed forms).
3. The sequence begin/end and from/to date fields are optional.
4. Write the total number of cartons to be picked up.
5. 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.
6. E-mail this form to ACCESS at pittsburgh@accesscorp.com
7. ACCESS will create a workorder and a driver will be scheduled to pick up your items.
8. Departments **must sign a copy** of that workorder at the time the items are picked up.

Note: If the required fields are not submitted on the form, your office will be contacted. ACCESS will not pick up those items from your office until the required details are provided. Also, ACCESS 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 ACCESS in advance.

Step 3:

All materials must be ready for ACCESS's drivers when they arrive for pick up. You will be asked to sign a workorder that describes and quantifies your pick up request. You will be given a copy of the workorder for your records.

REMEMBER

Do not tape or place transmittal sheets on or in your boxes.
Do not write anything on the outside of boxes sent to off-site storage

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University of Pittsburgh – New Box Submission Form

DEPARTMENT INFORMATION

Request Date: _____ Requestor Name: _____ Account/Department #: PPH064200 \ _____

Phone Number: _____ Fax Number: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

Ctn #	Barcode # (required)	Box Size (required)	Destruction Date (required)	Sequence Begin	Sequence End	From Date (MM/DD/YYYY)	TO Date (MM/DD/YYYY)	Description of Content (required) 65 character limit for paper transmittal 250 character limit for electronic transmittal
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

Total Cartons this page _____

Comments _____

Signature _____ Passcode (if applicable) _____ Page _____ of _____

Email this form to pittsburgh@accesscorp.com; FAX this form to Access at 412-321-0305. Please be certain to retain a copy of this form for your records.

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Checklist for Box-Level Containers Being Sent to ACCESS Record Center

- White** box barcode label on every box.
- Information for each box completed on the *New Box Submission Form*.
- Email the *New Box Submission Form* to ACCESS and retain a copy for your records.
- Exact count and size of boxes.
- Form is not inside of the box, nor descriptive information written on outside.
- Only **NEW** files were placed in the **NEW** boxes.
*Warning: Do not place **NEW** files in boxes that have previously been at ACCESS without updating the inventory.

CONSIDER

Primary ACCESS Record storage is not a climate-controlled environment.

Magnetic media, audio/video tapes, and microfilm/microfiche should be stored in a climate-controlled environment and, therefore, should be stored in our vault or climate-controlled storage areas to prevent damage. Please consider storing your vital records, permanent records, important records, and long-term records in either ACCESS's vault or climate-controlled storage areas for added protection.

Please contact the University of Pittsburgh University Records Management office for more information.

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Preparing BOXES to go to ACCESS Record Center Environmental/Climate Controlled Area

*Please use a **GREEN** box barcode on boxes that will be placed into the **CLIMATE-CONTROLLED AREA**. This signals to ACCESS personnel that this box requires a temperature and humidity controlled atmosphere.*

Step 1:

Place a **Green** box barcode label on the **upper right corner** of the front (handle side) of the box. Place the barcode low enough so that the lid does not cover the label. Make sure the barcode is **NOT** placed on the lid of the box.



NOTE: Barcodes must be affixed to all boxes before they are sent to ACCESS.

Step 2:

Complete ACCESS's "Records Storage Form – New Box Submissions."

1. Write your departmental contact information in the allotted space.
2. **Required fields** are barcode, box size, destruction date, and description (65 character limit for faxed forms and 250 character limit for emailed forms).
3. The sequence begin/end and from/to date fields are optional.
4. Write the total number of cartons to be picked up.
5. 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.
6. Choose a service level (based on the time you are submitting the form to ACCESS).
7. E-mail this form to ACCESS at pittsburgh@accesscorp.com
8. ACCESS will create a workorder and a driver will be scheduled to pick up your items.
9. Departments **must sign a copy** of that workorder at the time the items are picked up.

Note: If the required fields are not submitted on the form, your office will be contacted. ACCESS will not pick up those items from your office until the required details are provided. Also, ACCESS 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 ACCESS in advance.

Step 3:

All materials must be ready for ACCESS's drivers when they arrive for pick up. You will be asked to sign a workorder that describes and quantifies your pick up request. You will be given a copy of the workorder for your records.

REMEMBER

Do not tape or place transmittal sheets on or in your boxes.

Do not write anything on the outside of boxes sent to off-site storage

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Off-site Records Storage & Services Users Guide

**Checklist for Containers Being Sent to ACCESS Record Center
Environmental/Climate-Controlled Area**

- _____ **Green** barcode label on each box.
- _____ Information for each box completed on the *New Box Submission* form.
- _____ Fax or email the *New Box Submission* form to ACCESS and retain a copy for your records.
- _____ Exact count and size of boxes.
- _____ Form is not inside of the box, nor descriptive information written on exterior of box.
- _____ Only **NEW** files were placed in the **NEW** boxes.
*Warning: Do not place **NEW** files in boxes that have previously been at ACCESS without updating the inventory submitted to Access.

CONSIDER

In the event that a particular box requires file-level indexing as well as climate-controlled storage, you will be supplied with an additional sheet of **Yellow** (blank) stickers to place beneath the **Green** box barcode.

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Off-site Records Storage & Services Users Guide

Preparing BOXES to go to ACCESS Record Center Vault Storage

*Please use a **PINK** box barcode on boxes that will be placed into the **VAULT**. This signals to ACCESS personnel that this box requires **VAULT STORAGE**.*

Step 1:

Place a **Pink** box barcode label on the **upper right corner** of the front (handle side) of the box. Place the barcode low enough so that the lid does not cover the label. Make sure the barcode is **NOT** placed on the lid of the box.



NOTE: Barcodes must be affixed to all boxes before they are sent to ACCESS.

Step 2:

Complete ACCESS's "Records Storage Form – New Box Submissions."

1. Write your departmental contact information in the allotted space.
2. **Required fields** are barcode, box size, destruction date, and description (65 character limit for faxed forms and 250 character limit for emailed forms).
3. The sequence begin/end and from/to date fields are optional.
4. Write the total number of cartons to be picked up.
5. 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.
6. Choose a service level (based on the time you are submitting the form to ACCESS).
7. E-mail this form to ACCESS at pittsburgh@accesscorp.com
8. ACCESS will create a workorder and a driver will be scheduled to pick up your items.
9. Departments must sign a copy of that workorder at the time the items are picked up.

Note: If the required fields are not submitted on the form, your office will be contacted. ACCESS will not pick up those items from your office until the required details are provided. Also, ACCESS 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 ACCESS in advance.

Step 3:

All materials must be ready for ACCESS's drivers when they arrive for pick up. You will be asked to sign a workorder that describes and quantifies your pick up request. You will be given a copy of the workorder for your records.

REMEMBER

Do not tape or place transmittal sheets on or in your boxes.

Do not write anything on the outside of boxes sent to off-site storage

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Off-site Records Storage & Services Users Guide

Checklist for Containers Being Sent to ACCESS Record Center Vault Storage

- Pink** barcode label on each box.
- Information for each box completed on the *New Box Submission* form.
- Fax or email the *New Box Submission* form to ACCESS and retain a copy for your records.
- Exact count and size of boxes.
- Form is not inside of the box.
- Only **NEW** files were placed in the **NEW** boxes.
*Warning: Do not place **NEW** files in boxes that have previously been at ACCESS without updating the inventory submitted to Access

CONSIDER

In the event that a particular box requires file-level indexing as well as vault storage, you will be supplied with an additional sheet of **Yellow** (blank) stickers to place beneath the **Pink** box barcode.

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Off-site Records Storage & Services Users Guide

Procedures for Requesting Containers

Retrieving Boxes from ACCESS:

Complete ACCESS's "Box Retrieval and Box Return Request" form.

1. Provide your departmental contact information in the allotted space.
2. Write the barcode numbers for those items to be retrieved from ACCESS and returned to your office in the table marked "Boxes Requested for RETRIEVAL from ACCESS."
3. Specify the total number of items you are requesting to be delivered to your office.
4. Provide the total quantity of boxes to be delivered to your office on that page.
5. 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.
6. Choose a service level (based on the time you are submitting the form to ACCESS).
7. E-mail this form to ACCESS at pittsburgh@accesscorp.com
8. ACCESS will create a workorder with only those barcode numbers listed and a driver will be scheduled to deliver those items to your office.
9. Departments must sign a copy of that workorder at the time the items are delivered.

Returning Boxes to ACCESS:

Complete ACCESS's "Box Retrieval and Box Return Request" form.

1. Provide your departmental contact information in the allotted space.
2. Write the barcode numbers for those items to be returned from your office to ACCESS in the table marked "Boxes Requested for Pick-up from Your Office."
3. Specify the total number of items you are requesting to be returned to ACCESS.
4. Provide the total quantity of boxes to be picked up from your office on that page.
5. 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.
6. Choose a service level (based on the time you are submitting the form to ACCESS).
7. E-mail this form to ACCESS at pittsburgh@accesscorp.com
8. ACCESS will create a workorder with only those barcode numbers listed and a driver will be scheduled to pick-up those items from your office.
9. Departments must sign a copy of that workorder at the time the items are picked-up.

CONSIDER

ACCESS will only deliver/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 delivered/picked-up from your office by ACCESS.

ACCESS will now track boxes using blue audit stickers affixed to all record boxes.

**To view large quantities of boxes at a ACCESS facility, please contact the University of Pittsburgh
University Records Management office*

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Off-site Records Storage & Services Users Guide

Box Retrieval and Box Return Request Form



University of Pittsburgh – Box Retrieval and Box Return Request Form

DEPARTMENT INFORMATION

Request Date: _____ Requestor Name: _____ Account/Department #: PPH064200 \ _____

Phone Number: _____ Fax Number: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

A. Box requested for Retrieval from Access	
# of Items	Insert Barcode #
1	
2	
3	
4	
5	
6	
7	
8	

B. Box requested for Pick-Up from your Office	
# of items	Insert Barcode #
1	
2	
3	
4	
5	
6	
7	
8	

Total # of items to be delivered from your office _____

Total # of items to be picked up from your office _____

Comments _____

Signature _____ Passcode (if applicable) _____ Page _____ of _____

Email this form to pittsburgh@accesscorp.com; FAX this form to Access at 412-321-0305. Please be certain to retain a copy of this form for your records.

September 2016

September 2016

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Off-site Records Storage & Services Users Guide

Preparing FILES to go to ACCESS Record Center

A small group of departments require ACCESS to maintain descriptive information for their records at the file level. These departments need to be approved by the University of Pittsburgh University Records Management office. To request information about these services, please contact [University Records Management](#).

This information applies only to File-Level departments.

Step 1:

Place a thin, white **file barcode** label on the upper right corner of each file in your box.



00000771564

Step 2:

Place a **Yellow box barcode** on the upper right corner of the front (handle side) of box. Place the barcode low enough so that the lid does not cover the label. Make sure the barcode is **NOT** placed on the lid of the box.

NOTE: *Barcodes must be affixed to all boxes before they are sent to ACCESS.*



Step 3:

Manually or electronically complete a File Inventory Transmittal Sheet and include the following Required Fields information:

- Box Barcode Number
- File Barcode Number
- Review/Destory Date (date box/file is to be reviewed/destroyed)
- Description (e.g. client/patient name, project, or matter)

Write and circle the number of files in the box on the outside of the box next to the barcode.

If you are submitting a large amount of files, it is permissible to complete an excel spreadsheet containing the required information. Please retain a copy of the transmittal sheet(s) for your records.

Step 4:

Fax or e-mail your form to ACCESS to request a pickup. Please provide the following information:

- Your name, account number, address (including floor), passcode (if applicable), telephone number and the time that the office closes.
- An exact count and size of all items that need picked up.

Step 5:

All materials must be ready for our drivers when they arrive for pickup. You will need to sign a workorder that describes your pickup request. You will be given a copy of the workorder for your records.

REMEMBER

Do not tape or place transmittal sheets on or in your boxes.

Do not write anything on the outside of boxes sent to off-site storage

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File Inventory

BRM's University of Pittsburgh

RECORDS STORAGE FORM – REVISED Transmittal Sheets Only



DEPARTMENT INFORMATION

Request Date: _____ Requestor Name: _____ Account/Department #: _____

Phone Number: _____ Fax Number: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

Total Cartons This Page _____

Comments (if applicable):

Signature _____ **Passcode** _____

Page _____ of _____

This form is to be used to modify existing box data for items already in storage at BRM. You may add new details about your items OR alter information already collected about your office's containers. If you need to submit NEW containers to storage, you must use the "New Box Submission" transmittal form.

FAX this form to BRM 412-321-5152 or email it to senddata@businessrecords.com. Please be certain to retain a copy of this form for your records.

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Off-site Records Storage & Services Users Guide

Checklist for File-Level Containers Being Sent to ACCESS Record Center

- Yellow** barcode label on each box.
- Place a file folder label on each file.
- Information for each file completed on transmittal sheet.
- Email the File-Level Inventory Transmittal Sheet to ACCESS and retain a copy for your records.
- Exact count and size of boxes.
- Transmittal sheet is not inside of the box.
- Only **NEW** files were placed in the **NEW** boxes .
*Warning: Do not place **NEW** files in boxes that have previously been at ACCESS without updating the inventory submitted to Access.

*NOTE: Please use a **yellow** box barcode on boxes that will be **file-level indexed**. This signals ACCESS personnel that the files inside of the box should be **scanned**.*

CONSIDER

The ACCESS Record Center is not a climate-controlled environment.

Magnetic media, audio/video tapes, and microfilm/microfiche should be stored in a climate-controlled environment and, therefore, should be stored in our vault or climate-controlled storage areas to prevent damage. Please consider storing your vital records, permanent records, important records, and long-term records in either ACCESS's vault or climate-controlled storage areas for added protection.

Contact the University of Pittsburgh University Records Management office for more information.

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Off-site Records Storage & Services Users Guide

Procedures for Requesting Files

Retrieving Files and/or Documents from ACCESS:

Complete ACCESS's "*Retrieving and Returning Files and Documents*" form for ordering unbarcoded files and/or documents from boxes. This applies to items within boxes that do not have barcode labels on them for which you need to retrieve from a container at ACCESS. 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).

1. Write your departmental contact information in the allotted space.
2. If the item you are requesting does not 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 ACCESS attempt to locate within the container in the "Description" field.
3. 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.
4. Provide the total quantity of items to be retrieved for your office on that page.
5. 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.
6. Choose a service level (based on the time you are submitting the form to ACCESS).
7. E-mail this form to ACCESS at pittsburgh@accesscorp.com
8. ACCESS will create a workorder with only the items listed and a driver will be scheduled to deliver those items to your office.
9. Departments **must sign a copy** of that workorder at the time the items are delivered.

Returning Files and/or Documents to ACCESS:

Complete ACCESS's "*Retrieving and Returning Files and Documents*" form for returning individual items you have retrieved from boxes at ACCESS.

1. Write your departmental contact information in the allotted space.
2. Provide the barcode number(s) of the items you wish to return to ACCESS for storage in the "Barcode" field. Please note that all previously unbarcoded files and documents will be barcoded at the time ACCESS delivers them to your office. Therefore, a barcode number will be associated with each respective file and document that has been retrieved.
3. Provide the total quantity of items to be returned from your office on that page.
4. 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.
5. Choose a service level (based on the time you are submitting the form to ACCESS).
6. E-mail this form to ACCESS at pittsburgh@accesscorp.com
7. ACCESS will create a workorder with only those barcode numbers listed and a driver will be scheduled to pick-up those items from your office.
8. Departments **must sign a copy** of that workorder at the time the items are picked-up.

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

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Procedures for Submitting Revised Transmittal Data

Submitting Revised Transmittal Data to ACCESS:

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

1. Write your departmental contact information in the allotted space.
2. 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 ACCESS. Users should select "replace" if you desire for ACCESS to erase what is currently on file for the respective items and replace it with the newly submitted data.
3. Complete the Barcode/Box # field (required).
4. If a review/destruction date is not already on file for the item, you must complete the "Destruction Date" field. If this information was previously submitted to ACCESS, you do not need to complete this field.
5. Complete any additional applicable fields on the form for which you wish to have data modified.
6. Provide the total quantity of cartons to be serviced for your office on that page.
7. 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.
8. E-mail this form to ACCESS to pittsburgh@accesscorp.com

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Off-site Records Storage & Services Users Guide

Records Destruction

The moment a record is created it is important to determine how long it needs to be retained. Once you have determined a retention period based on the University's records retention schedules, make sure it is placed on the ACCESS *New Box Submission* or *revised transmittal sheets* (labeled review/destroy Date). This review/destroy date will be entered into our database as a reminder only.

ACCESS **will not** destroy records without prior written authorization from an authorized representative of your department. The date can be changed at any time per your request to the University of Pittsburgh University Records Management office.

• Retention Schedules

Retention schedules provide University departments with guidelines on how long certain types of records need to be kept. By adhering to the retention schedules, departments create University-wide consistency in records maintenance. Please refer to the University's [General Record Retention Schedule](#) for University-approved retention guidelines, in addition to the University's [Financial Retention Schedule](#) produced and maintained by the Office of Budget and Controller. The schedule serves as a guideline for Budget and Controller departments and as a recommendation for other University departments.

• Research Data Management

The University of Pittsburgh maintains *Guidelines on Research Data Management*, which can be found on the University's Records Management website, which prescribes retention periods for research records.

One exception to the retention schedules above is for records concerning grant-funded projects. These records should be maintained according to guidelines implemented by the grant funding institution if they are required to be stored longer than the University's retention schedules recommend.

• Transfer to the University Archives

The University Records Management program is charged with assisting in completing records schedules for other University offices, departments, and units and facilitating the transfer of historical records to the University Archives. **In an effort to document the historical narrative of the University of Pittsburgh all University records pre-dating 1970 must be reviewed by the University Archivist prior to and disposition.**

If you are unsure of what date to apply to your records, or believe that your records should be permanently maintained in storage, please contact the University Records Management office

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Off-site Records Storage & Services Users Guide

Records Destruction Procedure

Procedure for Destroying Barcoded Records Stored at ACCESS

- Two months prior to your records destruction date, a report is sent from ACCESS to the University of Pittsburgh University Records Management office. This report includes the barcode number and descriptive information provided by your department when the box was sent to storage.
- One month prior to your records destruction date, the primary contact for the department will receive an e-mail with an attached copy of the below (pg. 34) report and instructions to complete, sign, and return an attached container expiration form to the University of Pittsburgh University Records Management office.

The container authorization form provides four options for each box:

D = Destroy

E = Extend Destruction Date

UA= Submit to University Archives

R= Retrieve for Review

- Once the signed container expiration form has been received, it is authorized by University Records Management. ACCESS is then notified that they may include these records on a destruction pre-workorder.
- The destruction pre-workorders are then sent from ACCESS to the University of Pittsburgh University Records Management office, where all barcode numbers are reviewed for accuracy. The University Records Management then signs off on the pre-workorders and returns them to ACCESS.
- ACCESS pulls the boxes on the destruction workorder and sends them to their shredding facilities, where the box and its contents are pulped and recycled.
- Once the records have been destroyed, a *Certificate of Destruction* is provided to the University of Pittsburgh University Records Management office and kept on file.

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Container Expiration Report

Company Department	0642 63190	University of Pittsburgh			From Date	To Date	Action	Requested New Destroy Date
Item	Destroy Date	Alt ID	Description					
13472270	2/1/2015		CQ ALMANACS BOX 3				D A R	/ /
13472341	2/1/2015		ANNEX BOOKS BOX 2				D A R	/ /
13472278	2/1/2015		US CODE				D A R	/ /
13472321	2/1/2015		ENCYCLOPEDIA AMERICANA, CONGRESSIONAL RECORDS				D A R	/ /
13472325	2/1/2015		CONGRESSIONAL RECORDS (CONFERENCE ROOM BOX 7)				D A R	/ /
13472368	2/1/2015		COMPENDIUM OF ACTIVITIES 100TH-101ST CONGRESS (DUPLICATES), PERSONAL LETTERHEAD/LEGAL PAPER				D A R	/ /
13710502	2/1/2015		BLANK LETTER HEAD, MISC				D A R	/ /
13472282	2/1/2015		CONGRESSIONAL RECORDS, US CODE				D A R	/ /
13472288	2/1/2015		US CODE, US TREATIES, CONGRESSIONAL RECORDS				D A R	/ /
13472331	2/1/2015		CONGRESSIONAL RECORDS (CONFERENCE ROOM BOX 4)				D A R	/ /
13472335	2/1/2015		CONGRESSIONAL RECORDS, CONGRESSIONAL DIRECTORIES				D A R	/ /
13472290	2/1/2015		HOUSE JOURNALS				D A R	/ /
13472294	2/1/2015		CONSTITUTION REVISED AND ANNOTATED, JEFFERSON MANUALS				D A R	/ /
13472272	2/1/2015		HOUSE JOURNALS BOX 4				D A R	/ /
13472276	2/1/2015		CQ ALMANACS BOX 5				D A R	/ /
13472319	2/1/2015		ENCYCLOPEDIA AMERICANA				D A R	/ /
13472323	2/1/2015		CONGRESSIONAL RECORDS (CONFERENCE ROOM BOX 2)				D A R	/ /
13472327	2/1/2015		CONGRESSIONAL RECORDS (CONFERENCE ROOM BOX 6)				D A R	/ /
13710500	2/1/2015		BLANK LETTERHEAD				D A R	/ /
13472280	2/1/2015		CONGRESSIONAL RECORDS				D A R	/ /
13472286	2/1/2015		CONGRESSIONAL RECORDS				D A R	/ /
13472329	2/1/2015		CONGRESSIONAL DIRECTORIES (BOOK BOX 11)				D A R	/ /

Container Expirations
Business Records Management

2/1/2015 2/28/2015

D=Destroy
 A=Archive
 R=Retrieve for review

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Off-site Records Storage & Services Users Guide

Records Destruction - Extension Procedure

Procedure to Request an Extension of Review/Destruction Date

A request for approval for an extension of a review/destroy date for a container at ACCESS must be sent to the University Records Management office and include the following information:

1. A brief explanation as to why the records must be retained past the original retention period for that record type.
2. The revised review/destroy date your department is requesting.
3. The signature of the Department Director or authorized signatory for the office.
4. In addition, a signed copy of the applicable “RECORDS DISPOSITION/DESTRUCTION AUTHORIZATION NOTICE” should also be returned to the Records Management Office. When requesting an extension period for records listed on the abovementioned form, departments should not choose any of the actions listed. Instead, beneath the last entry in the description field, write the revised review/destroy date for the records. You must then sign the bottom of the document in the allotted space.

This information should be sent to [University Records Management](#) via email.

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Off-site Records Storage & Services Users Guide

Records Destruction – Other Options

University departments also have two options available for the shredding of records currently in their office space: unbarcoded destruction and bin/console rotation. These services are available at **no cost** to University departments, however, **you are responsible for adhering to University retention guidelines and documenting what is being destroyed by your department.**

Unbarcoded Destruction

- ACCESS will pick up items to be shredded directly from your office in any type of copy or supply box available (i.e. you do not need to *purchase* a box for this service). Records may not, however, be placed in bags.
- You do **not** need to remove paper clips, staples, rubber bands, carbon paper, or envelopes from documents, but be certain to **remove binders or large plastic clips**.
- Additionally, for all unbarcoded destruction orders, you must have ACCESS's orange destruction stickers applied to all boxes intended for this service. Please use the *Supply Order* form if you are in need of those destruction labels.



Bin and Console Rotation

- ACCESS can provide your office with a 32, 68 or 95 gallon bin, or 30 gallon console, in which you can place your confidential records to be destroyed.
- Consoles and bins are locked (keys are available upon request to keep on-site) for the entire period of time they are placed in your office. Each bin or console is barcoded in Compliance with government regulations
- Your location is required to be placed on a required scheduled rotation. You will be able to select weekly, 2, 4, 6, 8 or 12 week rotation. In the event your console or bin has reach capacity prior to your schedule date, you may request additional service.



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Records Destruction – Procedure for Items Not Stored at ACCESS

For the options above, complete ACCESS's *Destruction Order* (pg. 38) form for ordering unbarcoded destruction or new bins/consoles for your office, as well as requesting that existing bins/consoles be emptied or removed.

1. Write your departmental contact information in the allotted space.
2. 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).
3. Provide the total cartons for unbarcoded destruction on the page.
4. 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.
5. If your bin/console is full, provide the total quantity of applicable bins/consoles for your office and check the "Swap/Empty" column. ACCESS typically services bins/consoles on Wednesdays. If you require the bin/console on a specific day, please call ACCESS's Customer Service Department at (412) 321-0505.
6. 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 ACCESS to permanently remove it from your office.
7. 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.
8. E-mail this form to ACCESS at pittsburgh@accesscorp.com
9. ACCESS will create a workorder with the service details specified on the *Destruction Order* form.
10. Departments must sign a copy of that workorder 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.

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

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Off-site Records Storage & Services Users Guide

Records Destruction Order Form



University of Pittsburgh – Records Destruction Order Form

DEPARTMENT INFORMATION

Request Date: _____ Requestor Name: _____ Account/Department #: PPH064200 \ _____

Phone Number: _____ Fax Number: _____

Street Address: _____ City: _____ State: _____ Zip Code: _____

UNBARCODED DESTRUCTION	
Number of Cartons	Size
Total Cartons This Page:	*Please separate media into individual boxes marked MEDIA

*Please use Access's orange destruction labels for this service and apply to to boxes to be destroyed. Any non-barcoded box can be used for destruction orders, i.e. copy paper boxes, moving boxes, etc...

CONSOLES AND BINS					
Type	Size	Quantity	Initial Request	Swap/Empty	Final Pick-Up
30 gallon console	22.75"W x 35.5"H x 15.75"D				
32 gallon bin	19"W x 39"H x 22"D				
68 gallon bin	24"W x 42"H x 26"D				
95 gallon bin	26"W x 46"H x 33"D				

*Departments are required to set a scheduled destruction rotation. Consoles and bin service is available outside your scheduled rotation upon request. Please contact Access client care at 412-321-0505.

Comments: _____

Signature _____ Passcode (if applicable) _____ Page _____ of _____

Email this form to pittsburgh@accesscorp.com; FAX to Access at 412-321-0305. Please be certain to retain a copy of this form for your records.

September 2016

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Off-site Records Storage & Services Users Guide

Additional Information

• Loose File Transfer

ACCESS will accept transfer of individual documents, or loose files, to and from storage secure transit bags. However, University Records Management recommends utilizing this service sparingly and in conjunction with the *loose file transfer* form available upon request.

• FileBRIDGE

FileBRIDGE is an online platform offered by ACCESS that provides UOP departments the ability to generate account inventories, requests materials for delivery, and submit supply orders. Additional functionality will be added as necessary. For a login and password, as well as training, please contact University Records Management.

• Computer Media Storage and Rotation

ACCESS offers secure climate-controlled storage for computer media, such as film, tapes, 4mm, 8mm, DLT, MiniDV, CD-ROM, CD-R, CD-RW, and DVD. ACCESS can also arrange a customized rotation schedule for your digital media, based on your department's needs. While these services are offered at no charge to your office, departments will be charged for the rental or purchase of tape storage and transport containers, which will appear on the same account as all other box charges.

Remember to consider the following:

- Will your tapes be inside a locked and barcoded case, or will the tapes be individually barcoded and have to be removed from a case for storage?
- What is the frequency you would like your tape rotations to occur; do you prefer a morning or afternoon delivery/pickup?
- If your data drives, tapes, or discs contain protected health information (PHI), please review that appropriate requirements for storing electronic media with PHI in off-site storage to remain compliant with federal and University regulations.

• Special Projects

The University of Pittsburgh utilizes ACCESS as the contracted supplier only in respect to off-site storage and destruction of files and records consisting of paper and alternative media. **All other services are outside of the scope of this agreement and are considered special projects.** The University Records Management office should be notified *in advance* of any requests for services to be placed on behalf of established Pitt accounts, such as large scanning, inventorying, high-volume storage projects, or transfer taking place outside of the Oakland campus area.

Your ACCESSS account is only to be used for University Records. The following types of materials and services are not permitted under the University's contract:

- Personal residences storage or non-University records.
- Destruction that involves non-University records.
- Destruction or moving requests that involve furniture, general office equipment, computer equipment (terminals, hardware, etc.), medical equipment, and filing cabinets.

Access Information Protected

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- **Surplus Property**

Departments should be aware that all University equipment that an office would like discarded must be channeled internally through [Surplus Property](#) at the University. Additionally, if you need to discard equipment that is considered a capital asset (defined as items that have an acquisition cost of at least \$5000, have an estimated life of at least two years, and are bought through a capital subcode 6100-6199), you must consult [Capital Asset Management](#).

- **Training**

Attendance at a training session is a requirement for establishing a new records services account through University of Pittsburgh University Records Management. As part of the account creation procedure, a training session will be scheduled with your office.

For accounts already established, the University Records Management office provides training to University departments on an as-needed basis throughout the year. To arrange a session for your office, please contact University Records Management.

In addition, University Records Management offers a bi-annual workshop through the [Faculty and Staff Development Program](#). To sign up for this course, you must register through the University of Pittsburgh Human Resources' program.