HOW TO Fill Out the Transmittal Sheet

164992981

Transmittal Sheet — ▲ IRON MOUNTAIN®

A CUSTOMER ID (REQUIRED). Write the four- or five-digit number on the transmittal sheet and on the large peel-off barcode label.
Note: If any of your cartons need the files listed individually, please put a green-bordered barcode label on each one. The green label lets Iron Mountain Data Entry know the carton requires individual listing.

B CUSTOMER NAME. Write your customer name here.

C DIVISION ID. If your account is set up by division, use up to 12 alphanumeric characters to enter the **Division ID** of the department here.
Note: You will use this field only if you are specifically set up to use divisions.

D DEPARTMENT ID. If your account is set up by department, use up to 12 alphanumeric characters to enter the **Department ID**.
Note: For easy retrieval of inventory if the account is set up by department, it is important to make sure the **Department ID** is noted on the cartons. Incorrect Department IDs will slow down the retrieval of inventory. For billing purposes, Iron Mountain can send records to a Master Department only.

E CUSTOMER BOX NUMBER. If, for internal tracking purposes, you assigned a carton number other than the SafeKeeper PLUS barcode number, write that number here.

F RECORD CODE. If you are set up to use extended record codes, complete blocks 7 through 10. Use up to 10 alphanumeric characters.
Note: Only accounts specifically set up to use extended record codes should use blocks 7 through 10. These codes will auto-calculate the destruction dates for inventory and also allow the correct retention period to be automatically assigned to cartons.

G DATE RANGE FROM/TO. Enter the earliest date and the most recent date (mm/dd/yyyy) of the records in the carton so that retention can be calculated.

H ALPHANUMERIC RANGE FROM/TO. Enter the beginning and ending alphabetical/numerical ranges of the records, which can be used to describe:
- Name range (Jones through Smith)
- Numeric "field" range (20450 through 20567)
- An alphanumeric "file ID" range (AD123 through BZ784)

I CREATE DATE. This date (enter as mm/dd/yyyy) shows when the materials were packaged and labeled for storage or when the records were originally created. Retention can be calculated from this date.

J EVENT DATE. If applicable, write the date (mm/dd/yyyy) of the contents in the carton. Retention will be calculated from this date.

K DESTRUCTION ELIGIBILITY. This date shows when the carton is scheduled for destruction. Leave this section blank if **destruction eligibility** is based on **record codes** (see **F**). If your account **does not** use record codes to determine when a carton is eligible for destruction, either:
- Write in the destruction date (mm/dd/yyyy) **or**
- Check one of the **destruction indicators**: permanent or undefined.
Note: If your account is not set up to use record codes, it's important that you provide either a destruction date or a destruction indicator to show which cartons are eligible for destruction and which should remain in storage.

L HOLD CODE. This code extends the carton's retention period and needs to be set up in the system before using. If you want the records to be kept permanently, check the box under Destruction Eligibility.

M MAJOR DESCRIPTION. To make identification easier, describe what's in the carton.

N MINOR DESCRIPTION. For additional ease of identification, you can enter more details about the contents of the carton here.

O REFERENCE #1. Use this field for any additional cross-reference information about the carton.

P PREPARER'S FULL NAME/DATE/DIVISION ID/DEPARTMENT ID/ TELEPHONE NUMBER (WITH EXTENSION)/FLOOR. Fill in all of these fields.

STEP 1

CHOOSE BARCODE LABELS

OPTION 1
Use RFID-*ready* box; includes built-in RFID barcode label and option to check one of the following (if applicable):
☐ Listed ☐ Imaged

OPTION 2
Purchase and apply RFID Blue Label to create an RFID-*ready* box. Boxes will be sent directly to the shelves for storage.

OPTION 3
Select and apply one of the following non-RFID labels:

BLACK LABEL
Boxes will be sent directly to the shelves for storage.

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GREEN LABEL
Boxes will be individually listed and stored based on the file and box label information.

564815497

ORANGE LABEL
Boxes will be sent to the Document Imaging Center to be imaged for electronic retrieval.

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STEP 2

FILL OUT THE TRANSMITTAL SHEET

REQUIRED FIELDS
Customer ID
Division ID (if division enabled)
Department ID (if department enabled)
Barcode Label

OPTIONAL FIELDS
Using the optional fields makes it easier to locate and manage your records. Please complete all optional fields as appropriate.

Depending upon how your account is set up (by Division ID or Department ID, for example), your organization may be required to complete some of these optional fields. If you need assistance in learning whether yours does, please contact Customer Care.

SEE REVERSE SIDE
for more information about these optional fields.

STEP 3

WRITE YOUR CUSTOMER ID ON THE LABELS AND AFFIX LABELS TO THE TRANSMITTAL SHEET

OPTION 1
For RFID-*ready* boxes, peel the smaller, identically numbered barcode label from the larger RFID label on the box and place on the Transmittal Sheet.

RF004182184

OPTION 2
For all other labels and non-RFID-*ready* boxes, place the large peel-off barcode label on the box info panel as shown below.

▲ IRON MOUNTAIN

Box Info Panel
for large label

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SafeKeeper PLUS®
Barcode Labels

Transmittal Sheet

Place the smaller, identically numbered barcode label on the Transmittal Sheet.

STEP 4

PLACE YOUR PICKUP ORDER

It's easy, and there are four convenient ways:

ONLINE: Iron Mountain Connect™
www2.ironmountainconnect.com

PHONE:
US: 1 800 934 3453
CANADA: 1 800 FASTFILE®

**EMAIL:** order@ironmountain.com

FAX: 1 800 934 5348

When placing an order, you will need to have the following information available:

✓ Customer ID

✓ Division (if division enabled)

✓ Department (if department enabled)

✓ Box count and box size

✓ Special Instructions for the driver

STEP 5

READY FOR PICKUP

✓ The driver will come to your site to pick up your boxes.

✓ Hand all transmittals to the driver. **Please do not place** transmittals inside the boxes. The driver will scan and take the boxes.

✓ Next, sign the scanner and your order is complete.
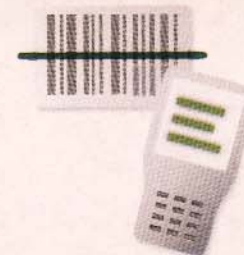
TO ORDER SUPPLIES

ONLINE: Iron Mountain Connect™
www2.ironmountainconnect.com

US: 1 800 934 3453

CANADA: 1 800 FASTFILE®

YOUR FINAL CHECKLIST

○ Are the boxes completely full?

○ Are the labels/transmittals complete and in their proper location?

○ Are your transmittals ready to hand to the driver? (And remember: **DO NOT** tape, staple or place the transmittals inside the boxes.)

○ Did you advise Iron Mountain of any special instructions for the pickup (steps, lack of an elevator, dock access, hours, etc.)?

HAVE QUESTIONS?

Call Customer Care at
US: 1 800 934 3453 or
CANADA: 1 800 FASTFILE®