Iron Mountain Adding Boxes and Files

IMPORTANT POINTS:

- Facilities on contract to use Iron Mountain long term off-site storage & retrieval system will have access to the Iron Mountain Connect Portal.
- The Iron Mountain Account Manager will provide user names and passwords to those who will be creating boxes and files at the request of the program's Access Coordinator.
- Inventory shall be added to the Record Centre through the Iron Mountain Connect System.
- Users shall enter data in a consistent manner.
- Data entered into the portal will remain as online data and is held in a virtual holding area until scanned by Iron Mountain. A pick up order must be created to have an Iron Mountain courier pick up and scan the boxes.
- Data entered by the user that is not at Iron Mountain, can only be seen by the user that entered the data or by the system administrator.
- Barcode labels are supplied by Iron Mountain and may be ordered online.
- For ease of destruction, Records with the same retention period shall be stored in the same box.

PROCEDURE:

Process to Add Boxes
1. Refer to this link select the *Creating A New Box* and *Creating A New File* section for further clarification:https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos
2. Click '*Enter Records Management*"
    - Select the *Pickups, Add Records* tab at the top of the screen
    - Select *Pickup List (Add Records)*
    - Select *Add Box* tab
    - Choose Box Type *Standard Carton*
3. **Customize** the layout of the page if required.
    - Click 'Customize Layout'.
    - Select the fields in the screen shot below.

- Click 'Save' to save the customized layout.
   ***Note:** The layout will remain at the next log in and will not have to be changed again.*
4. **SKP Box/Barcode Number –** Enter the barcode number off the Iron Mountain label affixed to the box.
5. **Customer Box Number –** Enter the same barcode number.
6. **Division ID –** Defaults to the user's facility or departmental location.
7. **Department ID -** Defaults to the user's facility or departmental location.
8. **Major Description –** Enter the type of Record being archived from one of the following categories and year if applicable:
   - **20** Death Records** (use the client's year of death).
      ***Note:** The old terminology of "Charts" was used in the past, but replaced with "Records".*
   - **Historic** followed by the facility name or departmental location.
   - **Log** followed by the facility name or departmental location.
   - **Statistics** followed by the facility name or departmental location.
   - **20** NST** (use year NST performed) - *Only the year the NST was performed was used in the past, but for more clarity the term NST has been added.*
   - **Inactive Charts**

- *Note: A year range may be used in the event Records from different years are boxed together. For example 2008-2009 NST.*

9. **Minor Description –** A description of the contents may be entered to provide more clarity. Enter the appropriate description in the formats shown below:
   - Assorted Items (this minor description is used when many different historic items are in one box).
   - Type of Log and Year Range
     (For example: Inpatient 1990-1991 or Operating Room 2001-2002)
   - Type of Statistical Information followed by Year Range
     (For example: MB Health 1987-1988)
10. **Alpha From & Alpha to –** If the box contains client Records, enter the lowest
    - Record number in the box to the highest Record number in the box. For items such as historical items, log books, statistical Records, leave blank.
    - *Note: In the absence of Record numbers use alphabetical order (i.e. Alderson to Hanson).*
11. **From Date & To Date –** Enter a date range that will include all Records using the first day of the calendar year and the last day of the calendar year (i.e. 01/01/2001 and 12/31/2003).
    - For death Records use a date range that captures **the date of death**.
    - For inactive Records use a date range that captures **the last date of encounter.**
12. **Destruction Indicator -** This field is enabled when the retention period of a Record is permanent.
13. **Destruction Date –** It is **mandatory** to enter a destruction date or a destruction indicator of 'permanent'.
    - Dates will always be January 01, 20** with the year of destruction dependent on the Record type and the latest retention period of the Records in a box. *For example; the box contains death Records from 2008 and 2009. The destruction date for all items in the box is based on the retention period for 2009 death charts which is 01/01/2020.*
    - Refer to policy *ORG.1410.PL.201 Retention and Destruction of Personal Health Information*.
14. **Long Description –** This field is used when a box contains several different types of Records under the same category or if the information can provide more clarity as to the contents of the box.
15. If an individual listing of Records within the box is required, click the 'ADD FILE' button to itemize and describe Records <u>within</u> the box.

Add Files or Records
1. **Customize** the layout of the page if required.
   - Click 'Customize the layout of this page'.
   - Select the fields in the screen shot below

New File

        ❓ Close ✖

| Save & Close | Save & Add | Cancel | >Customize Layout |

Enter detailed information about this file. Lock fields to retain and reuse the data that you entered, similar to a template. The file is assigned the status of the box to which it is added. *Required field

Customer
WX074 [SOUTHERN HEALTH]

File Division
BOUNDARY [BOUNDARY TRAILS HEA ▼

File Department
71190 [HEALTH INFORMATION SERV ▼

SKP Barcode
555

Customer Box Number
555

Birth Date (lock)
[   ] 📅

Volume Number (lock)
[   ]

***File Description 1** (lock)
[   ]

File Description 2 (lock)
[   ]

File Description 3 (lock)
[   ]

- Click 'Save' to save the customized layout.
- *Note: The layout will remain at the next log in and will not have to be changed again.*

2. Add Records within the box, filling in all applicable fields for each Record.
   - *Note: For quicker data entry, fields can be locked and unlocked.*
   - *See page 54 of the ORG.1410.PL.402.SD.10 Iron Mountain Connect User Guide.*

3. **SKP Box/Barcode Number –** Enter the barcode number off the Iron Mountain label, affixed to the box.
   - Click *Lock to lock this field.*

4. **Customer Box Number –** Enter the same barcode number.
   - Click *Lock* to lock this field.

5. **Division ID –** Defaults to the user's facility or departmental location.
   - Click *Lock* to lock this field. This field must match the field for the box.

6. **Department ID -** Defaults to the user's facility or departmental location.
   - Click *Lock* to lock this field. This field must match the field for the box.

7. **File Description 1 –** Record Number - preceded with "0(s)" if the number is 5 digits or less (i.e. "012345" or "001234"). For those Records **without** a regional number, precede with the facility initial (i.e. Bethel, B12345).

8. **File Description 2 –** Last Name, First Name.

9. **File Description 3 –** Last date of activity or date of death (MM/DD/YYYY).

10. **Birth Date –** MM/DD/YYYY.

11. **Volume Number** – Leave blank for singular volumes.
12. **Repeat** the steps until **all** Records have been entered within the box.
13. **Create** a database that will include the box label number and the Records being held in the virtual holding area under the user's id.
    - ENTER RECORDS MANAGEMENT
    - CHOOSE PICKUP, ADD RECORDS tab
    - CHOOSE PICKUP LIST (ADD RECORDS) tab
    - CLICK "EXPORT" ON THE TOP RIGHT SIDE
    - Select 'File'
    - Select 'Save As'
    - SELECT "*HIS Q*- DRIVE" (Each program to create own file path)
    - SELECT "RECORDS"
    - SELECT "IRON MOUNTAIN"
    - SELECT "VIRTUAL HOLDING"
    - Save to your department's folder under the users name i.e. RECORDS/IRON MOUNTAIN/JANEDOE/VIRTUAL HOLDING
    - ***Note****: If more Records are added prior to a pickup, a new database will need to be created to include the new entries.*
14. Outguide Health Records (if applicable) to Iron Mountain (Use the mass move option in Winrecs)
15. Further clarification on placing a pick up order is located within this link:
    https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos

Logging Out
1. The user may log out at any time.
2. Logging in and re-entering the Record Management will bring the user to the same screen containing the same number of Records entered into the record centre.
3. **Verify** the number of 'Records Added' has cleared to '0' 48 hours after the boxes have been scanned for pick up by Iron Mountain.
   Contact *the account manager of delegate if the number of 'Records Added' is not "0". This could mean a box has been incorrectly entered or not scanned.*