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.
- Pickup orders can be created for items to be transported to Iron Mountain using the Iron Mountain Connect System. These items can be Records for refile or new Records for storage.
- Users of this checklist can refer to *Placing a Pick Up Order* for further clarification located within this link: https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos
- Records for shipment to Iron Mountain must be entered in the portal.

PROCEDURE:

1. Log onto Iron Mountain and **click** the "Records Management icon".   Select pickup, Add Records at bottom right corner.
2. Refer to *Placing a Pick Up Order*: https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos.
3. Select the appropriate carton for pick up and record the number.
   Note: For large shipments, contact the sales representative or account manager directly.
4. Once a request is submitted, confirmation for future reference. A confirmation will also be emailed to the user. Retain a copy of the emailed confirmation for one year.
5. For large **annual shipments** retain a data base of the items shipped for one year.
6. **Verify** the number of 'Records Added' for all users 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" for a user. This could mean a box has been incorrectly entered or not scanned.*