Iron Mountain Permanent Withdrawal and Destruction

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.
- Users of this checklist can refer to "Retrieving Stored Records" refer to link: https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos
- A **Permanent Withdrawal** is the customer initiated process of removing a box or Record from inventory with no intention of sending it back to storage. Once permanently withdrawn, the Record is assigned a WTH (withdrawn) status.
- **Destruction** is the process by which customer authorized Records are permanently disposed of by Iron Mountain. Once destroyed, the Record is assigned a DST (destroyed) status.
- Records with the same retention period are stored in the same box. Once all Records are destroyed and the box removed from the organization's inventory, the organization will no longer be charged for the storage of that box.
- Following Policy *ORG.1410.PL.201 Retention and Destruction of Personal Health Information*, *ORG.1410.PL.201.SD.02 Record Destruction Log* shall be completed and retained indefinitely with the Final Destruction Listing.
- An **Authorized User** is a select user that has been assigned the rights to request the destruction of Records or to permanently remove Records at Iron Mountain.
- To initiate the destruction process a written request must be received by Iron Mountain from an Authorized User.

PROCEDURE:

Permanent Withdrawal:
1. Log onto Iron Mountain.
2. Click 'Records Management". Click Search, Retrieve located bottom left screen
3. The system displays the Basic Search screen. Select All, Boxes or Files and type in information in the blank field. Click blue arrow.
4. Once the results have been returned, Select 'Add to Cart' for the item(s) to be put in the cart. The "Add to Cart" will say "Removed" now.
   Note: The options available will vary according to user privileges.
5. From the top of the page, click the 'Cart Contents' labelled Retrievals top right screen link to display the Cart options screen.
6. Under retrieval Method select "Permanently Withdraw".
7. Select Bill to Division and Bill to Department. Click "Next" and confirm the order request.

8. Verify address and delivery contact. Select shipping priority and click "Place your order".
9. If applicable, out-guide Records to the appropriate location.
10. An email confirmation will be sent to the Authorized User. Retain for one year.

Destruction:
1. Log onto Iron Mountain.
2. The destruction guide is a separate document from Iron Mountain as only authorized users will receive. Email request to Iron Mountain if not available.
3. Scroll below to Reports to request the Destruction Eligibility Report.
4. **Report Category -** Retention.
5. **Select a Service Area** – Record Centre.
6. **Select a Report –** Destruction Eligibility List.
7. **Customer** –Select your customer name
8. **Division ID –** Select appropriate facility or departmental location from drop down.
9. **Department ID -** Select appropriate accounting number and program.
10. **Destruction Date** – 01/01/current year or upcoming year.
11. **Sort by** – Customer Box Number.
12. **Report Format –** select report format.
13. Click 'Submit'. The system will display a Report Confirmation Screen.
14. **Return** to the Report Centre at a later time to retrieve the report.
15. **Photocopy** the Destruction Eligibility Report and highlight the box number plus the SKP Barcode Number of the Records to be destroyed.
16. **Attach** a letter signed by the Destruction Authorized User to the Destruction Eligibility Report that clearly states the highlighted Records are authorized for destruction by Iron Mountain. This can be emailed to DestructionOrderProcessing@ironmountain.com
17. **Address** the letter to the local Iron Mountain Data Entry Department. Contact the Iron Mountain Account Manager for the address.
18. Upon receipt of the destruction request Iron Mountain will create a destruction order from which a Preliminary Destruction Listing is issued.
19. **Review** the Preliminary Destruction Listing, sign and return to Iron Mountain. If the Preliminary Destruction Listing needs to be changed, proceed with the following steps outlined in the *Destruction Guide.*
20. If applicable, **outguide** Records as destroyed with the date of destruction.
21. Once the destruction order has been processed a Final Destruction Listing is automatically generated and sent to the Destruction Authorized User.
22. **Attach** the Final Destruction Listing to *ORG.1410.PL.201.SD.02 Record Destruction Log* and retain indefinitely.
23. A Certificate of Destruction statement will be emailed, charges for service will appear on the next Iron Mountain Invoice.