

Guidelines Manual for Archiving Documents



Trusted, secure, confidential document storage

Introduction

Welcome to **The Box Vault @ RSS**. Throughout this manual we will try to guide you through the various processes in place to help you archive, help us find the correct archive material efficiently and deliver the correct item back to you when required.

The process is not difficult but has to be done in the correct way consistently to achieve the best results. Our main ambition is to offer cost efficiencies and that can only be achieved by following guidelines.

Your welcome pack gives you a tool kit to manage the whole process. At any point if you are having difficulty please just phone our Customer Service Centre on **01506 443240** and they will be able to help you.





Ready to box up?

Once you are ready to place archive material off site you will need to have a few pieces of information to hand. Those are as follows:

- Have you got your welcome pack with bar codes and new box deposit schedules?
- Do you know your account number?
- Are you retrieving by file or by box?
- Have you chosen your archive boxes and are they in stock?
- Do you know the retention criteria?
- Have you catalogued the box and know the contents?
- How do you reference your boxes?
- If you are doing it online have you got your username and password ?

Once you know all of the above you can proceed.

Box by box archiving

The simplest way to archive material off site is to operate at what we refer to as 'Box Level'. This way you fill boxes, you bar code them, you log them on the New Box Deposit Schedules and we pick them up. If you need one back you let us know the box bar code or your reference on the box and we return it to you. For your reference all box bar codes are prefixed with a 'B'.

This way we never go into your boxes to retrieve files and have no 'interest' in the contents of your boxes.

However if the box is full of patient records it is not an efficient way to operate given that you probably only require one record out of that particular box.

If not adding boxes online you must fill in each heading of the new box deposit schedules.

The headings are:

Client name

Department number and contact name

Address (including Postal Code)

Account number

Client Box/Item reference no.



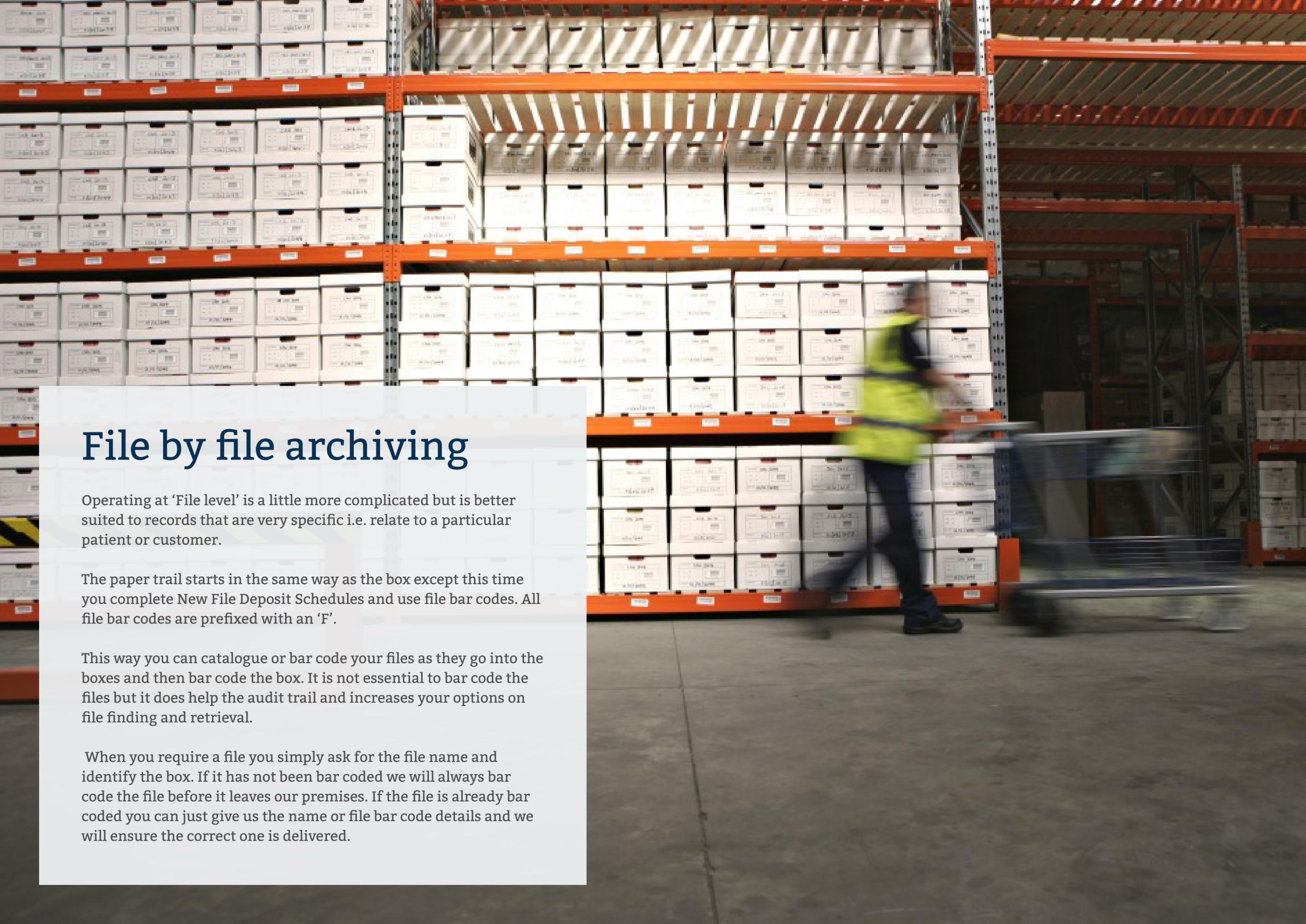
Each box or item must be listed individually

If doing this process online these forms are optional.

It is a mandatory obligation for you to fill in the review date. This not only helps with good housekeeping in the future but also makes sure that you only store the material that is to be kept and are not incurring unnecessary cost.

It also means that we can produce accurate meaningful management information which helps with budget planning accuracy.

Lastly but most importantly is to ensure that the full box weights do not exceed 16kg which is the maximum weight guidelines for UK Health and Safety legislation. Please do not overfill boxes and ensure that the lids on the boxes are flat fitting.



File by file archiving

Operating at 'File level' is a little more complicated but is better suited to records that are very specific i.e. relate to a particular patient or customer.

The paper trail starts in the same way as the box except this time you complete New File Deposit Schedules and use file bar codes. All file bar codes are prefixed with an 'F'.

This way you can catalogue or bar code your files as they go into the boxes and then bar code the box. It is not essential to bar code the files but it does help the audit trail and increases your options on file finding and retrieval.

When you require a file you simply ask for the file name and identify the box. If it has not been bar coded we will always bar code the file before it leaves our premises. If the file is already bar coded you can just give us the name or file bar code details and we will ensure the correct one is delivered.

How do I get a box back?

Once you have identified the box you require you have a few options.

The best way to order a box is online. Assuming you have an access account simply search for the box online, add it to your cart, go to the checkout and order it. You will then receive the box you have requested on the next delivery run. Normally this is on a next day basis.

If you do not have web access then you can just order the box via fax or e-mail. Faxed requests tend to be more reliable than e-mail especially in large organisations.

In extreme cases we will accept verbal requests but understandably this must be followed up with a written request. At all points through the process we form the audit trail and that request with a signature is an important part of it.



Can I retrieve electronically?

You can retrieve electronically if you have an e-account. Initialising this process takes a few days once the appropriate authorisations are in place.

For further information on this service please contact our Customer Care advisors who will deal with your request.

We also offer a scanning service for archive material that is accessed frequently or if there is a lack of office space for current material.

Collections

We collect boxes and files on the same trip. Large collections of new boxes (more than 100) are best planned in advance and your assistance in planning for large moves is appreciated. There is often an element of preparation at the client's end that needs to be completed for large scale moves to ensure a smooth exchange.

Large collections of files for cataloguing is also that requires an element of planning as we always intend to offer business continuity through the transfer process.

If you are transferring from another provider once we have authorisation we will deal with all of the planning with the incumbent supplier to ensure business continuity and giving you less hassle in the process. There may be costs involved in terminating the incumbent suppliers contract and those costs will invariably have to be settled prior to moving.

For transfers we offer full consolidation, cataloguing, packing and transport within the service to assist the process.



Review and Destruction

The purpose of the review process is to manage your retention better. If you supply dates for the review of the retention of your box or file we will produce reports periodically to make recommendations on destruction.

We will not automatically destroy boxes when that date comes round.

Once authorised for destruction we will produce a Destruction order with the relevant material on the order. This will be brought in hard copy format to your office for signature by the requestor plus their line manager. Without these approvals there will be no destruction carried out.

All destruction is secure through accredited suppliers.





Online access

Encrypted secure Online access is available to all users with unique usernames and Passwords which change on initial entry. There is a cost for this of £50 per user so unless you have more than 200 boxes in offsite storage then it is difficult to justify.

There are significant benefits though which will help your cause. All details captured on the system are live so at any time you can see exactly what you have in storage and all fields are searchable in full or in part. The main fields relating to the contents and description of the box are fully editable giving you full control.

Additionally you are in control of your review dates – an ever important part of the process.

If you work at file level then we would recommend you use the online ordering. This is a far simpler method of operation and achieves far greater accuracy of data.

Purchase order requirements

Where purchase orders are required for payment of invoices it is important that you issue purchase orders for the estimated annual value of the storage and services in advance. This saves on huge amounts of time and gives you control over your annual spend. For small sums we prefer to issue invoices quarterly or annually to save on administration.

Frequently asked questions

Q: If I give you a box with a destruction date on it will you destroy the box on that exact date?

A: No. We use that date for review only. Based on those dates though we produce regular management reports and make recommendations for destruction based on that evidence. We do not destroy any material without the correct authorisations. The reports we produce are free of charge.

Q: Do I have to re-box all my old boxes into your make of boxes now?

A: No. We take most makes of box. The important point to remember is to make sure that the box you want to use is fit for purpose. Your archive material could be in those boxes for up to 30 years so make sure the box is going to be strong enough. More importantly do not overload them with more than 16kg.

Q: How do I know what barcodes to use?

A: The bar codes for the boxes are prefixed with a 'B'. Those for files are prefixed with an 'F'. We issue barcodes in the welcome pack or on request through our helpdesk. All bar codes go on the end of the box – please do not put barcodes on lids of boxes or on the sides.

Q: Will someone else have bar codes like mine?

A: No. Each barcode is unique. It will never be replicated on our tracking system.

Q: If I ask for a box back how quickly will it come?

A: Next day is the standard default service. You can have it same day but that costs more.

Q: How do I find out where a box is quickly?

A: The quickest route to locating boxes is online. Failing that just phone our helpdesk and anyone answering the phone will be able to help you. Before you telephone though make sure you are authorized to do so. You can also make a fax or email request assuming you are not showing personal information which would breach Data Protection legislation.

Q: If I order a large box collection how quickly will that be done?

A: Next day is the standard service. Larger collections of more than 250 boxes can take a bit more planning so just speak to the help desk staff.

Q: Can you catalogue the contents of my boxes?

A: Yes. Just phone our help desk and we take you through the process, discuss the fields you need to capture, the best cost options and schedule that in for you on a suitable date.

Q: How secure is your facility and do the public get access to your premises?

A: Our facility is fully secure with access control on all doors and digital colour recorded CCTV within a ring fenced site. There is no public access at all. Access is available by appointment only.

Q: Can I come to view my files at your premises and what is the cost?

A: Yes. We have a facility for you to view files in a warm environment within a lockable facility. There is no charge for use of it although there will be costs for retrieving the information and refilling after inspection.

Q: Do you employ part time agency workers?

A: No. All our staff are full time employees. Given the security and confidentiality involved in what we do this is the best way to control it. All our staff are Disclosure Scotland checked.

Q: How do you find my files?

A: Our entire warehouse is controlled by very sophisticated software. At all stages of the process we know exactly where everything is located. Our Audit process is all part of the checking and double checking process we go through to make sure this is the case.





Contacts for your records

The telephone number for all contacts are the same **01506 443240** or Freephone **0800 073 6683**. Fax number for all contacts is **01506 435639**

General Enquiries, Sales and Web

Allan Hartley

Contact: allan.hartley@removalservicesscotland.co.uk

Mobile: 07881 942472

Graham Byers

Contact: graham.byers@removalservicesscotland.co.uk

Mobile: 07887 870717

Ordering

Jennie Burnet

Contact: jennie.burnet@removalservicesscotland.co.uk

Mobile: 07881 922012

Complaints

Ian Wright, MD

Contact: ian.wright@removalservicesscotland.co.uk

Mobile: 07881 781558

All general enquiries can come through on **admin@removalservicesscotland.co.uk** if required.

Good luck and if you need help just lift the phone!