

The Law Firm wishes to have one vendor to handle all of their off-site records needs with the exception of their Atlanta Office. Currently all of the offices (except Atlanta) appear to have separate contracts with multiple vendors. If possible it is The Firm's wish to have one contract and one bill, with the services itemized for each location affected by the contract.

## **Checklist Sections and their Intended Purpose**

### *Section 1.0 Customer Profile*

This section is used to identify the environment, current needs, required service levels, future potential growth, and any unique needs the organization may have. It is primarily intended for internal use, although some of this information may be necessary to the RFI or RFQ process. Unique needs or requirements may have an impact on the pricing structure the storage provider can offer.

### *Section 2.0 Provider Profile*

This section gathers basic organizational and financial information from potential service providers.

### *Section 3.0 Off-Site Storage Specifications*

This section addresses specifics regarding the storage environment, fire and security protection, transportation and available technical services. Technical services may include on-line capabilities, invoicing, billing, report generation and retention scheduling.

### *Section 4.0 Pricing and Agreements*

This section addresses a range of cost alternatives offered by storage providers. It is used to gain an understanding of the storage provider's *ordinary* services and contract levels. Examples are, service pricing options, invoice formats, payment terms, price increase limits, etc.

### *Section 5.0 Contract & Cost*

This section addresses more detailed cost and contract term provisions. Examples are: service pricing details for storage, retrieval, refile, transportation, data entry, insurance, contract termination, destruction, and private vaults.

### *Section 6.0 Glossary*

Explanations and definitions for key terms used in this publication.

**Section 1.0 – Customer Profile**

**CLIENT RFI/RFQ FACT SHEET**

**Contact Information**

1.001	Name and Title of Primary Contact	
1.002	Telephone Number of Primary Contact	
1.003	E-mail of Primary Contact	
1.004	Fax Number of Primary Contact	
1.005	Address of Primary Contact	
1.006	Primary Billing Address	
1.007	Deadline and response address for returning RFI or RFQ	
1.008	Time, date and location of pre-bid conference and RSVP contact information (if applicable).	

**Location(s) Requesting Service**

1.009	Address of Primary Location Requesting Service.	
1.010a	Address of Each Additional Location Requesting service	
1.010b	Address of Each Additional Location Requesting service	
1.010c	Address of Each Additional Location Requesting service	
1.010d	Address of Each Additional Location Requesting service	

## Volume of Materials

1.011	If paper records storage services are requested, identify current volume of records boxes..	Cases	
1.012	Describe and indicate measurements for the types of containers used to house various materials for storage and the materials typically stored in them. What is considered a standard record Box 1.0 c.f. Or 1.2 c.f.	Standard Records Boxes	
1.013	Describe the approximate volume of retrievals, deliveries and refills per month for each location.	Daily deliveries and sometimes twice daily	
1.014	Are any of your records currently stored with a third party vendor?	X yes	<input type="checkbox"/> no

## Contractual Relationships

1.015	Indicate an acceptable contract term (number of years) for the services requested and whether this is a firm or flexible requirement.	5 years	
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## General

1.016	Indicate whether you would like to be notified in the event a vendor chooses not to respond to the RFI or RFQ.	x yes	<input type="checkbox"/> no
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## Section 2.0 - PROVIDER PROFILE

***This section affords an opportunity for the service provider to supply basic organizational and financial information. When reviewing service offerings, it is necessary to compare the service needs of your organization with the service offerings of the suppliers. If you are a small organization, with records centrally located, it may not be as important to you where the different supplier facilities are located. If your organization has multiple offices at several different locations, delivery service and cost may be dependent on the supplier facility location.***

### Organization Information

Name of Organization:	
Street Address:	
City:	
State/Prov.:	
Zip/Postal Code:	
Phone:	
FAX:	
Contact Name:	
Contact Phone:	
Contact E-mail:	
Alternate Contact Name:	
Alternate Contact Phone:	
Alternate Contact e-mail:	

### Service Offerings

2.001	What is the ownership structure of your company (i.e. family-owned, sole proprietorship, partnership, equity investor, corporation, or other)?	
2.002	Please attach an organization chart for your company. If applicable, charts should include multiple locations.	
2.003	If your company has a Dun & Bradstreet number, please provide it.	
2.004	Is your company financially capable of providing the services on a scale defined in Section 1.0 Customer Profile?	<input type="checkbox"/> yes <input type="checkbox"/> no
2.005	Is your company capable of providing service for all required locations as defined in Section 1.0 Customer Profile? If so, please have all locations completion Section 3.0 Off-Site Storage Specifications	<input type="checkbox"/> yes <input type="checkbox"/> no
2.006	If not, what alternatives do you propose to meet the service needs in those markets?	
2.007	How many years has your company been providing commercial information management services?	
2.008	In addition to requested services as defined in the Fact Sheet, what services does your organization provide?	

2.009	Which of these services are provided by your employees?		
2.010	Which of these services are provided by subcontractors?		
2.011	Are your employees and subcontractors bonded?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.012	Do you provide services for clients that are in a similar industry to ours?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.013	Please provide at least three current references, including customers from the legal industry if available. Explain how long each company has been a customer.		
2.014	In what associations or organizations does your company or do your key individuals actively participate? Attach an explanation referencing this section and item number.		
2.015	Is staff actively encouraged to continue education/acquire new skills? (e.g.: evening classes, courses, etc)	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.016	Do you have any credentialed employees (i.e., CRM, CDIA, MIT, CA)? Circle All That Apply	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.017	If so, what services do they provide? Attach an explanation referencing this section and item number.		
2.018	Are employees aware of HIPAA and Privacy Act requirements?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.019	What distinguishes you from your competition?		
2.020	In your operations, are special certifications required and maintained by current employees, such as CDL's, forklift certifications?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.021	Is your firm ISO 14001 Compliant?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.022	Is your company ISO 9001 certified?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.023	Does the firm adhere to a Code of Ethics/Code of Conduct? If so please provide a copy to us.	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.024	If yes, how is the code monitored - internally or externally?		
2.025	Will records belonging to our organization be stored at multiple locations? Refer to Fact Sheet.	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.026	If yes, in which facilities will our records be stored?		
2.027	For specified facility(s), what is your total capacity in cubic feet?		
2.028	For this facility(s), what is your current unused capacity (in cubic feet)?		
2.029	For specified facilities, at the current or anticipated rate of growth, when do you expect to meet capacity?		
2.030	Describe your quality assurance processes.		
2.031	Please provide attrition statistics for staff, supervisory, and management personnel.		
2.032	If yes, please list all subcontractors and what services they provide.		
2.033	Does your company have union employees?	<input type="checkbox"/> yes	<input type="checkbox"/> no
2.034	If yes, what union(s)?		
2.035	If yes, what union(s)?		
2.036	When does the current union contract expire?		

2.037	When does the current union contract expire?	
2.038	In the past five years what capital improvements have you made?	
2.039	Does your policy for your records facility?	
2.040	Does your company "Re-Pack" Records boxes? If so what? is the total cost box included? If not what do you do with a box that is not acceptable for your records facility?	
2.041	Is there financial assistance available to TS to help pay current vendors permanent out charges? If so what?	

### Section 3.0 – Off-Site Storage Specifications

3.001	What is the address of the facility (street and facility)? "O" = Owned, "L" = Leased	
3.002	Does the facility have a vault? "MV" = media vault, "PV" = private vault	
3.003	What is the building structure? "P" = Pre-engineered steel, "T" = Tilt up (concrete), "B" = Brick/block	
3.004	What is the total size of your facility in square footage and cubic footage capacity?	
3.005	How many floors?	
3.006	Clear ceiling height(s)?	
3.007	Age of facility in years?	
3.008	Age of roof in years?	
3.009	Is the roof flat with internal drains?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.010	If yes, insert "R" = rubber or "B" = Built up bituminous tar and pitch	
3.011	Is the roof pitched with external drains?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.012	If yes, is it a standing seam roof?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.013	If not, attach detailed description of the roof referencing this section and line item.	
3.014	What type of heating system is used? Insert "G" = Gas, "E" = Electric, "P" = Propane, "O" = Oil	
3.015	What type of heating equipment is in each facility? Insert "U" = Unit space heaters, "AR" = Air rotation, "T" = Through the wall, "R" = Radiant	
3.016	Number of heating units?	
3.017	Is/Are the heating unit(s) separated from the storage area by a firewall?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.018	Is the rack configuration built for, "CW" = catwalk or "OP" = order picker.	
3.019	If catwalk, how many levels?	
3.020	If order picker, how many feet high is the rack?	
3.021	Does the rack and shelving configuration meet all local and federal codes?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.022	Is the facility in a 500 year or less flood plain?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.023	If yes, attach details referencing this section and line item.	
3.024	Does the facility have limited street access, one way in and one	<input type="checkbox"/> Yes <input type="checkbox"/> No

	way out?		
3.025	If yes, attach details referencing this section and line item.		
3.026	Are there any hazardous storage, manufacturing, transportation, or processing facilities within one-quarter mile of any storage facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.027	Is dock area separate from the storage area?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.028	Are trucks parked inside building or outside building at night?	<input type="checkbox"/> Inside	<input type="checkbox"/> Outside
3.029	Are there any boxes in the trucks overnight?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Fire Protection and Prevention

***What are the optimal requirements for storage integrity and physical safety? Safety in this context applies to the records and not to the safety of personnel. While off-site storage facilities can and should provide for the physical safety of the records stored within their facilities, it is still the responsibility of the owners of those records to ensure that the records are insured (See 5.0 RFQ Insurance) in some form and that a plan is in place for disaster recovery.***

3.030	Does the facility have city water?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.031	If yes, are there an adequate number of fire hydrants?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.032	If yes, are their locations in compliance with all applicable codes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.033	Is the facility equipped with a sprinkler system designed for the purpose?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.034	If yes, attach an inspection report from a registered fire safety or hydraulics engineer providing details of the system clearly indicating compliance with and/or deviation from all applicable local, state and federal fire codes including but not limited to NFPA. It should include the type of system, i.e. ESFR, in rack details, wet or dry, design densities etc.		
3.035	If the system is dry is there a generator backing up the compressor?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.036	Are the exterior wheel valves chained and locked in an open position?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.037	If yes, is the key in an easy to find convenient location?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.038	Are all employees trained to respond to an accidental discharge of the system?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.039	Are the exterior wheel valves equipped with tamper switches monitored by the alarm company?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.040	How often (in months) is the fire alarm system flow tested by a certified independent contractor?		
3.041	Is the facility equipped with smoke detectors?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.042	If yes, have you experienced false alarms?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.043	Is there a Knox Box present?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.044	If yes, does it contain a drawing showing mechanical equipment and other critical needs locations?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.045	If yes, does it contain key(s) to access all critical locations in the facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.046	Do paths of egress meet all applicable codes for maximum distance to an exit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.047	Are paths of egress clear and open?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

3.048	Are fire extinguishers located in all required locations?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.049	Do all fire extinguishers have current inspection tags?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.050	Is propane stored in or adjacent to the facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.051	If yes, is it stored in an approved locked enclosure/location?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.052	Is gasoline stored in the facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.053	If yes, is it stored in an approved locked enclosure/location?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.054	Does the rack shelving material meet all applicable codes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.055	Have you had any fires?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.056	Is there a contingency solution in place if the facility loses external water?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.057	Is there a contingency solution in place if the facility loses electricity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.058	Do any adjacent businesses pose a special fire or hazardous materials threat?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.059	If yes, do response teams and facility personnel have contingency plans for this unique threat?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.060	What kinds of businesses occupy adjoining buildings?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.061	Are there any adjacent businesses that handle or manufacture hazardous materials?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.062	Do employees know how to suppress fires for the materials retained in your facility in order to minimize damage to records?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.063	How often are these procedures tested?		
3.064	Are these tests documented?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.065	Do you allow employees to smoke in the warehouse?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Security and Alarms

***The procedures, systems and equipment used to prevent unauthorized access and breeches of security by both employees and outside forces to the stored or transported records /media.***

3.066	Are visitors required to sign in?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.067	Please provide an explanation of your procedure for visitor identification.		
3.068	Please describe procedures for checking visitors into facility or touring facility.		
3.069	What security procedures are in place for authorizing visitor access?		
3.070	Is visitor identification required before entry is permitted?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.071	Are visitor badges issued?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.072	Are all visitors escorted by a designated employee at all times?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.073	Are visitors escorted in office areas at all times?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.074	Are visitors allowed into storage facilities?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.075	If so, under what circumstances?		
3.076	If so, are they escorted at all times?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.077	What is your policy or practice if you do not have designated persons for delivery?		
3.078	If yes, do you require signatures for delivery?	<input type="checkbox"/> Yes	<input type="checkbox"/> No



3.079	Are records tracked at all times from pick up to delivery?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.080	Do you comply with all HIPAA security/confidentiality requirements?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.081	Do you comply with GLBA (Gramm-Leach-Bliley Act) requirements or other similar requirements?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.082	Does the facility utilize some form of pass code restricting entry to records within each account?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.083	Do delivery personnel wear uniforms?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.084	Do all employees wear pictorial ID Tags?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.085	How many employees are there in the facility?		
3.086	Are background checks required for employees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.087	What types and level of security screening do you conduct on employees and new hires?		
3.088	Does your security screening include validation of an employee's Drivers License?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.089	Do you conduct random drug testing?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.090	Please describe new employee training on emergency procedures.		
3.091	Please describe new employee training on emergency procedures.		
3.092	Do you employ temporary employees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.093	Are all temporary employees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.094	Is a security check completed on all employees? If so what constitutes a security check?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.095	How is authorized access insured through points of entry?		
3.096	Are loading docks protected by double doors to prevent unauthorized access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.097	Are alarm systems in place on all possible points of entry?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.098	Is the security system monitored 24 hours a day?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.099			
3.100	Who responds to security system alarms; a security service, police, or both?		
3.101	What is the response time when the security system is activated?		
3.102	What is the type of security system in use?		
3.103	Please describe the type of security system in use.		
3.104	What kinds of businesses occupy any adjoining buildings?		
3.105	Does the facility have motion detectors inside the records storage areas?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.106	What is the protocol for access to controlled areas?		
3.107	Does the facility obtain written permission before mentioning its clients in marketing materials or discussions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.108	Does the vendor provide remote database access through the internet?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.109	If yes, attach details regarding the fire wall and method of access?		
3.110	Is there a closed circuit TV system in place?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.111	If yes, is it date and time stamped?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

3.112	If yes, attach details explaining the storage schedule prior to reuse and the security of the storage location?		
3.113	Is there an armed guard on the premises?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.114	If so, at what times?		
3.115	Is there telephone, electronic systems and security system safeguards and data back-ups in place?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.116	Is the alarm system backed up? If so, how?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.117		<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.118		<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.119	If yes, is it departmental specific?		
3.120			
3.121	Are these tests documented?		

## Technology Support

**Technology and Software support provide tools for access to data in order to manage offsite records.**

3.122	Does the vendor's facility use a barcode system that assigns unique numbers? Can the vendor accommodate customer assigned bar codes? Are the labels supplied? At what cost?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.123	What software system and version is in use?		
3.124	Are there any plans for future changes or upgrades?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.125	If yes, please describe.		
3.126	Is global/multi-location database access available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.127	Is there a daily backup stored offsite?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.128	Is an Uninterruptible Power Supply (UPS) and power backup Generator for the computer system?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.129	Are indexing and data entry services available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.130	Are printed reports available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.131	Is a complete inventory available on request?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.132	If yes, indicate all alternative forms in which reports are available? "P" = Printed, "CD" = CD, "EM" = E-mail and "O" = Online		
3.133	If not, in what form is the inventory available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.134	Are requests for service accepted by "P" = phone, "F" = fax, "W" = web and "EM" e-mail.		
3.135	Are items being delivered scanned by the driver at the point of delivery at "B" = Box, "F" = File and/or "D" = Document level?		
3.136	Are items being picked up scanned by the driver at the point of pickup at "B" = Box, "F" = File and/or "D" = Document level?		
3.137	Is a printed receipt of scanned items provided by driver?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Invoicing

**Invoicing should be customized to your needs.**

3.138	Is a departmental invoicing available online?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.139	Is a corporate summary invoice available online?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.140	Are work orders/service requests/job order summaries available on line?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.141	Are individual line items summarized with cross references to work order/job number?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.142	Is electronic invoicing available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.143	Is electronic payment available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.144	Is a single invoice for all services for multiple locations (i.e. Hard Copy, Destruction, Enterprise Billing and Vault) with services broken down also by location available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.145	Attach examples of available invoice configurations.		

### Online Features

3.146	If on-line descriptive features are available, what is the level of detail and who controls the function? (B=box)	
3.147	Box descriptive information?	
3.148	What level can the firm communicate with the vendor via CA Records (File Surf) If So What Tasks??	
3.149	Data Entry?	
3.150	Data Entry?	
3.151	Edits of descriptive information?	
3.152	Destruction Retrieval requests?	
3.153	Withdrawal / Refile requests?	
3.154	Destruction Services requests?	
3.155	Permanent withdrawal requests?	
3.156	How many fields are available?	
3.157	"Key word" searches?	
3.158	"Contains in" searches?	
3.159	Boolean logic searches?	
3.160	Is online help available?	

### Reports Online

3.161	Can the firm via its own RM software do its own on line reporting?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.162	If yes, is a report writer function available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.163	Are the following reports available online?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.164	Proof listing of data entry for new adds or requested changes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.165	List of items in circulation including Requester name and last activity date?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.166	List of items scheduled for destruction review?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.167	Certificate of destruction including all descriptive fields?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.168	Permanent withdrawals including all descriptive fields?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Security for Online Client Access

3.169	Does the system require a user password?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.170	Does the client have access to system administration functions in order to activate or deactivate employee security access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.171	Are passwords able to be reused?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.172	Does system require periodic changes of password?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.173	Is individual user access restricted by function? (i.e. data entry,	<input type="checkbox"/> Yes	<input type="checkbox"/> No

	edit, retrieve, etc.)		
3.174	Is web access through Secured Socket Layers (SSL)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.175	Can access be restricted by "C" = Cost Center(s)/Dept(s), "T" = Time Day, "D" = Domain Name, and/or "P" = IP Address?		
3.176	Does the software require a user name and pass code for phone and fax orders?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Transportation

***Transportation involves delivery vehicles, safety, and systems used to pick-up and deliver items to and from storage facilities.***

3.177	How many delivery vehicles are there?		
3.178	What is the largest Gross Vehicle Weight (GVW)?		
3.179	What is the smallest GVW?		
3.180	What is the average age of the delivery vehicles?		
3.181	Is the condition of the vehicles "E" = Excellent, "G" = Good, "A" = Average and "P" = Poor?		
3.182	How are vehicles equipped to accommodate extreme weather conditions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.183	Are vehicles considered 'no smoking' zones?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.184	Are vehicles equipped with fire extinguishers?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.185	Are vehicles equipped with intrusion alarms?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.186	Are vehicles equipped with 2-way communication?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.187	Are vehicles equipped with global positioning system (GPS) tracking?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.188	If yes, are staff at base facility trained to use this equipment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.189	Are the cargo areas in vehicles air- conditioned (temperature controlled to protect sensitive media)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.190	Are media cases available for protection from shock and moisture?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.191	Are driver's skills tested and certified?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.192	Are licenses checked annually for violations and validity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.193	Does a DUI automatically disqualify a driver?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.194	Are vehicles inspected daily?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.195	Is a daily maintenance log kept?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.196	Are the cargo areas of vehicles equipped with an automatic fire suppression system, i.e. Halon?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.197	Are vehicles equipped with power tailgates?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.198	Is there a pre-employment drug and alcohol testing program?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.199	Does the facility conduct material handling equipment safety training programs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.200	Are driver safety training programs in place?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.201	If conveying secret, confidential, or valuable items, have the crew been taught 'defensive' driving techniques?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.202	Is a third party transportation service ever used?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.203	If yes, attach details including who, why, how often, terms and		

	conditions etc.		
3.204	Do vehicle door locks, including cargo area, automatically lock as soon as the key is removed or inside button released?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.205	How frequently are drivers drug tested?		
3.206	Do drivers receive corporate policy/orientation training? I.e. Confidentiality, safety, security, etc.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.207	Are vehicles equipped with cargo door alarms to prevent moving vehicle with cargo door open?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.208	Are vehicles locked and alarmed when parked?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.209	Does records storage vendor provide transportation services for other companies or industries?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.210	If yes, attach details including who, what and why?		
3.211	If yes, are non records/ media ever transported at the same time in the same vehicle as items that come from another industry?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.212	Provide the following delivery schedule costs for Normal work hours, nonworking hours, rush and holidays/weekends?		
3.213	Is a lower cost service available at different times?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.214	If yes, attach (or insert) detail of times and costs. If attached, reference this section and line item.		
3.215	Does vendor provide emergency delivery service?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.216	If yes, designate time and related cost, working hours' time cost, nonworking hrs, holiday/weekend?		
3.217	Are pick ups and deliveries made at the same time?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.218	Do you allow employees to smoke in or around the trucks?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.219	Are items retrievable in transit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.220	Can driver be notified in transit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.221	Is a copy of the full client database available during and/or upon closure of the agreement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.222	Is a copy of the full client database available during and/or upon closure of the agreement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.223	If not, attach details of same referencing this section and line item explaining why not.		
<b>Growth and Expansion</b>			

3.224	Describe your plan when moving records from one facility to another?		
3.225	Describe your long term plans for expansion and growth to increase the capacity of existing storage facilities.		

## Section 4.0 - Pricing & Agreements

Consider long term contracts with less stringent delivery requirements and higher fees for emergency services could be more economical... Cost versus service must be considered.

### Invoicing and Billing

Please provide a sample bill, statement and Invoice.

4.001	What is the billing frequency? INSERT: (S) = Semiannual, (A) = Annual, (M) = Monthly, (W) = Weekly, (Q) = Quarterly		
4.002	Do invoices provide subtotals for storage & service costs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.003	Are separate invoices available by department, groups of departments, business units, etc?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.004	Is an enterprise account/billing available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.005	What is the minimum agreement term? (1) one year, (2) two year, etc.		
4.006	What is the maximum agreement term? (1) one year, (2) two year, etc.		
4.007	Is there an automatic renewal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.008	If yes, for what term? (1) one year, (2) two year, etc.		
4.009	If yes, attach details of same referencing this section and line item.		
4.010	Are there performance metrics in the contracts?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.011	If yes, attach details of same referencing this section and line item.		
4.012	If yes, do the metrics allow for termination in the event of non-performance?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.013	Is there a permanent removal fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.014	Does the agreement include a "high water mark" or a minimum percentage of the original month's storage fees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.015	Are contract based incentives for price reductions available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.016	Are volume discounts available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.017	For what period of time are the storage fees fixed? 1 year 2 years, etc.		
4.018	For what period of time are the service fees fixed? 1 year, 2 years, etc.		
4.019	How many months in advance of a price adjustment is the client notified?		

## Storage

4.020	Are storage fees charged by: (IB) item/box or (CF) cubic foot?		
4.021	If CF, attach a list of each box/item type showing the cubic foot equivalent -- referencing this section and line item.		
4.022	Are storage fees charged for items in circulation until they are returned?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.023	Once items are authorized for destruction, when do the charges for the records cease?		
4.024	Is there a minimum storage charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Retrieval and File Services

4.025	Do you provide for emergency and/or after hour and holiday retrieval requests?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.026	Define rush - may be service levels of 2hr, 4hr, etc.		
4.027	Can documents be reviewed at the storage facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.028	Does this cost include the retrieval?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.029	Does this cost include the refile?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.030	If not, does the retrieval?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.031	Does this include the refile?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.032	If not, does the standard retrieval, refile cost apply?	<input type="checkbox"/> Yes	<input type="checkbox"/> No





### Transportation: Pick Up & Delivery Fees

4.033	Does the rate include items picked up and delivered?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.034	What is the maximum number of items included in this base rate?		
4.035	Is there an extra stop charge for multiple delivery location in the same building or campus?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.036	Is there a second transportation charge, requiring another vehicle, if the first truck is full?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.037	Are there additional zone or distance based charges for delivery outside the base zone or quoted rate above?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.038	Is there a dock usage fee associated with pickups made by the client?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.039	Is there a dispatch fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.040	Are deliveries available after normal business hours, weekends, holidays?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.041	Is there an after-hours, holiday, weekend surcharge for transportation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.042	Is there a surcharge for onsite driver scan verification and printed receipt ticket?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Data Entry, New Adds (Accession)

4.043	Are new adds charged by: INSERT IB - Item Box or CF = Cubic Foot?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.044	Is the cost of box level data entry included in the new add charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.045	If no, what is the box level data entry charge? (Assume a transmittal form is provided by the client.)	\$	
4.046	What is the charge per file for file level data entry? (Assume a transmittal form is provided by the client.)	\$	
4.047	Is there a separate charge for bar code labeling the box, file or document?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.048	Are data conversion services or data import features available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.049	Are there any other charges associated with data entry?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.050	If so, describe		

### Online Web Service Costs

4.051	Are there IT support or help desk charges when using the online access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.052	Are there additional charges to download reports?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.053	Are there other fees associated with online database access?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

## Permanent Withdrawal & Termination

### Termination

4.054	Is there a permanent removal fee associated with an account closing?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.055	If yes, is the charge greater than the standard retrieval fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.056	If the contract is terminated, will you provide transportation services to the new vendor at no charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.057	Are there any other termination-related costs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.058	If so, describe		
4.059	Are there a maximum number of items per week that can be retrieved for termination?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.060	If, as a result of a records storage center merger, acquisition, or divestiture, can the client terminate the agreement (contract) at any time?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.061	Will the client be allowed to terminate the agreement at any time and move all material to another facility at no cost to the client?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Permanent Withdrawal

4.062	Is there a permanent removal fee in addition to the standard retrieval fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.063	Are there a maximum number of items per week that can be retrieved for permanent removal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.064	Is a Permanent Removal Fees Charged upon termination of the contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.065	Is there a pallet cost for large quantities of permanent withdrawals?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

### Destruction

4.066	Does the destruction vendor provide both recycling and confidential destruction services?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.067	Is destruction performed by a third-party vendor?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.068	Is pulverized destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.069	Is shredding destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.070	Is dual or cross cut shredding available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.071	Is onsite destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.072	Are there charges for destruction notification reports?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.073	Are there charges for destruction certificates?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.074	Is pulling an item for destruction considered a permanent withdrawal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.075	Are destruction bins available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.076	Is there a charge for providing the bins?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.077	Are there different fees for archival vs. rotational items/tapes?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.078	Are there any management fees in addition to the storage, rotation and transportation charges?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.079	Is there a minimum storage fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.080	Do the same prices for transportation as noted in the Retrieval/Refile/Transportation Section apply?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.081	Are monthly storage fees based on: P = Peak number in past 30 days; AC = Actual count at end of month; AS = Allocated Slots or positions; O = Other Indicate All That Apply		
4.082	Are transportation fees per delivery/pickup (DP) or a flat monthly fee (FM)?		
4.083	Is there an extra charge to scan/verify transactions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.084	Can audit, disaster, withdraw and deposit lists be transmitted electronically to the vendor?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.085	If yes, is the vendor software able to compare the scan audit of each rotation against the electronic withdrawal/deposit lists producing exception/error trapping reports?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.086	If yes, attach details referencing this section and line item.		

### Miscellaneous

4.089	Does the vendor agree that all information contained within this check list may be used by the client as part of the agreement between vendor and client?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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## 5.0 Contract and Cost

Please provide a copy of your insurance coverage

### RFQ Insurance

5.001	Is WLL (Warehouseman's Legal Liability) coverage in place?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.002	If yes, What is the base WLL coverage per stored cu ft of paper?		
5.003	What is the base WLL coverage per stored tape or unit of electronic media?		
5.004	Is additional WLL insurance coverage available through your contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.005	If yes, attach details.		
5.006	Is General Liability coverage in place up to 1 Million dollars per occurrence and 1 Million dollars in aggregate?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.007	What is your combined single limit liability for a transportation loss occurrence?		
5.008	What is your Workers Compensation coverage per occurrence/accident?		
5.009	Do you have additional Umbrella coverage in addition to primary coverage?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.010	If yes, what is the maximum coverage per individual occurrence?		
5.011	If yes, what is the maximum coverage per aggregate incidents?		
5.012	Is your property insurance coverage based on a minimum of 80% of the replacement cost of buildings and contents for each facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.013	Do you have Business Interruption Coverage in the event of a disaster?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.014	If yes, is document restoration coverage available under your contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.015	If you are the successful bidder, will you provide a copy of your policy for review?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.016	Will you provide a certificate of insurance?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.017	What is the maximum coverage for damaged items? Attach a table to specify level and type of item. Also, Reference this section and line item.		
5.018	If a third party courier service is used does your WLL coverage apply?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.019	If not, attach details explaining how equal or greater coverage is guaranteed. Reference this section and line item.		
5.020	Are Temporary Employees covered by your insurance policies?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.021	If not, attach details explaining how equal or greater coverage is guaranteed. Reference this section and line item.		
5.022	Are Contractor Employees covered by your insurance policies?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.023	If not, attach details explaining how equal or greater coverage		

	is guaranteed. Reference this section and line item.		
5.024	In the event of a fire etc, who would pay recovery costs?		
5.025	What is the billing frequency? INSERT: (S) = Semiannual, (A) = Annual, (M) = Monthly, (W) = Weekly, (Q) = Quarterly		
5.026	What are the payment terms? INSERT: (30N) = 30 days net (1%) = 1% 10 days		
5.027	Do invoices provide subtotals for storage & service costs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.028	Are separate invoices available by department, groups of departments, business units, etc?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.029	If Yes, at what cost?	\$	
5.030	Is a corporate summary available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.031	If Yes, at what cost?	\$	
5.032	What is the minimum agreement term? INSERT: (1) one year, (2) two year, etc.		
5.033	What is the maximum agreement term? INSERT: (1) one year, (2) two year, etc.		
5.034	Is there an automatic renewal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.035	If yes, for what term? INSERT: (1) one year, (2) two year, etc.		
5.036	Is there an automatic cost increase?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.037	If yes, attach details of same referencing this section and line item.		
5.038	If yes, do the metrics allow for termination in the event of non-performance?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.039	Is there a permanent removal fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.040	Does the agreement include a "high water mark" or a minimum percentage of the original month's storage fees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.041	Are contract based incentives for price reductions available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.042	If yes, attach details of same referencing this section and line item.		
5.043	Are volume discounts available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.044	If yes, attach details of same referencing this section and line item.		
5.045	For what period of time are the storage fees fixed? INSERT: 1 = one year 2 = two years, etc.		
5.046	For what period of time are the service fees fixed? INSERT: 1 = one year 2 = two years, etc.		
5.047	How many months in advance of a price adjustment is the client notified?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.048	Are items tracked and retrievable while held in processing area prior to placement in facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.049	Is a copy of the full client database available during and/or upon closure of the agreement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.050	If yes, at what cost?	\$	
5.051	If not, attach details of same referencing this section and line item explaining why not.		

## Storage

5.052	Are storage fees charged by: INSERT (IB) item/box or (CF) cubic foot?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.053	If CF, what is the monthly cost per cubic foot?	\$	
5.054	If CF, attach a list of each box/item type showing the cubic foot equivalent -- referencing this section and line item.		
5.055	If IB, what is the monthly cost for a standard 15" x 12" x 10" box?	\$	
5.056	If IB, attach a list of each item/box showing the monthly cost for each item - referencing this section and line item.		
5.057	Are storage fees charged for items in circulation until they are returned?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.058	Once items are authorized for destruction, do storage charges stop in 30 days or less?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.059	Is there a minimum storage charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.060	If yes, attach details referencing this section and line item.		

## Retrieval, Refile, and Transportation Services

**Please define the following terms: STANDARD, PRIORITY, RUSH**

5.061	Is a retrieval/refile charge based on: INSERT (IB) item/box or (CF) cubic foot?			
5.062	Retrievals/refiles via phone, fax or E-mail:	<b>STD</b>	<b>PRI</b>	<b>Rush</b>
5.063	Cost to retrieve a box			
5.064	Cost to retrieve a file			
5.065	Cost to retrieve a document			
5.066	Cost to refile a box			
5.067	Cost to refile a file			
5.068	e-mail charge			
5.069	Telephone Charge			
5.070	Scanning Charge			
5.071	Fax Charge			
5.072	Return/ Refile Charge			
5.073	Other? Attach an explanation or table referencing this section and line item.			

## Retrievals/Refiles Online

5.074	Cost to retrieve a box			
5.075	Cost to retrieve a file			
5.076	Cost to retrieve a document			
5.077	Cost to refile a box			

5.078	Cost to refile a file			
5.079	Cost to refile a document			
5.080	Is contact information provided for emergency and/or after hour and holiday retrieval requests?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.081	Define rush - may be service levels of 2hr, 4hr, etc.			
5.082	If yes, what is the surcharge?	\$		
5.083	Are deliveries available outside of normal hours?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.084	If yes, what is the surcharge?	\$		
5.085	Can documents be reviewed at the storage facility?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.086	Is there a private space available for this purpose?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.087	If so what is the charge?			
5.088	Is there an after normal hours/holiday/weekend surcharge for retrievals?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.089	If yes, what is the surcharge?	\$		

### Transportation Pick-up/Delivery Fees

5.090	See description of standard, priority and rush above.	STD	PRI	RUSH
5.091	Base delivery rate			
5.092	Does the rate include items picked up and delivered?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.093	What is the maximum number of items included in this base rate?			
5.094	Cost per (Insert) IB = Item Box CF = Cubic Foot in excess of this number?			
5.095	Is the maximum number included in the base rate above calculated using the total number of items picked up, delivered or combined or both? INSERT: I = Individual by Item T = Total			
5.096	Is there an extra stop charge for multiple delivery location in the same building or campus?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.097	If yes, at what charge?	\$		
5.098	Is there a second transportation, requiring another vehicle, if the first truck is full?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.099	Are there additional zone or distance based charges for delivery outside the base zone or quoted rate above?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.100	If yes, what are the related costs and attach details referencing this section and line item.	\$		
5.101	Is there a dock usage fee associated with pickups made by the client?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.102	If yes, at what charge?	\$		
5.103	Is there a dispatch fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.104	If yes, at what cost?	\$		
5.105	Is there an after-hours, holiday, weekend surcharge for transportation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.106	If yes, what is the surcharge?	\$		
5.107	Is there a surcharge for onsite driver scan verification and printed receipt ticket?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.108	If yes, attach details referencing this section and line item.			



### Data Entry/ New Adds (Accession)

5.109	Are new adds charged by: INSERT IB - Item Box or CF = Cubic Foot?			
5.110	If there are any additional fees attach a table referencing this question by item number.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.111	Do you charge an intake fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.112	Is the cost of box level data entry included in the new add charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.113	If no, what is the box level data entry charge? (Assume a transmittal form is provided by the client.)	\$		
5.114	What is the charge per file for file level data entry? (Assume a transmittal form is provided by the client.)	\$		
5.115	Is there a separate charge for bar code labeling the box, file or document?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.116	Are data conversions or data import features available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.117	If yes, what are the IT hourly service charges?	\$		
5.118	Are there any other charges associated with data entry?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.119	If yes, attach details referencing this section and line item.			
5.120	Designate which of the following functions are available online and the respective charges if available.	<b>STD</b>	<b>PRI</b>	<b>RUSH</b>
5.121	Search and query			
5.122	Retrieval – box			
5.123	Refile – box			
5.124	New adds			
5.125	Data entry			
5.126	Edits			
5.127	Refile – document			
5.128	New adds			
5.129	Data entry			
5.130	Edits			
5.131	Complete inventory			
5.132	Box folder inventory			
5.133	Report writes			
5.134	Can client \add or delete items from this list based upon need?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
		<b>COST</b>	<b>YES</b>	<b>NO</b>
5.135	Is there an IT support or help desk charge when using the online access?			
5.136	If yes, at what hourly rate?	\$		
5.137	If yes, is there a minimum charge?			
5.138	Are there additional charges to download any of these or other reports?			
5.139	If yes, attach details referencing this section and line item.			

5.140	Are there other fees associated with online database access?			
5.141	If yes, attach details referencing this section and line item.			
		<b>COST</b>	<b>PRINT</b>	<b>ELECT.</b>
5.142	Designate the availability and respective charges for each of the following:			
5.143	Single specific search and query parameters			
5.144	Destruction notifications			
5.145	Proof listing of data entry			
5.146	Retention scheduling tables			
5.147	File folder inventory			
5.148	Box inventory			
5.149	Document inventory			
5.150	Proof listing of edits			
5.151	Destruction certificate			
5.152	Items in circulation			

### Permanent Withdrawal and Termination

### Termination

		<b>COST</b>	<b>YES</b>	<b>NO</b>
5.153	Is there a permanent removal fee associated with an account closing?			
5.154	If yes, is the charge greater than the standard retrieval fee?			
5.155	Are these charges negotiable?			
5.156	If yes, indicate charges per (Circle One) IB = Item Box CU = Cu. Ft.	\$		
5.157	The charge for a printed copy of the database at termination of the contract?	\$		
5.158	The charge for an electronic comma delimited ASCII file copy of the database?	\$		
5.159	If the contract is terminated, will you provide transportation services to the new vendor at no charge?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.160	Are there any other termination-related costs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.161	If yes, attach details referencing this section and line item.			
5.162	Are there a maximum number of items per week that can be retrieved for termination?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.163	If yes, what is the rate per week?			

Permanent Withdrawal			
5.164	Is there a permanent removal fee in addition to the standard retrieval fee?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.165	Are there a maximum number of items per week that can be retrieved for permanent removal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.166	Is a Permanent Removal Fee Charged upon termination of the contract?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.167	Is there a pallet cost for large quantities of permanent withdrawals?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
5.168	Please provide a table with a breakdown of all fees and charges. Attach With Reference to this question by item number.		

Destruction			
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		COST	YES	NO
5.169	Does the destruction vendor provide both recycling and confidential destruction services?			
5.170	Is destruction performed by a third-party vendor?			
5.171	Is pulverized destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.172	If yes, at what cost per pound?	\$		
5.173	Is shredding destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.174	If yes, at what cost per pound?	\$		
5.175	Is dual or cross cut shredding available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.176	If yes, at what cost per pound?	\$		
5.177	Is onsite destruction available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.178	If yes, at what cost?	\$		
5.179	Are there charges for destruction notification reports?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.180	If yes, at what cost?	\$		
5.181	Are there charges for destruction certificates?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.182	If yes, at what cost?	\$		
5.183	Is pulling an item for destruction considered a permanent withdrawal?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.184	Are destruction bins available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.185	Is there a charge for providing the bins?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
5.186	If yes, at what monthly charge?	\$		

## Section 6.0

### Terms and Conditions Used in Contracts

#### Exit Fees

There are primarily two types of exit fees that may be associated with the storage of records. One is related to the permanent removal of items from the facility; the other is related to records abandoned by the client.

##### *Permanent Removal Fees*

A charge levied by some, though not all, commercial records centers if a client has decided to transfer its records to a different storage provider. The fees typically cover identifying and pulling boxes from their storage location, preparing the boxes for the transfer, and deleting data from the old storage provider's computer systems. Items included in this fee may vary from vendor to vendor. Clients are advised to seek an itemization of specific tasks included in the permanent removal fee. The itemization should become a part of any negotiated contract or related contract addendum.

##### *Abandoned Records*

Another form of exit fees relates to material owned by a client who has stopped paying for storage. Although due diligence is generally exercised by the vendor to avoid these situations, various circumstances can lead to records being abandoned. An organization may go out of business, or perhaps a company has forgotten to notify the new owners that records are stored off-site after a merger or acquisition has taken place. Or, perhaps the organization is in financial difficulty and can not pay their bills.

What rights and/or obligations does a storage vendor have in such a situation? Who "owns" the records? Does the storage provider have the right to claim ownership if a client defaults on their contractual obligations? Can the provider attempt to sell records to recover current or past charges? What are their obligations to protect individual privacy in the case of medical or financial records? Does the state in which your records are stored have any laws or statutes regarding the protection and privacy of records?

Some storage providers may elect to exercise rights to claim ownership and invoke the Warehouseman's Lien language under UCC, Article 7, Sub-Sections 204-210. (See the following discussion on the Uniform Commercial Code). For the storage provider, their claim to ownership under this clause may obligate them to protect individual privacy. (States vary in the obligations and privileges they allow when the Warehouseman's Lien is exercised.) Clients should be aware that if they default on a contractual obligation, a storage provider may elect to claim ownership of their records. Yet, the client may be held liable for violating legitimate medical, financial, legal and records obligations.

During the contract negotiations, prospective clients should understand what position the providers under consideration choose to take in regarding this issue. If both parties to the agreement abide by their obligations, this extreme action can generally be avoided. However, it is important to enlist the services of an attorney who is knowledgeable regarding commercial transactions and applicable state and federal laws when this issue is under negotiation

#### Uniform Commercial Code

The Uniform Commercial Code (UCC) Article 7: Warehouse Receipts, Bills of Lading and other Documents of Title, governs the commercial storage industry. While the UCC is developed by the National Conference of Commissioners on Uniform State Laws (NCCUSL), the articles are recommended language, until adopted by each state. Although the NCCUSL recommends that each state adopt the model law as drafted, each state has the option to adopt all or part of the law. For example, Section 7-204 identifies the duty of care and contractual limitations of a warehouseman's liability. The note to § 7-204 allows for the insertion of a subsection "to reference any statute which imposes a higher responsibility upon the warehouseman or invalidates the contractual limitations which would be permissible under this Article". Therefore, it is important to research the language of the UCC adopted by each state in which a company does business to ensure compliance with that law.

The UCC specifically acknowledges that limitations are subject to contractual agreement. Section 1-104 (3) provides: "The effect of provisions of this Act may be varied by agreement, except as otherwise provided in this Act and except that the obligations of good faith, diligence, reasonableness and care prescribed by this Act may not be disclaimed by agreement but the parties may by agreement determine the standards by which the performance of such obligations is to be measured if such standards are not manifestly unreasonable".

It is important to identify successor ownership of records and payment responsibility in the event of a change with the original contracting party; such as a merger, business dissolution, or bankruptcy. This is to ensure that the records center is not burdened with records that have no owner and there is an entity or person identified with an acknowledged legal responsibility for payment of storage fees.

### **Quality Assurance**

For a complete understanding of the process and intentions behind Quality Assurance, refer to the Interpretive Guidelines in ISO 9001:2000 1 which includes complete model for continuous improvement. This guideline document also relates to ISO 9000, 9001 and 9004 Standards and Guidelines for Quality Management Systems. Service organizations that qualify for certification have demonstrated a commitment to customer satisfaction.

Adopting a quality management system is a strategic business decision. It will be influenced by a variety of requirements, likely different from one customer's organization to the next. However, particular objectives, specific service and performance criteria can be managed and compliance can be measured with this methodology. Specific requirements should also be designated so they are customized to a particular customer's technical requirements. It should be the customer's option to include or exclude some standardized features in service contracts. Service level agreements are negotiable.

The process of managing the resolution of internal non-conformities and discrepancies should be assigned to a Quality Assurance (QA) Officer with responsibility for identifying specific opportunities for improvement and resolution. Opportunities and resolution should be documented and tracked by the QA Officer.

Procedures for resolution vary, dependant upon the severity of deviation. Typically, they fall within one of the following three categories:

- 1) Defined Operational Variance - Defined processes with pre-identified corrective actions not necessarily recorded, with immediate resolution provided by experienced staff or reference to documentation.
- 2) Operational Non-Conformities - Complex or undefined errors that require extensive effort to resolve, often with assistance from other departments. These are individual errors rather than failures of a process or system. Examples include failure to complete adequate documentation on retrieving or transferring items, variances not resolved after reminders, and missed deadlines.
- 3) Opportunity for Improvement - Problems for potential failure in flow, process, or systems resulting in non-conformities, which require corrective action to avoid re-occurrence. Normally, review and revision of the flow, process or system is required.

Publication Source: DNV Certification - Interpretive Guidelines to ISO 9001:2000, Det Norske Veritas, Houston, TX 77084 (Certification Services)

### **Sarbanes-Oxley**

This document is intended as a discussion of records management implications of Sarbanes-Oxley, not a comprehensive list of records management compliance requirements. The following information should not be relied upon as legal advice. Please consult legal and records management experts before developing and implementing a records management program for your organization. <http://banking.senate.gov/conf/>

### Gramm-Leach-Bliley

The Privacy or Consumer Financial Information Rule of the Gramm-Leach-Bliley (GLB) Act requires that financial institutions take steps to ensure the security and confidentiality of their customers' non-public, personal information. Consumers' heightened concern regarding how financial institutions protect and use their personal information, as well as the hardships caused by "identity theft" has led the federal government to create mandates such as this in order to prevent even the inadvertent disclosure of private information.  
[Http://www.sec.gov/news/press/2003-6.htm](http://www.sec.gov/news/press/2003-6.htm)

### Partial List of Applicable Codes, Standards, and Practices

The list below is a partial list of applicable standards and practices known to members of the task force. They are provided as background information to inform the users of various approaches to the storage and protection of records. Other countries may have national or regional storage guidelines that have been developed by associations, government action or formal standards bodies.

ANSI/ARMA TR-01 2002, *Records Center Operation*, ARMA International: Lenexa, KS; This technical report covers the establishment and operation of a records center either under direct control of an organization or through the use of a commercial records center. This technical report is registered with ANSI.

ANSI/NFPA 232 2000 Edition, *Standard for the Protection of Records*, National Fire Protection Association: Boston, MA; this standard provides requirements for records protection equipment and facilities and records-handling techniques that provide protection from the hazards of fire.

CFR 36 1228: Subpart K

The requirements listed in this legislation apply only to records of the U.S. Federal government. Although they may be of interest to other types of organizations, it should not be assumed that all business records should be stored in similar facilities.

Organization	Reference	Description	Link
ANZ – Archives New Zealand	S2	Code of best practice for storage of government agency records. Applies only to government records.	<a href="http://www.archives.govt.nz/continuum/dls/pdfs/s2-storage-standard.pdf">http://www.archives.govt.nz/continuum/dls/pdfs/s2-storage-standard.pdf</a>
BSI – British Standards	PD 0010: 1997	Principles for good practices for electronic information management. Applies to all British electronic records.	<a href="http://www.bsi-global.com/">http://www.bsi-global.com/</a>
			Portfolio+of+Products+and+Services/Books+Guides/Doc+Management/pd0009.xalter
HMC – British	HMC Standard for	Used by British	<a href="http://www.hmc.gov.uk/">http://www.hmc.gov.uk/</a>

Historical Manuscripts Commission	Records Repositories – (See also BS 5454)	Public Records Office as standard for holding public documents. Applicable to government documents and historical manuscripts and archival materials.	pubs/HMCstandard.pdf
			and
			<a href="http://bsonline.techindex.co.uk/">http://bsonline.techindex.co.uk/</a>
NAA – National Archives of Australia	Successor to BG240	This standard covers all media. Applies only to Commonwealth records.	<a href="http://www.naa.gov.au/recordkeeping/storage/standard.html">http://www.naa.gov.au/recordkeeping/storage/standard.html</a>
	ISBN 0 642 34446 9		
Library and Archives Canada	Bibliography of Standards	Bibliography of standards (by subject) related to archive, library and records preservation.	<a href="http://www.collectionscanada.ca/8/14/index-e.html">http://www.collectionscanada.ca/8/14/index-e.html</a>
NARA Facility Standards	36 CFR 1228 (k) and Related Appendices	This rule governs the minimum standards of facility construction and fire protection. Applicable only to United States Federal records.	<a href="http://www.archives.gov/about_us/regulations/part_1228_k.html">http://www.archives.gov/about_us/regulations/part_1228_k.html</a>
New South Wales Storage Standard	Standard No. 3	This standard identifies best practices for the storage of state records. Applicable only to NSW public office records – not archival records or electronic records on hard drives.	<a href="http://www.records.nsw.gov.au/publicsector/rk/storage/toc.htm">http://www.records.nsw.gov.au/publicsector/rk/storage/toc.htm</a>

## Glossary

**3570-** High density data tape used for storage.

**Abandoned Records** - As distinct from separation of service (permanent removal fees), another form of exit fees related to the material stored by a commercial service provider for a client no longer able to pay for storage. Due diligence should be exercised by the vendor to monitor their clients in an attempt to avoid these situations.

**Auto Insurance** - Covers accidents involving vehicles including injury, property damage, vehicle damage, vehicle theft and other vehicle related losses.

**Auxiliary Services** - Services in addition to records storage services such as barcode labels, cartons, records management services.

**Bonds** - Employers provides coverage for vendor employees.

**Boolean Logic** - A method of inquiry used in information retrieval systems that use the logical operators *and, or, not, except, if, and then* in a variety of combinations to ensure successful search results.

**Business Continuity** - Plans, processes and procedures that enable a company to resume business operations in the event of a disaster. Includes disaster recovery plans.

**Business Interruption (BI) Insurance** - Covers operating costs and potential losses associated with various forms of business interruption i.e. fire, flood, storm, etc.

**CA** - Certified Archivist

**CD** - Compact Disc

**CDIA** - Certified Document Imaging Architect

**CDL** - Commercial Drivers License

**CF** - Cubic Foot/ Cubic Feet, amount of 3 dimensional space an object occupies. See also Cubic Foot

**Climate Controlled** - Also called Environmental Control. The maintenance of a storage environment for long-term storage or records that includes monitoring the temperature, humidity, light and impurities in the air.

**Commercial Vault** - Climate controlled high security commercial storage facility. This style vault stores magnetic media, long-term or permanent hard copy records and other temperature/humidity sensitive items such as microfiche, microfilm, computer tapes, CD, archival paper, etc.

**CRM (Certified Records Manager)** - A designation from the Institute of Certified Records Managers.

**Cubic Foot** - A measurement of volume of records and archives. A cubic foot is 1,728 cubic inches, or 12 inches high by 12 inches wide by 12 inches deep.



**Disaster Recovery** - Processes, procedures and precautions to enable a company to recover from a disaster, either man-made or natural. Plans that mitigate negative consequences from a disaster.

**Disaster Recovery Plan** - A written and approved course of action to take when disaster strikes ensuring an organization's ability to respond to an interruption in services by restoring the critical business functions. Also referred to as a contingency plan.

**DLT/LTO** - **DLT** (Digital Linear Tape) addresses midrange to high-end tape backup requirements. **LTO** (Linear Tape Open) technology objective is creation of open-format specifications for high capacity, high performance tape storage products for use in midrange and network server computing environments.

**DoD** - Department of Defense, has some specific records storage requirements depending on the classification of the records. Also provides certification process for records-related software.

**DoE** - Department of Energy

**DUI** - Driving Under the Influence (drugs, alcohol, etc.)

**Dunn & Bradstreet** - Business Organization that provides reports and information on the financial soundness of a company. Financial statements may only be available for publicly traded companies. Also includes information on Corporate Family trees.

**Electronic Payment** - Payment made electronically, without the use of checks, credit cards, etc.

**Errors and Omissions (E and O) Insurance** - Provides coverage for errors and/or omissions by vendor employees.

**Exit Fees** - There are two types of exit fees associated with the storage of records under a contract with a third-party provider. One is related to the permanent removal of items stored from the facility and the other is related to records abandoned by a Client.

**FM200** - Fire suppression system used as an alternative to Halon and water, does not deplete ozone in the environment.

**General Liability (GL) Insurance** - Covers accidents on policyholder's premises and/or actions of the company and its employees that might cause harm to another.

**GLBA or GLB** - Gramm-Leach-Bliley Act - Also called the Financial Services Modernization act, which contains provisions for the secure storage of individual's private financial information and notification of this information being shared or sold with other companies/divisions and provides opt out ability for sharing this information.

**GVW** - Gross Vehicle Weight

**Halon** - Compressed gas or steaming liquid, used for fire suppression. Effective only in closed areas. Halon is generally not available to purchase new quantities due to environmental reasons, a third party market is used to purchase Halon.

**HIPAA** - Health Insurance Portability and Accountability Act of 1996 - US mandated standards to protect individual's health record and medical privacy

**IB** - Item/Box a method of calculating costs based on the item or box, not the size

**ISO** - International Organization for Standardization

**ISO9000** - Standards surrounding quality management including meeting customer requirements, regulatory requirements, making continuous performance improvements and providing customer satisfaction.

**Knox Box®** - Rapid entry system, usually used as a part of a disaster recovery/emergency response program.

**MIT** - Master of Information Technology

**NFPA** - National Fire Protection Association

**Permanent Removal** - Removing an item/box permanently from storage. May be removed for destruction, returned to active use, or sent to an alternative storage vendor. Also called Permanent Withdrawal.

**Permanent Removal Fees** - A charge levied by some commercial records centers to prepare records for transfer to a new facility and delete tracking data from its computer system. Items included in this fee may vary from vendor to vendor. Clients encountering this fee are advised to seek an itemization of specific tasks included in the permanent removal fee and to include this itemization in any negotiated contract or related addendum to such negotiated agreement.

**Permanent Withdrawal** - Removing an item/box permanently from storage. May be removed for destruction, returned to active use, or sent to an alternative storage vendor. Also called Permanent Removal.

**Private Vault** - Personal caged or walled compartment. This style vault provides private access and exclusive storage of client items.

**Property Insurance** - Covers loss or damage to buildings and contents owned, boxed or financed, by the policyholder.

**SSL** – Secured Socket Layers, a method of transmitting documents securely over the internet

**UL** - Underwriters Laboratory - a not-for-profit, independent organization that provides product testing and certification.

**Umbrella Insurance** - Provides additional coverage above and beyond the coverage provided under GL and Auto.

**Uniform Commercial Code (UCC)** - Defines contractual responsibilities of parties.

**UPS** - Uninterruptible Power Supply - generally used as backup power for electronic devices and equipment

**Vault** - A security storage area constructed of fire-resistant material and structurally independent from the building in which it is located.

**Warehouseman's Legal Liability (WLL) Insurance** - Covers damage or loss of client owned items in the custody of the policyholder i.e. client records, valuable papers, magnetic media, and other stored items. Note: Insurance riders can be provided to cover restoration expenses associated with water damage to records. Typically ranges from \$1.00 to \$2.00 per cubic foot plus defense and transportation cost. See Footnotes Acts of negligence could open the door for litigation, regardless of the established value. Some insurance companies provide extra coverage for restoration of partially damaged (often wet) records. Customers may be able to secure better, more cost effective coverage through their own corporate insurance provider.

**Warehousing** - Term generally used to describe the storage of hardcopy records in a warehouse facility. This facility environment, storage conditions and management processes will vary.

**Workers Compensation (WC) Insurance** - Covers work related injury to employees.