FROM CHAOS TO CONTROL

WHERE TO START?
☑ SCHEDULE A SITE VISIT
☑ RECEIVE ADVICE AND ASSISTANCE WITH YOUR CLEAN-OUT

HOW DOES IT WORK?

IDENTIFY YOUR RECORDS
- WHAT DO YOU HAVE?
- WHAT ARE THE DATE RANGES?
- ARE YOU THE OFFICIAL RECORD KEEPER?
- SEARCH THE RETENTION SCHEDULE DATABASE

RM3 FORM & DESTRUCTION
- IF RETENTION HAS BEEN MET, SUBMIT THE CERTIFICATE OF RECORDS DESTRUCTION (RM3 FORM) FOR APPROVAL
- DESTROY ELIGIBLE RECORDS USING THE CORRECT DISPOSAL METHOD

STORE & TRACK THE RECORDS
- PROPERLY BOX BY DESTRUCTION YEAR THE RECORDS YOU MUST KEEP
- ENSURE STORAGE SPACE MEETS THE PHYSICAL RECORDS STORAGE STANDARDS
- TRACK LOCATION AND RETENTION BY USING URMA

TOO MUCH TO STORE ON-SITE?
- SELECT AN OFF-SITE STORAGE VENDOR
- SHIP RECORDS OFF AND FORGET ABOUT THEM!
- NEED THEM BACK? BOX RETURN AND SCAN-ON-DEMAND ARE AVAILABLE