

SECURE RECORDS SOLUTIONS

REQUEST BOX
PICK-UP & STORAGE
ONLINE STEPS

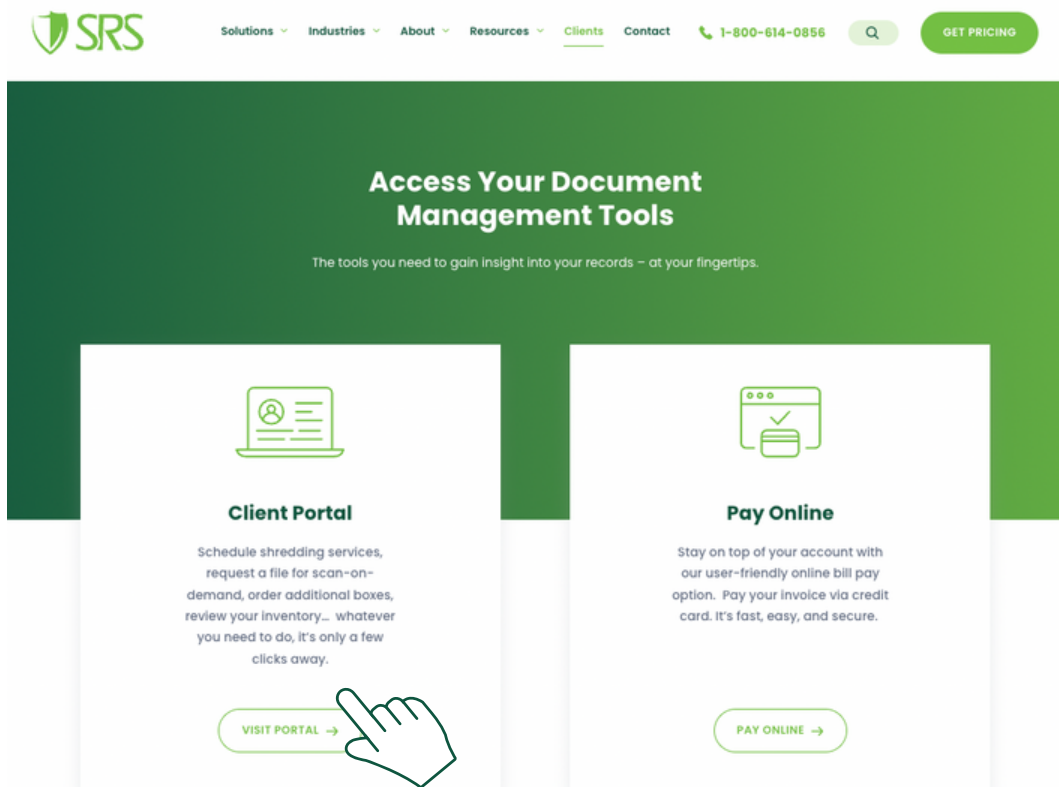


STEPS TO REQUEST BOX PICK-UP & STORAGE

1. Visit www.securerecordssolutions.com and click on "CLIENTS" in top menu or visit www.securerecordssolutions.com/clients to access the clients page directly.

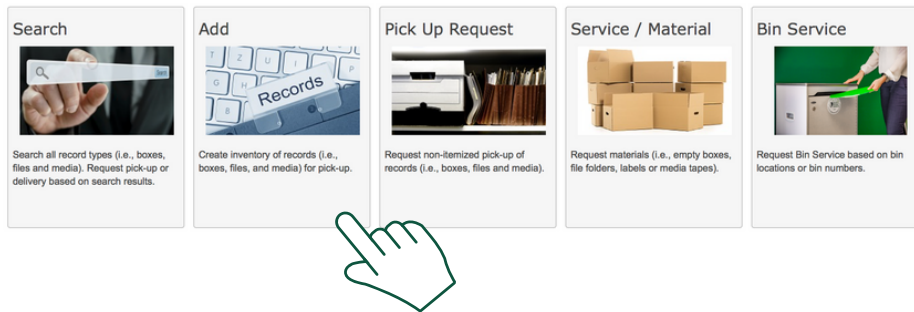


2. From the Client Page (www.securerecordssolutions.com/clients), click on the "VISIT PORTAL" button on the lefthand side of the page. Login using your username and password. If you need password assistance, email clientcare@securerecordssolutions.com.



STEPS TO REQUEST BOX PICK-UP & STORAGE

3. To have boxes picked up for storage select "Add".

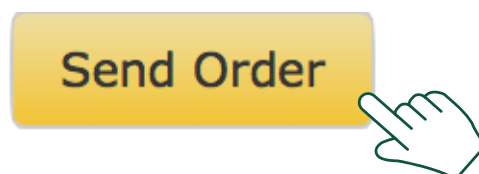


4. Fill in the Barcode section with the number from the labels provided (see separate instruction sheet for requesting those).

In the Description, list the quantity of boxes and the department location. The “Expire Date” is the date the records meet their retention requirement. The From and To Dates apply to the data range of the records in the box. Please include any Indexed Notes related to the type of records in the box. Once all information is complete, select “Save”.

The image shows a screenshot of the 'Add Item' form. At the top, there are four dropdown menus: 'Customer' (MAIN.PO1.Bluewing Family Practice), 'Department' (DEMO HOME OFFICE), 'Type' (CONTAINER), and 'Requested For' (SRS DEMO). Below these is a checkbox for 'Retain data entered on add'. The main form area has several green input fields: 'Barcode', 'Description', 'Expire Date 1', 'From Date', 'To Date', and 'Indexed Notes'. At the bottom right, there are 'Save' and 'Close' buttons. A hand cursor is pointing to the 'Save' button.

5. Select the cart in top right corner of the screen.



STEPS TO REQUEST BOX PICK-UP & STORAGE

6. Select "Standard Service" and then click "Send".

Complete Send Order - PO1 Bluewing Family Practice

Delivery Address

Default Delivery Address

Select Delivery Address

Address

State

Order Information


Customer Order Reference

Charge to Department

Comments

Customer Pickup - Standard Service
Destruction Services
Detail Indexing
Micro Film Destruction Not NAID Certified Service
Recycle Not NAID Certified Service
Scan on Demand
Standard Service
Unscheduled Shred Service

Send Cancel



7. Review your Work Order Confirmation. Our team will schedule a time to pick-up your records.

If you need further assistance, feel free to contact our team.

Phone: (229) 226 - 0414
Phone: (850) 656 - 6900