



# INTERIORVAULT

SECURE DOCUMENT STORAGE & DESTRUCTION

661 W. ATHABASCA STREET, KAMLOOPS, BC V2H 1C5 PH: 250. 372. 1897 TF: 866. 772. 9154 FX: 250. 372. 2019  
( A MILTON GROUP COMPANY – SINCE 1897 )

Thank you very much for choosing Interior Vault to service your Record Storage and management needs. We look forward to providing your company with the long-term relationship and the quality service your company deserves.

This Customer Procedure Manual has been designed as a general guideline to aid your company and Interior Vault, in quickly accessing and organizing your records. Following these guidelines will help enable us to provide outstanding service when accessing your records.

The forms that need to be utilized, to aid in storage and retrieval of your company's records, are located on the last page of each section. Keep these documents as original forms and make copies as needed when requesting service. Note: Please help us keep our costs down by maintaining these original documents in good condition.

## GENERAL INFORMATION

**Address:** Interior Vault Ltd, A Milton Group Company since 1897  
661 W. Athabasca Street, Kamloops , British Columbia V2H1C5

**Phone Numbers:** Administration: (250) 372 - 1897  
Toll Free: 1 (800) 772 - 9154  
Fax: (250) 372 - 2019

**Office Hours:** Monday - Friday : from 8:00am to 4:30pm

**Holiday Schedule:** We observe the following Holidays and will not be staffed.

New Years Day	Labour Day
Good Friday	Thanksgiving Day
Victoria Day	Remembrance Day
Canada Day	Christmas Day
B.C. Day	Boxing Day



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## SECTION 1 – PREPARING NEW CONTAINERS FOR PICK-UP

1. Use only record storage containers for your archive records. Copy paper boxes, moving cartons or similar cartons are not durable enough. High quality, standard record storage cartons (10"x12"x15") are available from Interior Vault for your letter, legal and medical size records. The large transfer case type containers, though acceptable, are very heavy and difficult to maneuver.
2. Apply one Interior Vault Container Barcode Label to the end of each container (below the lid line). Please call if you are not sure where to place the barcode. **All containers requested for pick up must have a Interior Vault bar code attached by your company, prior to pick-up.**
3. Complete the Container Transmittal Form. Refer to the last page of SECTION 1 to obtain your company's customized, original form,

Note: Many companies choose to maintain their own inventory on a spreadsheet or other data base system. If your company decides to maintain its own inventory, your company must use the Interior Vault Container Barcode Number as your reference number when requesting service. Your company does not need to complete the transmittal form if this is the case, **but you still must use a container barcode number for each inventory container.**

- a. **Barcode Number** - This is the Interior Vault Container Barcode Number
- b. **Alternate ID** - This is used if your company has its own inventory system with its own container numbering system. Your company must pay special attention in avoiding any duplicate Alternate ID numbers
- c. **Record Title** - Your company may choose to track containers assigned to a specific Department or Cost Centre. For example; Accounting, Human Resources, Project Files, Maintenance, Legal, etc., Can all be set-up as individual departments within your account. Each department will be assigned a "department Code" (maximum length of 8 alphanumeric



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characters) and “Department Description” (maximum length of 35 alphanumeric characters). Please set-up your department identification with Administrative staff prior to requesting containers to be picked-up.

- d. Description** - Category Codes are used to group like file types. For example, your Accounting Department could have Accounts Payable (AP) files and Accounts Receivable (AR) files.
  - e. Sequence Range** - This field is used to further define the contents of the container either alphabetically or numerically (maximum length of 15 alphanumeric character). For example, all your 1996 Accounts Payable files may not fit in one container. In this case, your first container might read “ABC Co” to “Leonard Co” or “100” to “150” (if your company numbers its vendors). Your second container might read “Lester Co” to “Rogers & Sons” or “151” to “255”.
  - f. Years (Date Range)** - This field is used to further define the contents of the container. Use complete date format “mm/dd/yy” for both the beginning date and ending date range of a specific container. For example, your company might arrange its Accounts Payable records by the calendar year - 01/01/96 to 12/31/96.
  - g. Destroy (or Review) Date** - This field is used in conjunction with your company’s Record Retention Policy. This field is intended as a notification device to inform your company when certain containers have exceeded their retention period or retention review period. Refer to “Section 3 – Requesting Containers to be Destroyed - regarding the destruction of your company’s containers. Note: Interior Vault will never automatically destroy a container when the retention period has expired.
4. Make copies of all completed transmittals. Retain carbon original copy in a file for your company’s records and one to specific department head (if applicable) and give the original transmittals to the Interior Vault driver at the time of pick-up.
  5. Complete a Service Request Form to facilitate a request for container delivery or pick-up (refer to the last page of SECTION 2 to obtain your company’s customized, original form.



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## **A FEW HELPFUL SUGGESTIONS WHEN PACKING YOUR CONTAINERS :**

Try to pack each container with a single file category without multiple date or sequence ranges. This will enable us to provide you with a much “cleaner” inventory report. Also, each file category may have different retention requirements. So, for this reason, it is best to keep various record categories separated.

Please don't use the phrase “Miscellaneous Files” when identifying containers! This description is too broad to be truly effective. Be as specific as possible! Consistency is very important. Maintain the same format for each category. For example, if your company refers to its Accounts Payable records as “Accounts Payable” , don't change the term halfway through and start referring to them as “Vendor Files”. Use your inventory report as a reference to help maintain consistency.

Please, only mark one end of the container with your contents information. The blank end of the container will be the placement area for the barcode. This will provide a level of confidentiality because the only identification that appears outward in our record centre is the actual barcode itself. If you prefer to use new unmarked containers, Interior Vault can supply these to you at an economical price.

You may use as many or as few of the available fields provided, to organize your records. If your company maintains its own inventory report, a Interior Vault Container Transmittal Form still needs to be completed. However, your company should use the Interior Vault Container Barcode Number as the reference number when requesting containers.

The simplicity in managing your current inventory is, to record our barcode in front of all your descriptive file carton inventory.



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## SECTION 2 – REQUESTING CONTAINERS OR FILE FOLDERS FOR DELIVERY OR PICK-UP

1. Use your inventory report to determine the container or file folder barcode number that your company wants to request for delivery or pick-up.
2. Complete a Service Request Form and fax it to the number listed at the bottom of the form (refer to the last page of this section to obtain your company's customized, original form).
  - a. In the two upper-left sections of the form, please note the department that is requesting service (if applicable), the requestor, the date and time that the form is being completed and the Service Priority.
  - b. Please make a note in the section titled "Comments", if there are any unusual situations, in which our drivers may encounter at the pick-up or delivery site (i.e. excessive stairs, long carry distance, odd size or large containers, no elevator, etc.). Pick-ups are normally scheduled for the next business day, unless there are only a few containers or file folders and if Interior Vault is currently completing a service request for your company at the same time.
  - c. To request a file folder for delivery, complete the section of the form titled "File Folders To Be Delivered" listing the Interior Vault Container Barcode Number, the file folder number and (if applicable) and the description of the file folder.
  - d. To request a container to be delivered, complete the section titled "File Folders To Be Delivered" listing each Interior Vault Containers Barcode Number and the Container Description.
  - e. To request containers or file folders to be picked-up, complete the section titled, "Pick-up" at the bottom of the form, noting the quantity of each type (containers or file folders) that your company wants picked-up. If you are requesting new containers to be picked-up, be



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certain to hand all completed Container Transmittal Forms to the Interior Vault driver. Refer to “SECTION 1 – Preparing New Containers for Pick-up”.

- f. The signature of an authorized employee from your company must appear at the bottom of the form. Any order received by our Record Storage Administration without an authorized signature will not be processed. Refer to “SECTION 4 – Record Storage Security” of this manual to obtain your company’s customized, original form. This step must be followed to prevent requests by unauthorized personnel, from your company.
3. If your company is requesting more containers or file folders than will fit on one Service Request Form, please complete a second Service Request Form and so forth until all items are requested.

## SECTION 3 – REQUESTING CONTAINERS TO BE DESTROYED

1. Use your Inventory Report to determine the Interior Vault Container Barcode Number that your company is requesting for destruction.
2. Complete a Destruction Request Form and fax it to the number listed at the bottom of the form. Refer to the last page of this section to obtain your company’s customized, original form.
  - a. In the upper section of the form, please indicate the specific department that is requesting containers for destruction (if applicable), the requestor, the date and time that the form is being completed.
  - b. Please indicate any unusual information regarding the request for destruction in the section titled “Comments”.
  - c. Indicate the containers that your company is requesting for destruction in the section titled “Containers to be Destroyed”. The Interior Vault Container Barcode Number must be listed.



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Any request for destruction received by our Record Storage Administration without the Interior Vault Container Barcode Number listed, will not be processed.

- d. If your company has a large quantity of containers to be destroyed, refer to the section of the form that reads “Refer to the enclosed Inventory Report dated \_\_\_\_\_ and destroy all containers highlighted in \_\_\_\_\_”. Fill in the date of the inventory report that is being used to indicate the containers for destruction and the colour of the highlighter(s) used. Note: if this portion of the form is completed, then the inventory report must be mailed to Interior Vault.
  - e. Two authorized employees from your company must sign and date the Destruction Request Form. Any order received by our Record Storage Administration without the authorized signatures, will not be processed. This step must be followed to prevent any unauthorized destruction of your company’s records. Refer to “SECTION 4 – Record Storage Security” of this manual to obtain your company’s customized original form.
3. A Pre-Work Order will be prepared by our Record Storage Administration and mailed to your company listing all containers that are identified on the Destruction Request Form. Please verify that the containers printed on the Pre-Work Order are identical to the containers indicated on the Destruction Request Form. If any discrepancies are noticed, please contact our Records Administration to have the Pre-Work Order revised.
  4. Once the Pre-Work Order and the Destruction Request Form have been re-verified and are accurate, the Interior Vault Pre-Work Order must be signed by one of the two authorized employees that signed the Destruction Request Form. Fax to Interior Vault using the number that is printed on the bottom of the Destruction Request Form.
  5. Once the Record Administration has received the signed Pre-Work Order, Interior Vault will have the containers retrieved and destroyed. A Certificate of Destruction, a copy of the final Destroy Work Order and an inventory report listing all the destroyed containers will be sent to your company after all destroyed containers have been removed from storage.



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In some cases if necessary, an authorized signatory for your records destruction may be present at the time of destruction as a witness.

This procedure has been designed to give your company the most control over the destruction of archived records.

## **SECTION 4 - RECORD STORAGE SECURITY**

1. Interior Vault OFFERS A Security form to ensure that only authorized employees may place a request for service. To complete a Security Form, refer to the last page of “SECTION 4 - Record Storage Security” of this manual to obtain your company’s customized, original form. A Security Form must be completed regardless of the security level your company uses. This security system can be customized for your company’s unique and specific needs. Please call our Record Storage Administration staff for further details.
2. Below is a list of three basic levels of security:
  - a. Every employee within your company can place requests for service (no security).
  - b. Only specific employees within your company can place requests for service. Each authorized employee’s first and last name, department assigned and signature must appear on the Security Form. Also, indicate whether the designated employee is authorized to view all other department’s records (in addition to the department that the employee is assigned), authorized to destroy company records and also authorized to request inventory reports.
  - c. Only password specific employees within your company can place requests for service. Each authorized Employee’s first and last name, department assigned and signature must appear on the Security Form. Also, indicate whether the designated employee is authorized to view all other department records (in addition to the department that the employee is assigned), authorized to destroy company records and also authorized to request inventory reports.



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Call our Record Storage Administration for further details or to assign employee passwords.

3. If your company has a mixture of specific employees authorized and specific employees authorized with Passwords, a separate form needs to be completed for each security level

Note: If your company chooses not to complete and return a Security Form, Interior Vault will default to the contact person that is indicated on the New Account Set-up Documents. All other employees will be denied access to your company records. Employees will be given access to your company's records only after Interior Vault has received a completed Security Form.

## **SECTION 5 - RECORD STORAGE INVENTORY REPORT**

1. Various reports are available to help manage your records better. There are two basic types of reports:
  - a) **CONTAINER INVENTORY REPORTS** - All containers assigned to your company's account or for a specific department within your company's account will be listed on an inventory report. We normally print only the containers that are currently in storage and normally remove any containers that have been destroyed or permanently removed from storage from the report. Interior Vault can print a complete inventory report that includes all containers that have been stored, regardless of the containers current disposition. Interior Vault can sort your company's inventory report by any of the fields shown on the Record Storage Transmittal Form (except the description field).
  - b) **CONTAINER ACTIVITY REPORTS** - Containers that meet a certain activity criteria will be printed on this report. The most popular of these reports is the "Containers Added" report that only shows the containers added during specific dates or activity for that month.



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2. To request an inventory report, complete an Inventory Report Request Form and fax it to the number listed on the bottom of the form (refer to the last page of this section to obtain your company's customized, original form).

a) In the upper section of the form, please indicate the specific department that is requesting an inventory Report (if applicable).

b) Please indicate any additional comments pertaining to the Inventory Report Request Form in the section titled "Comments".

c) Check the box in the section titled "Standard Report Format" to receive a standard report. A standard will indicate all containers currently in storage, only. This report will not include any containers that were stored at Interior Vault and then permanently removed or destroyed by your company at a later date. The fields below will appear on this report in the following order from left to right. This report is a very similar to the Container Transmittal Form in Section 1.

- Interior Vault Container Barcode Number
- Alternate I.D.
- Category Code
- Sequence Range
- Date Range
- Add Date
- Destroy (or Review) date
- Description
- Interior Vault Container Barcode Number
- Alternate I.D.
- Category Code
- Sequence Range
- Date Range
- Add Date
- Destroy (or Review) date
- Description



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- d) In the section titled “Complete Inventory Report”, check the 2 report criteria your company desires.
  - e) In the section titled “Individual Department Inventory Request”, annotate whether your company desires one inventory report with specific departments merged together or whether your company desires one inventory report for a specific department(s).
  - f) In the section titled “ Container Activity Report”, annotate whether your company desires an inventory report with specific information, such as Containers Added during specific dates, pick-up on a specific Work Order Number or Containers Shipped during specific dates, delivering on a specific Work Order Number.
  - g) In the section titled “Sorted Report By”, annotate which field(s) that your company would like your report Sorted by using the columns from the Record Storage Transmittal Form. A maximum of three fields can be Selected in order of importance or priority. For example, your company may want an inventory of all the Accounting Department (department), Accounts Payable records (Category Code), from 01/01/2000 (Date From), in alphabetical order from “A” (Sequence From) to “Mi” (Sequence to). Your company may also want to have an inventory report of all containers that your company is currently storing, in numerical order by Barcode Container Number, regardless of the date sequence or alphabetical sequence.
  - h) An authorized account representative must sign and date the Inventory Report Request. Any request Received by our Record Storage Administration without an authorized signature will not be processed. Refer to “SECTION 4 – Record Storage Security” of this manual to obtain your customized original authorization form. This step must be followed to prevent the unauthorized requests for inventory reports.
3. Maintain a file or binder to keep your inventory reports. Once you receive an updated full inventory report from Interior Vault you may want to discard the “Containers Added” report(s).



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4. For additional information regarding inventory reports that aren't included with this section, please don't Hesitate to contact our Record Storage Administration, using the information at the bottom of the Inventory Report Request Form.

## **“OUR SERVICE... IS YOUR SECURITY”**

Interior Vault is a A Milton Group Company,  
a proud local business partner in Kamloops - since 1897

**FOR MORE INFORMATION, PLEASE CALL:  
250. 372. 1897 OR 866. 772. 9154**