CitiStorage

We barcode it.
We organize it.
We record it.
We file it.
We store it.
We retrieve it.
We move it.

INTRODUCTION TO THIS GUIDEBOOK

Welcome to CitiStorage!! We provide a variety of records management services. This guide is intended to help you, our valued client, utilize our services with as much ease as possible. By using this guide you will help us to provide the quality service you can expect from CitiStorage.

Our Customer Guidebook will hopefully address any questions you might have about our services. If you do not understand something, we encourage you to contact one of our Customer Service Associates at 718-782-1100 ext. 2 to help you with your questions. You can also arrange to have your Account Executive visit you, at your office, to help you in person.

The CitiStorage team is here to assist you at all times!! In addition, please feel free to visit our facility or contact us directly so we may address your concerns and questions. Our number one goal is to make you happy.

Thanks for being part of the CitiStorage family.

Sincerely,

Louis Weiner

Louis Weiner
President

ACCOUNT SET-UP

There are many different account set-up options. CitiStorage has the ability to bill main accounts, departments and/or cost centers. Your account representative can help you design the correct account set-up method. If your organization requires purchase requisitions or purchase orders to be issued, it is very important that this process be done in a timely fashion and that these Purchase Orders are forwarded to CitiStorage.

FILES TO BE PURGED

CitiStorage is available to purge your file room. Each file can be barcoded and indexed along with a destruction date. Additionally, CitiStorage is able to perform various on-site file relocation projects. This is an additional service that can be provided.

BOXES FOR STORAGE

We encourage you to use boxes purchased from CitiStorage although they are not required. Our boxes are specifically designed for records storage and can withstand the weight and handling when fully packed. The walls of our boxes are doubled for added strength. Boxes that are flimsy, old or oversized should not be used in our storage system. These boxes tend to break down over time and threaten the protection and security of your records. Excessively packed containers make retrieving files within the box very difficult. Please try to allow at least 2 inches of free space within each carton for working room. It is also best to only use boxes with handles cut into each end.

BARCODES

Your account will be assigned a set of barcodes. It is essential that every container entering our records center be barcoded and has a destruction date prior to pickup. Affix one bar code label on the handle side (short side) of each container. Each box may also be given an identifying alpha and/or numeric number (up to 12 characters). This number will be used by your authorized employees to identify your records. We recommend you use only the CitiStorage barcode number to identify your box. The barcode number can be scanned into the system thereby minimizing the chance for human error. It is imperative that you do not share barcodes between different departments. Our barcodes are specifically assigned to an individual

department and sharing barcodes between will result in the wrong department being billed for storage and services. Request separate barcodes for each department.

For your protection, please make sure you keep a master list, matching the barcode and any other identifying numbers with the contents of your containers. You may choose not to utilize our data entry services or online service if you have your own database system. If you do not have a database system specifically designed to track files available to you, we recommend using an Excel spreadsheet to track your files. This information can be imported into our database as either a backup to your own records or your prime source of information. Simply email the spreadsheet to: **customerservice@citistorage.com** . Please remember to retain some type of master list for your records. Unless we are instructed to do so, we are not responsible for creating a master list of any box contents.

If you require more barcode labels or additional information, please contact our Customer Service Department at **718-782-1100 ext. 2** for prompt assistance.

RETRIEVALS

Retrievals are items you wish to recall that are stored at CitiStorage. You can retrieve either entire boxes or individual files within a box. To retrieve a box or file, contact Customer Service and give the following information:

- Account name
- Account number
- Your name (for your security reasons only authorized personnel can request records. Contact us to update your list).
- Type of service/delivery requested
- Box number (and file name and number if requesting a file).
- Delivery location and recipient of material
- Special instructions

REFILES

Refiles are items (boxes or files) that you wish to return to CitiStorage, that have been previously retrieved from CitiStorage. To return a refile, contact a Customer Service Associate and schedule a pick-up. **Boxes with barcodes on them** that were previously delivered to you should be returned intact. **DO NOT write "Refiles" on these boxes**. They should be given to the driver along with any new barcoded boxes that you have going into storage. **Individual files that have previously been delivered to you (which will have file barcode labels on them) should be placed in a box WITHOUT A BARCODE. You should clearly label this box "Refiles"**. If you are sending files that have never been at the CitiStorage facility, you must indicate on the file the box number into which it is to be interfiled. The barcode number of that box is the preferred number to use.

DESTRUCTION

As mentioned above, all boxes should be put into storage with a destruction date. This will control the amount of inventory you accumulate and reduce unnecessary storage. CitiStorage will need a list in an *Excel* spreadsheet format of all boxes going into storage with the barcode number and appropriate destruction date. We can then send you a list at a predetermined interval of boxes scheduled for destruction. Nothing will be destroyed without proper approval signatures from the customer. Once CitiStorage destroys the records, a *Certificate of Destruction* will be provided.

BILLING

Our customized monthly billing reflects all your storage and service activity. Specific charges are outlined in an easy to read and understandable format. The following items are a general description some of these rates. If special conditions apply to your account and you have questions or need assistance, call your CitiStorage Account Representative who will be glad to help you.

PICKUPS & DELIVERIES

A **"Pickup"** charge is the charge for making one stop at a specified customer address, for the purpose of moving inventory (files and/or boxes) between the customer's site and the CitiStorage Records Center. Each unit picked up is charged for separately at the agreed upon rate. If special conditions apply to the pickup, additional charges may be added.

A **"Delivery"** charge is the charge for delivering items from the CitiStorage Records Center to a specified location. CitiStorage typically hand delivers all boxes and files on a next day basis ("Standard Service"). Each unit delivered is charged for separately at the agreed upon rate. We also provide "Emergency," and "Weekend and Holiday" services when specifically requested. Different rates apply based on when the work must be performed to complete the delivery, whether during or after normal business hours. Normal business hours are defined as 9:00 AM to 5:00 PM, Monday through Friday, excluding holidays. Please indicate your desired delivery method when calling our Customer Service Associates.

FACSIMILE AND COPY SERVICES

CitiStorage provides facsimile and copy services as needed. A facsimile (FAX) transmission charge is added for each page of information transmitted via telephone lines and includes both the cost of the phone call and labor to perform the service.

Photocopies of customer's documents are charged per page, single-sided, up to a legal size maximum including CitiStorage labor to make the copy.

COMPUTER SERVICES

CitiStorage data entry staff members perform data entry services in order to update information about customer's inventory, whether it is individual file listings, changes or removals, or destruction of computer-listed information. Charges are added per line of data entry.

Requests can be made for computer listings (All Containers Report, Containers Added, etc.) of customer's inventory from CitiStorage's Customer Service Department. Requests for these or other reports to be issued on a pre-scheduled basis may be set up as well. Charges for reports are based on the number of pages per report.

On request, CitiStorage can provide many types of customized reports. These will help you to better track the inventory you have stored. Our computer generated lists can take the data in our system and present it in a manner that will allow you to sort it with complete flexibility. Please contact your Account Executive to discuss how our customized reports can best serve your needs.

CITISTORAGE ONLINE

Customers may access their account data on the CitiStorage database via CitiStorage's Online Service. Secure logins and passwords are assigned only to authorized personnel. Our online service allows the customer access only to their information via our website located at www.citistorage.com. Customers may look up information, create requests for services, add or edit data entry items, and communicate with CitiStorage staff via e-mail.

Customers are required to provide the necessary hardware and Internet access. CitiStorage provides the database software as well as initial setup and training. Charges apply for initial setup costs and monthly usage fees.

OTHER RECORDS MANAGEMENT SERVICES

Records Management Services define the many and varied services available from CitiStorage, which may not be specifically described elsewhere in the rate schedule. A per file rate or per box rate applies to such "special projects" which a customer may request from time to time. These may include, but are not limited to, inventory or indexing services, boxing of records, records transmittal preparation, interfiling, data entry, internal or external inventory transfers, etc.

DIRECTORY

Customer Service: 718 782-1100 Ext. 2

Customer Service Supervisors:
Denise Hinds – Ext. 133
Adrienne Bundy – Ext. 100

Billing Questions: 718 782-1100 Ext. 168

Sales/Special Projects: 212 279-4300

MEMBERS OF: