
IRON MOUNTAIN FILE RETRIEVAL (PSL-W007)
Sacramento City Unified School District

1.0 SCOPE:

- 1.1 This work instruction is used to obtain personnel files that are warehoused at a facility named Iron Mountain for Sacramento City Unified School District.

2.0 RESPONSIBILITY:

- 2.1 Personnel Office Assistant

3.0 APPROVAL AUTHORITY:

- 3.1 Director of Human Resource Services

Signature

Date

4.0 DEFINITIONS:

- 4.1 Personnel File Record—File folder that contains all of the data, transactions, and employment records that the employee has had within his employment with the Sacramento City Unified School District.
- 4.2 Iron Mountain Records Management—Vendor that houses all of the Sacramento City Unified School Districts personnel employment records/ files.
- 4.3 HRS—Human Resource Services.
- 4.4 Website: www.safekeeperplus.com
- 4.5 POA—Personnel Office Assistant.

5.0 WORK INSTRUCTIONS:

- 5.1 POA receives a request from HRS staff member by email, verbal, form, and/or handwritten.
- 5.2 POA logs into the website.
- 5.3 POA selects [SafeKeeperPLUS.com Non-Secure](http://SafeKeeperPLUS.com) with the mouse.
- 5.4 POA enters the Login ID and Password.
- 5.5 POA selects the Enter Order.
- 5.6 POA selects Retrieval.
- 5.7 POA selects BMI –Personnel File.
- 5.8 POA selects Start Order.
- 5.9 POA clicks in the field box for File Description 1 and enters the social security number of the file requested; if the social security number does not bring up a personnel file record, POA types in the full name of the employee.
- 5.10 POA clicks Search.
- 5.11 POA clicks in each field box until a personnel file record is displayed; if none is displayed then there is not a file at Iron Mountain.

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- 5.12 POA clicks on View Order.
- 5.13 POA clicks on Details to verify the name of the personnel file record is the correct one.
- 5.14 POA clicks on Add More Items if additional personnel file records need to be ordered and repeats previous steps 5.8 to 5.12.
- 5.15 POA clicks on the small box at the left of the personnel file record that appears after the search button has been clicked.
- 5.16 POA clicks on Add selected Items to Cart.
- 5.17 POA clicks on View Order.
- 5.18 POA clicks on Check Out.
- 5.19 POA clicks on Post Order.
- 5.20 POA clicks on Click Here to View Order Details.
- 5.21 POA prints this page for record transaction.
- 5.22 POA clicks on Exit SafeKeeper Plus.
- 5.23 Personnel File Records are mailed into the district office attention to POA.
- 5.24 POA distributes the personnel file record to the HRS staff member who initially requested the file.
- 5.25 POA mails the personnel record file back to Iron Mountain and follows the steps above 5.3 to 5.5.
 - 5.25.1 POA selects Pickup.
 - 5.25.2 POA selects Individual File Re-file.
 - 5.25.3 POA clicks on the File Quantity field and enters the number of personnel record files to re-file.
 - 5.25.4 POA clicks on Add to Order.
 - 5.25.5 POA clicks on View Order.
 - 5.25.6 POA clicks on Check Out.
 - 5.25.7 POA repeats steps 5.19 to 5.22 above.
 - 5.25.8 Place the personnel record file in the Iron Mountain Packaging from previous file requests that were delivered and place at the Human Resource Services Front Counter for Iron Mountain pick up. Iron Mountain Delivery Person will come by to pick up the re-files.
- 5.26 Personnel File Records requests are processed as they are received by HRS staff.

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6.0 ASSOCIATED DOCUMENTS:

- 6.1 Email and/or hand written requests
- 6.2 Request for Employee Records (PSL-F085)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Employee Personnel File Record from 1999 to current	Iron Mountain	Permanent	Discard as desired	Access limited to POA and/or HRS staff member

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/03/04	A	Initial Release
10/08/07	B	Approval Authority department name change

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