



Proposal For Records Storage, Retrieval & Disposal Services RFP 12257-095

Submitted By: SML Document Services, Inc.
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Submitted To: City of Fort Lauderdale
Procurement Services Division
City Hall
100 N. Andrews Avenue, #619
Fort Lauderdale, Florida 33301

Bid Opening Date: April 3, 2019

Bid Opening Time: 2:00 PM EDT

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ORIGINAL

TABLE OF CONTENTS

1. Executive Summary	1
2. Experience and Qualifications.....	2
3. Approach to Scope of Work.....	9
3.1 Transition Plan.....	9
3.2 Document and Media Storage.....	11
3.3 Retrieval and Refiling	12
3.4 Courier.....	12
3.5 Access Controls	12
3.6 Destruction Services	12
3.7 Special Searches	13
3.8 Computerized Inventory and Tracking System.....	13
3.9 Imaging.....	15
3.10 Records Management Plan Project Approach.....	16
4 References.....	25
5 Minority/Woman (M/WBE) Participation.....	27
6 Subcontractors.....	27
7 Required Forms.....	28
7.1 Proposal Certification.....	28
7.2 Cost Proposal	30
7.3 Non-Collusion Statement	32
7.4 Non-Discrimination Certification Form	33
7.5 Local Business Preference (LBP).....	34
7.6 Contract Payment Method.....	36
7.7 Sample Insurance Certificate.....	37
7.8 Questionnaire.....	39
8 Samples of SMLDS's Standard Operating Procedures.....	43
9 Sample Reports	46

1. Executive Summary

SML Document Services, Inc. (SMLDS) is a full service Records Management company that provides complete life cycle management of records from inception through final disposition. A sister company to SML, Inc., it was established to satisfy the offsite storage needs of the government agencies for which SML has written a Records Management Plan. SMLDS possesses the capabilities, experience, knowledge and financial stability to meet or exceed all of the requirements of this RFP.

The Management Team consists of Steve Lewis, Richard Ruck and Robert Kyff who have over 100 years of combined experience in the industry.

Steve Lewis has written a detailed Records Management Plan for over 400 government agencies in the State of Florida to insure that these agencies are in compliance with Chapter 119 of the Florida Statutes, Public Records. He has also implemented the best practices and procedures for maintaining both active and inactive records for many of these clients. Since SMLDS views that a comprehensive Records Management Plan is an integral part of any Records Management Program, SM will prepare such a Plan for the City **at no additional cost**. This will insure that the City maintains a legally compliant program at all times and is current with the proper disposition of records.

Richard Ruck has been an owner/operator of record centers and has implemented programs for clients that range in size from a few boxes to over 300,000 boxes. Working closely with Steve Lewis over the last 15 years, he has implemented off site storage programs for a number of government agencies throughout the State of Florida including the Cities of Key West, Coral Gables and Doral as well as the Department of Children and Families, Department of Health, numerous School Districts and others.

Robert Kyff has worked in the Document Storage business for over 30 years. His experience has been in start-ups, regional management at the second largest global document storage company, acquisitions as well as owning document storage, document scanning and recycling companies.

This proposal provides details on the storage, retrieval and disposition of records, document imaging capabilities, and Records Management consulting services. By combining all of these capabilities, SMLDS is positioned to provide a high level of service at competitive pricing. SMLDS will meet or exceed all of the technical aspects required by this RFP including services, facility and personnel.

The key elements of this proposal include transferring all records in a secure and orderly manner from the current vendor, storing those records in a secure, compliant record center, validating the inventory, reporting discrepancies and providing for the proper disposition of records that have reached their retention period in accordance with the City's requirements.

Experience and Qualifications

Steve M Lewis Document Services, Inc. (dba SML Document Services, Inc.) is a Florida Corporation. The company has extensive experience assisting both Government and private sector organizations with establishing the policies and procedures that are needed to administer a compliant cost effective Records Management Program. These capabilities are extended to the off-site storage services discussed in this proposal. The SMLDS Management Team has over 100 years of combined experience providing Records Management Services including off-site storage and related services, document scanning and consulting services. Contact information on the Management Team and resumes follows:

Steve M. Lewis
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Experience with past projects of a similar nature are listed in Section 4 of this proposal, Experience. They will be assisted by various SMLDS Support Staff, Records Technicians and Consultants as needed to satisfy the requirements of SMLDS's response to the RFP. There will be no sub-contractors used on this project. Resumes are attached.



Steve M. Lewis

Steve M. Lewis is an independent Records and Information Management Consultant with over 42 years experience at nearly every size and type of government agency. Clients range from small towns to major cities, counties, school boards, state agencies, universities, community colleges, utilities, transportation, law enforcement, court and regulatory agencies. Has held two vice-president positions in the corporate world. Client list generates extensive experience in the private sector to include the defense industry, manufacturing and service sectors - nationally and internationally. Has managed collections as large as two million cubic feet. Services cover a broad spectrum to include designing records management plans, designing systems, identifying records eligible for destruction, assisting with legal compliance, providing training and nearly any other records and information related service requirement.

Work Experience

3-11-1999 to Present

INDEPENDENT CONSULTANT, PRESIDENT - SML, Inc., a Florida Corporation

Independent Consultant, Information Management Analysis, Design, Planning and Training. Offer a nearly unlimited range of Information Management consulting services. Specialize in Florida Public Records; yet continue to service the Private Sector as well. Provide Lecture Series to State University System covering a wide range of Records Management and Public Record Law Issues.

4-1-91 to 3-10-99

VICE PRESIDENT - GOVERNMENT SECTOR. Florida Data Bank, Inc.

Primary responsibilities include: provide a wide range of consulting services to include but not limited to writing Records Management Plans, writing procedures, writing records retention schedules, and writing vital records protection plans; identify records for destruction, manage Government accounts; develop new services and accounts; and maintain expertise in Florida Public Records Law and Florida Department of State requirements. Instruct classes for the Florida Institute of Government at Colleges and Universities throughout Florida in Public Records Law and Management.

9-14-81 to 3-30-91

Various Positions in Florida State Government.

Bureau of Local Planning, Division of Resource Planning and Management, Florida Department of Community Affairs. Primary responsibilities included: management of public records relative to local comprehensive plan process.

Management Information, General Services, Administrative Services, Florida Department of Health and Rehabilitative Services. Primary duties included: management of two million cubic feet of records statewide; supervise the programs of 12 district records managers;

RFP-12257-095 Records Storage, Retrieval & Disposition Services
SML Document Services, Inc, Inc. Response

review pending legislation; and design and implement new records systems. Monitor each district on site, one week each year.

Bureau of Local Planning, Division of Resource Planning and Management, Florida Department of Community Affairs. Primary responsibility: design and implement records system to manage public records relative to local comprehensive plan process, Rule 9J-5, F.A.C.

Bureau of Archives and Records Management, Division of Library and Information Services, Florida Department of State. Primary duties included: conduct regional seminars on Public Record Laws; provide consulting services to state and local governments; review pending legislation; design records systems; draft standards and procedures and general records schedules.

Florida Police Benevolent Association, Inc. Duty: design system and forms to manage *request for service* functions.

Bureau of Records and Information Management, Division of Archives, History and Records Management, Florida Department of State. Duties very similar to Management Analyst II described above, yet on a smaller scale.

Bureau of Historic Sites and Properties, Division of Archives, History and Records Management, Florida Department of State. Primary duties included: supervise nine employees employed in underwater salvage of antiquities; act as Records Custodian; coordinate record disposition with Bureau of Records and Information Management.

Professional Association Positions:

Tallahassee Association of Records Managers and Administrators Board of Directors
Tallahassee ARMA Chapter Member of the Year.
Tallahassee ARMA President
Tallahassee ARMA Chairman of the Board

Presentations:

Over 5,000 hours of public speaking, to include hundreds of records management lectures to a wide range of audiences - at regional conferences like the South Atlantic Archives and Records Conference, Florida Records Management Association and the National Association of Government Archives and Records Administrators; to special training functions like the Florida Association of Code Enforcement Officers, Florida Tax Collector and Property Appraiser Conferences, Government Career Development Institutes for Florida Municipal Clerks, Florida Department of Revenue for PA and TC and the Florida Clerk of the Courts Association. Regularly conduct a two day Certificate Program on Public Records Law and Public Records Management for the University System at FSU, UCF, FAU, FIU and Palm Beach Community College. Conducted a 32-hour lecture for newly elected Clerks of the Court under contract with FSU, together with a Digest. Recently venues are including international conferences for Sea Ports and Airports.

Publications:

Digest, Records Management for Florida Clerk's of the Court, Published by Florida State University.

Regular monthly columnist, during 2003 for *Records Management Technology* (RMT) an Industry Magazine.

Draft Florida Statutes

Draft Florida Administrative Codes

General Records Schedules for the Florida Department of State.

Spring 2014 *Seaports Magazine*



Richard L. Ruck

Summary: Accomplished executive with extensive experience in all phases of Records Management including operations, sales, financial reporting and strategic planning. Innovative problem solver adept at integrating technology into the records management program. These services were provided to both the private and government sectors.

Profile:

- Successfully started a full service commercial records center storing over 1 million cartons and serving over 300 clients with annual revenue of over \$4 million. Conducted research and implemented alternate storage technologies including document imaging.
- Consulted with several Commercial Record Centers assisting with the start up of operations in new markets including facility design, operations and sales.
- Designed and developed records management software incorporating automated financial reporting and retention scheduling.
- Consulted with various Fortune 500 companies in the development and implementation records management policies and procedures including record retention schedules complying with Federal, State and Local statutes.
- Developed several Disaster Recovery Plans addressing various contingencies involving vital records and sensitive media for corporate clients.
- Implemented and managed projects involving source document conversion to image based systems, including large format drawings and x-rays.
- Designed, purchased and erected high-density record storage systems providing maximum economy and ease of operation.
- Implemented cost effective Records Management Programs, policies and procedures for the storage and retrieval of active and inactive records resulting in budget reductions of over 50% to corporate clients.
- Knowledgeable in LAN systems and software applications specific to records management. Proficient in MS Word, Excel, Power Point, Desktop Publisher and Access. Instrumental in integrating the internet/intranet into the records management function. Also familiar with document imaging hardware and software.

Richard L. Ruck Page 2

Employment History:

Six Years – SML, Inc. – Responsible for preparing and implementing Records Management Programs for both business and government clients.

Eight Years, Certified Records Management – Responsible for daily operations of a full service commercial records center. During this period, increased sales from \$500,000 to \$2 million and EBIDTA to 30%.

Two years, Recall Total Information Management – Responsible for direct sales of a full line of Document Management Services in a major market. Area of concentration is on National Accounts with holdings of over 100,000 cartons and annual revenue in the range of \$500,000 to over \$3 million annually.

Six Years, RLR Consulting – Operations, Sales and Marketing Consultant to a number of document and vital records storage businesses. Organized operations, established telemarketing and sales departments, developed presentations, prepared detailed proposals and negotiated contracts.

Ten Years, Vital Archives, Inc. Responsible for day-to-day operations of a document storage and vital records protection business maintaining over 1 million cartons of records servicing over 300 clients and annual revenues in excess of \$4 million. Directly involved in the entire sales process within a business-to-business environment, including telemarketing, managing sales staff, preparation of proposals, contract negotiation and new business development.

Three Years, Iron Mountain Group, Assistant Vice President of Sales. Responsible for sales, preparation of proposals and contract negotiation in a business-to-business environment for a document storage company. Was personally responsible for securing contracts in excess of \$1 million in the first 12 months.

Education:

Bachelor of Engineering, State University of New York

SMLDS and its principals have no record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and do not have any conflicts of interest that have not been waived by the City Commission.

SMLDS principals, officers, and stockholder are not in arrears or in default of any debt or contract involving the City, (as a party to a contract, or otherwise); nor have they failed to perform faithfully on any previous contract with the City.

3. Approach to Scope of Work

Since this RFP will become a public record, SMLDS cannot provide a design plan and diagrams since this would result in a threat to the security and confidentiality that SMLDS maintains with all its clients. SMLDS invites City personnel to tour our facility and see in person our storage environment and operational capabilities. Required documents can be reviewed at that time.

SMLDS can provide the necessary implementation services for the entire inventory of City records with current staffing and capabilities. There is sufficient space available to accommodate the entire inventory and allow for future growth. It is conceivable that the City's inventory can be reduced if SMLDS's offer to develop a Records Management Plan **at no cost to the City** is implemented resulting in significant savings.

There are several components that are required In order to implement an effective Records Management Program. These consists of a comprehensive transition plan to relocate records from the current vendor, operational support services to store and manage records, and a Records Management Plan that details the Policies and Procedures that must be followed to ensure a legally compliant program.

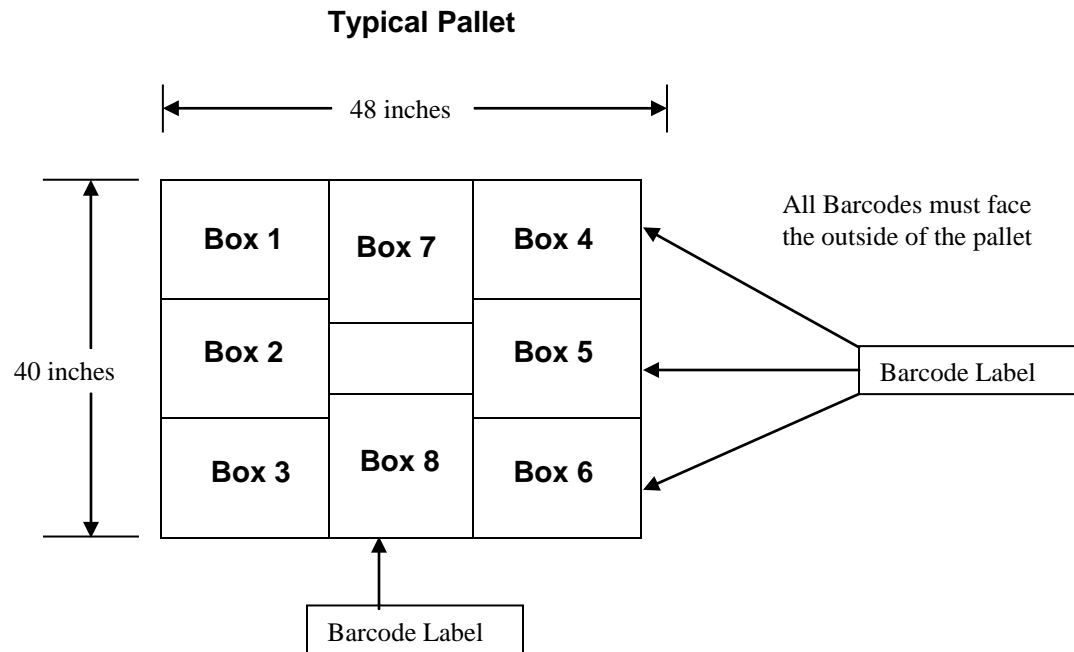
3.1 Transition Plan

SMLDS can relocate all 24,578 boxes in 23 business days, providing that the current vendor can pull sufficient boxes to prepare 24 pallets per day, 48 boxes per pallet. This can be accomplished using current staff.

SMLDS personnel will meet with City representatives immediately following award of this contract. The SMLDS Transition Team will consist of Richard Ruck, Bob Kyff and various Record Technicians and Couriers as needed. Each team member will have specific duties and responsibilities that will insure a timely and orderly relocation. Richard Ruck will serve as Project Manager. He has over 30 years experience operating commercial records centers and has successfully relocated a number of corporate and government clients ranging in size from a few thousand boxes to over 300,000 boxes. Bob Kyff has over 25 years experience as an owner, operator and manager, and has overall responsibility for implementing new accounts at SMLDS.

SMLDS will make the first pickup from the current vendor within 1 day of the first 24 pallets being prepared for transport. SMLDS will use 24 ft. box trucks. Each truck will accommodate 12 pallets, 48 boxes per pallet, for a total of 576 boxes per truck. There are 23,527 standard letter/legal cartons, requiring 41 truck loads. The 15 Plan bags, 425 check boxes and 540 2 CF Plan boxes will require 3 truck loads. The 71 C-Bins will require 3 truck loads. This is a total of 47 truck loads, SMLDS will pickup two truck loads per day for 23 consecutive work days and one truck load on day 24. The schedule can be adjusted as necessary in order to meet the needs of the City.

Pallets will be created by stacking boxes in a configuration of 8 boxes per tier, 6 tiers high, as shown below. It is important that all barcode labels face the outside of the pallet. All pallets will be tightly stretch wrapped.



SMLDS will upload the current inventory data into the Records Management Software in electronic format. SMLDS will then verify each box against the inventory as it is received. SMLDS will use the following procedure to accomplish this task:

1. The SMLDS driver will count the number of pallets loaded on each truck and the number of boxes per pallet. This information along with the total box count per truck will be documented on the SMLDS Work Order.
2. The SMLDS driver will attach the pallet inventory lists provided by the current vendor to the Work Order.
3. As the pallets are unloaded from the truck, a temporary location will be assigned to each pallet. SMLDS will affix a new barcode label to each carton. The new barcode label and the barcode label from the previous vendor will then be scanned to the temporary location.
4. The scanned data is then uploaded into the Records Management Software and any errors as noted on the error report are corrected immediately.
5. Boxes are shelved to a permanent warehouse location and rescanned to the new location.

6. The permanent location data is uploaded into the Records Management Software and any errors as noted on the error report are corrected immediately.
7. The final inventory will contain the new SMLDS barcode number, the previous vendor's barcode number, and any descriptive information available from the electronic inventory. All of this information will be made available for on-line access with query capability.
8. The pallet sheets listing the boxes that are on each pallet will be scanned and the data OCR'd so that the complete list of boxes sent to SMLDS is available for future reference.
9. After all boxes have been relocated, SMLDS will produce two exception lists. The first will contain a list of boxes that are on the inventory provided by the current vendor that were not delivered to SMLDS. The second will contain a list of boxes delivered to SMLDS that are not on the inventory. SMLDS will work closely with City personnel to ensure that all discrepancies are properly resolved.
10. SMLDS will provide immediate access to all boxes once they are scanned at SMLDS's dock. By tracking the transmittal sheets provided by the current vendor, SMLDS will be able to verify whether or not a box has actually reached SMLDS's dock.

3.2 Document and Media Storage

SMLDS's record center is designed and constructed to the highest standards, meeting or exceeding the requirements of the NFPA, ANSI, AIIM and the State of Florida Public Records Storage Guidelines for Record Centers and Archives, Part 1, as well as other industry standards. The facility was constructed in 2006 and also meets the requirements of American Society of Engineers (A.S.C.E), 7-02 as adopted by the Florida Code. The facility has modern fire detection and suppression systems as well as security systems that include intrusion alarms, motion detectors and CCTV surveillance. These systems are monitored 24/7 by a central monitoring station and have automatic notification to police and fire departments.

The facility is used exclusively for records and media storage and utilizes commercial racking systems designed to handle all carton sizes. Climate controlled areas are constructed specifically for the storage of Micrographics and magnetic media, which are stored in separate areas with separate climate controls. Construction and climate specifications are maintained to strict tolerances in accordance with Industry standards, including NFPA 232 and State of Florida Administrative Code.

SMLDS's facility is located at 12200 NW 25TH Street, Miami, Florida 33182

and has a capacity for over 250,000 cartons and is currently 70% filled. There is sufficient capacity to accommodate the City's current inventory and any future growth.

Standard Operating Procedures are used to track records from initial pickup through destruction or permanent removal. All records are in-bounded immediately upon receipt and are shelved within 24 hours of receipt. Samples of these procedures are attached in Section 8.

SMLDS offers Andrews Software, Inc. (ASI) web based product for adding new cartons. This will eliminate transmittal forms and ensure proper coding and indexing of records.

3.3 Retrieval and Refiling

SMLDS provides on-demand, scheduled or emergency retrieval and refiling of boxes, files or documents. Records can be accessed by phone, fax or on-line. SMLDS also maintains an in-house imaging department that can scan-on-demand requested files and make the images available within two (2) hours of placing the request.

3.4 Courier

SMLDS provides for the pickup and delivery of records using a modern fleet of secure, climate controlled vehicles. Our drivers are subject to random state motor vehicle checks and drug screenings. A variety of delivery options are available that will insure your exact needs are met. A typical Courier Procedure that is followed for the pickup of records from a client is attached in Section 10.

3.5 Access Controls

SMLDS tracks the history of each box or file from initial receipt through final disposition. This allows you to determine when records were accessed and by whom. Access is restricted to authorized personnel only.

3.6 Destruction Services

When records reach the required retention period, SMLDS provides certified destruction services by either recycling, incineration or shredding. Once the retention schedule is entered into ASI, the software will automatically calculate destruction dates. A Disposition List, with attached Box Numbers, is created for all records eligible for destruction. This is performed in compliance with destruction policies. All records will be pulled, verified and destroyed within thirty (30) days of receipt of a letter authorizing the destruction. A Certificate of Destruction is issued within five (5) days following the destruction. Storage costs for all records identified for destruction will cease at the end of the current billing

period when the request is received. This will insure full compliance with State Statutes, HIPAA, Sarbanes-Oxley, etc. A history file of all records sent to storage is maintained in ASI. SMLDS's Destruction Procedure is attached in Section 8.

3.7 Special Searches

SMLDS Record Technicians are trained to serve the varying needs of our clients. This includes special requests to retrieve large quantities of records for onsite review by City personnel. SMLDS maintains a customer viewing room that will be made available on request at no cost to the City.

3.8 Computerized Inventory and Tracking System

SMLDS utilizes the ASI software developed by Andrews Software, Inc. This state-of-the-art software has complete record center functionality. SMLDS redundantly backs up all data daily both locally and remotely. The system uses bar code technology to track boxes, files and media. Fields can be customized to meet the City's needs.

With ASI, you can manage and track the items you store with SMLDS at your convenience from your own computer desktop. ASI allows you to:

- View inventory status
- Make service requests
- Monitor item movement
- Update information
- Obtain detailed reports
- Order supplies
- Perform administrative tasks

ASI also mirrors your organizational procedures. For example, it uses your identifiers to describe your items allowing you to easily search your inventory to find critical information. This allows organizing your inventory by department, business group, cost center, etc.

With password-protected security, ASI lets you easily issue service requests such as pickups and retrievals. The system asks you for all the necessary details needed to complete the transaction, and provides a confirmation.

All this is done mirroring your organizational procedures, using your identifiers to describe your items. This allows you to make service requests, order supplies, monitor item movements and receive detailed reports (including billing, inventory, items out reporting, destruction, activity and perm-out reports).

Key Features of ASI

- Comprehensive set of record series and record retention functions.
- Track and report destruction and expiration dates.

- Extensive import and export capabilities.
- Remote Access and Web Server module.
- Query builder with intuitive Boolean search capabilities.
- Global search and replace features.
- User configurable field lengths. This feature is designed to allow the program to be configured to meet the specific needs of the user.
- Complete departmental tracking and reporting.
- Efficient work order processing.
- Over 150 standard reports.
- Custom report and label generator.
- Multi-level inventory indexing and tracking. This feature lets you track containers and individual items stored in containers or on open shelf. Easy-to-use Windows Interface.
- Multiple searchable index fields for containers and files stored in containers or on open shelf. Customize index captions by item type, department or record series. These custom captions show on data entry screens, look up screens and on customer reports.
- Comprehensive bar code functionality. Add items, move items, check in items and check out items with a portable bar code scanner. The software also allows the user to download pick lists to the portable unit and verify items which are scheduled to be shipped or destroyed.

Detailed Reports

- Create as many customized versions of the standard reports as needed.
- The program features a wide variety of reports for management, customers, operations, work orders and accounting.
- The report menu offers a variety of reports that list inventory sorted by key fields.
- Retrieval reports showing all outstanding retrievals.
- Destruction reports showing all expired items.
- Management reports will print customer listings and labels, facility inventory by location and by customer, statistical reports of services performed by month, service code listings and listings of permanently removed containers and/or indexed items.
- Unlimited Report Groups to create and choose from.
- Multiple facility layout reports
- Multiple work order reports including: pick lists, put away lists and work order history reports.
- Custom reports can be created with Crystal Reports and can easily be added to the standard Total Re-call™ user interface.
- ASI features both query builders and query by example functionality.
- Multiple Query and/or Query By Example (QBE) result sets can be cumulated together.
- Query and/or QBE result sets can be exported to a wide range of standard file formats including Excel, ASCII and DBF.
- Query and/or QBE result sets can be printed. The user has the ability to select the fields which will print on the reports.

3.9 Imaging

SMLDS utilizes The DocStation™ process. In minutes it will turn paper into electronic archives that can be searched on a full text basis or through document attributes without the cost penalties normally associated with scanning, OCR processing and document indexing.

Most network-based imaging systems require the investment of personnel to manipulate and code the documents during the scanning process. The SMLDS system allows users to accurately access paper based documents with little labor investment. Documents can be searched, concepts extracted and retrieved for further exploration with comparatively lower cost in terms of personnel and infrastructure. All of the intermediary processes of image processing, OCR conversion, full-text indexing and database management are accomplished seamlessly, without any user intervention. The customer has no need to learn the challenges of setting up and managing these intermediary processes.

SMLDS offers low cost, ease of use, immediate availability and portability to markets that are paper intensive and where documents need to be shared on a global basis. Clients include Legal, Professional Services, and Government organizations and other work segments where accessibility to documents are of high value. Next generation products will allow seamless access to an organization's entire network for the retrieval and sharing of information from any location in the world.

Products

SMLDS utilizes a family of software products that operate seamlessly to provide for capture of unstructured data, with particular strengths in dealing with paper documents and rapid search and retrieval.

Document Station Imaging System

SMLDS systems include the following software components:

- **Image Capture**
- **Image Enhancement**
- **Barcode**
- **Optical Character Recognition**
- **Auto Rotation**
- **Full Text Indexing**
- **Search Engine:** Proprietary Retrieval Software allows End-User to search and retrieve image and text files using a variety of search methods.

Stand-Alone DocViewer:

Proprietary Viewing Software and the search capability described above is written to each CD ROM created by the Document Station. CDs can be duplicated and distributed without any additional fees to the user. The result is a digital archive that contains its own viewer and search capability and may be used on any PC without installation/licensing issues.

SMLDS's DocID™ :

Optional Software program which automatically extracts data from the scanned documents, creating database fields like Document Type, Date, Author, Recipient, Subject, and Names-In-Text.

Scanned and OCR'd documents can be characterized according to standard templates; for example, out of 1000 documents- 800 were letters, 150 were emails, 40 were contracts, and 10 were purchase orders. The user may establish custom queries as well.

Web Viewer

Optional Intranet version of the DocViewer software. This Intranet Server software (which may be installed as a stand-alone or incorporated into a hardware web-server upgrade) allows:

- *secure "on-line storage" of documents to be searched, document access is set by administrator*
- authorized users to search and browse the documents using only an Internet browser such as Netscape or Microsoft Explorer.*
- Users to retrieve, view and print through the Browser interface.*
- conversion of documents to .pdf format.*

3.10 Records Management Plan Project Approach

As an option **at no cost to the City**, SMLDS will prepare a Records Management Plan that clearly defines the policies and procedures that the City and SMLDS will follow to insure the program is legally and administratively compliant. A draft of the Plan will be submitted to the City for approval.

One of the most valuable assets owned by the City is its informational content contained within City Records. Employees are often described in this way, yet employees come and go - the records remain behind. Records are the most dependable memory, ensuring benefits and services, together with documenting significant Policy and Administrative direction. Further, creating and managing records is usually an entity's most expensive, (although rarely identified), budget component. SMLDS will take a *life cycle* approach to the development of a records management system.

The concept of a life cycle for records and information implies management from creation to final disposition, or permanent preservation. SMLDS will write a Plan that includes required Policies and Procedures for all City Records, regardless of media type, physical characteristics or means of transmission. SMLDS's Plan will address the entire life cycle. Successful management of records and information must include each aspect of the life cycle. These include:

1. control of record generation,
2. format and media selection,
3. storage and disaster recovery,
4. access and use,
5. retention, and
6. final disposition or preservation.

Utilizing a life cycle approach to records management will assist in the economical, efficient and integrated management of City Records.

To ignore records management or to allow an undisciplined and unregulated system to function invites disaster. Poor records management decisions may create an uncompetitive level of service, loss of time, and certainly represents a waste of precious resources. Such negligence may result in adverse references in litigation, criminal charges, civil charges or sanctions.

SMLDS's Records Management goals will include:

1. Retention and disposition of City Records in accordance with legal/business requirements;
2. Management access to both active and inactive records in an accurate and timely fashion (to include a filing *system* and consideration of imaging potential);
3. Retention of all records under secure conditions, preventing unauthorized access by both employees and third parties;
4. Protection of all records from physical calamity and decay;
5. Provision for the timely destruction of records at the end of their retention period in a secure manner;
6. Conversion of long term retention records to a media equal to the retention;
7. Provision for vital records protection, data processing and disaster recovery; and
8. Achievement of these goals in the most cost-efficient manner available.

Project staff will consist of Steve M. Lewis and Richard L. Ruck who will have all data collection and all data analysis responsibility. SMLDS expects that during the

Onsite visit:

- SMLDS will become familiar with City structure and operations.
- SMLDS will write an administrative policy that defines the purpose and scope of a Records Management Program for review and approval by City Management.
- Conduct staff interviews and on-site data collection.
- Begin writing retention schedules.
- Begin writing classification framework for City Records.
- Begin writing Comprehensive Records Management Plan.

Continuing offsite:

- Complete Record Disposition Lists and submit to City staff for review.
- Complete Comprehensive Records Management Plan and all deliverables and submit to City staff for review.
- SMLDS will remain available to discuss Retention Schedules, Comprehensive Records Management Plan and Procedures.

Traditional data collection and analysis techniques will be employed including but not limited to: on site interviews with all relevant staff; hands on evaluation/inventory of record collections; an evaluation of activity; review and analysis of existing policy and procedures including budgets and the existing electronic and physical infrastructure. In short, a thorough needs analysis of record management operations in each Department will be made resulting in a comprehensive narrative Records Management Policy. The Records Management Policy will include relevant data and narrative explanations; recommendations for all aspects of records management together with IT solution recommendations and an implementation plan. The Plan will include a list of published sources and specific recommendations for organizational structure and operations for the records program. The Records Management Policy will be media independent, including all record media throughout the City and address all life cycle issues and records management goals as follows:

1. Retention and disposition of City Records in accordance with legal/business requirements;
2. Management access to both active and inactive records in an accurate and timely fashion to include a filing system and consideration of imaging potential;
3. Retention of all records under secure conditions, preventing unauthorized access by both employees and third parties;

4. Protection of all records from physical calamity and decay;
5. Provision for the timely destruction of records at the end of their retention period in a secure manner;
6. Conversion of long term retention records to a media equal to the retention;
7. Provision for vital records protection, data processing and disaster recovery; and
8. Achievement of these goals in the most cost-efficient manner available.

SMLDS will, at a minimum, and with the City's approval, interview the following City Departments as part of this Phase:

- Building Services
- City Attorney's Office
- City Auditor's Office
- City Clerk's Office
- City Manager's Office
- Community Enhancement and Compliance
- Community Redevelopment Agency
- Emergency Management
- Executive Airport
- Finance
- Fire Rescue
- Geographic Information Systems
- Housing & Community Development
- Human Resources
- Information Technology Services
- Marine Facilities
- Parking
- Parks and Recreation
- Police
- Procurement Services
- Public Works
- Sustainability
- Sustainable Development
- Transportation and Mobility
- Urban Design & Planning

The IT solution recommendations will include the following specific system requirements:

- a. Data storage for production
- b. Data storage for retention
- c. Network hardware

- d. Services
- e. Scanners
- f. Shredders
- g. Document, imaging, records management software and equipment

Preparing the City

SMLDS will communicate to the City the changes to the City's Records Management Program. In coordination with the City, SMLDS will be responsible for presenting the program to the City and explaining the new policy and procedures. SMLDS will utilize one or more of the communication forms typically used in City (Email, Newsletters, Memorandums, etc.) to dispense information. SMLDS will be responsible for training City personnel in the new policy and processes. SMLDS will also develop and implement a communication and training plan for City.

A presentation to the City may include the following topics

- I. Information
 - A. Explosion
 - B. Regardless of Physical Characteristics
 - C. Most Valuable Asset
 - D. Memory
- II. Records Management
 - A. Purpose
 - 1. Systematic
 - 2. On-going
 - B. Function
 - 1. Life Cycle concept
 - 2. Private vs. Public role
- III. Public Records
 - A. Florida Statutes
 - B. Case Law
 - C. Attorney General Opinions (AGO)
- IV. Access
 - A. Legal Requirements
 - B. Fees
- V. Scheduling and Dispositioning
 - A. Missouri Administrative Rules
 - B. Record Series Title
 - C. Retention
 - 1. Administrative
 - 2. Legal
 - 3. Fiscal
 - 4. Historical
 - D. Agency wide Disposition List

E. Records Management Plan

Training

SMLDS will prepare a Training Manual for the City. The Training Manual that will be delivered will cover the following topics at a minimum and will be modified if necessary after discussion with City Management:

Public Records

- Drafts vs. Support Documents and Working Papers
- Public Documents, Blank (Unused) Forms, and Printed Material
- Life Cycle
- Goals

Categories

- Copy of Record vs. Duplicate Records
- Email

Disposition

- Destruction
- Disposition List
- Records Destruction Procedure
- Off-site Storage

Access

- Fees
- HIPAA
- Relevant Access Limitation

Records Management Policies and Procedures

Additionally, SMLDS will conduct a formal training session for City employees empowered with the task of maintaining the Records Management Program.

Filing Classification System

SMLDS will develop a detailed filing classification framework for existing City Records and a high level filing classification strategy for records yet to be created based on a logical evolution of record generation given the City's Business Model for Estate Development with a view towards file sharing and identification of all resources required, across all existing record media. By improving the document based management of the City's records, other solutions will be minimized.

Filing systems must address storage and retrieval. Commonly, companies emphasize storage devices and not retrieval. The most common arrangement is most often alphabetical subject while the most common equipment is vertical file cabinets followed by lateral file cabinets, both utilizing a drawer. Common to the

lateral file cabinets are hanging folders, together with manila folders. Collections so described are not economical or efficient.

Arrangement, equipment and supplies should be standardized. SMLDS may recommend a Modified Alpha-Numeric Mnemonic System (*Mnemonic*, which means helping, or meant to help, the memory). The key to the system is the coding. The file codes consist of a combination of letters and numbers representing a particular function linked electronically to a name field. The subjects are assigned file codes to facilitate classifying, sorting and filing. The coding system consists of a three-letter symbol (short title mnemonic symbol) for each major category. The codes also cross year lines. Use the same codes year after year. Use date labels to identify years. This same coding strategy, if recommended, crosses media types and lends itself to an IT solution, if required now or at some time in the future. Such a system, available on the network, standardizes nomenclature and allows for rapid retrieval regardless of naming biases in a manual or electronic environment.

Such a coding scheme allows for maximum flexibility and permits the addition of new symbols without changing symbols assigned to other subjects and without breaking the continuity of the pattern. Inventory data must be used to identify and therefore, code all record series titles. Codes must be maintained on PC to facilitate the inclusion of new codes and the printing of manuals. The system creates a cross index by subject and provides a measure of security. No index, no access. The system is driven by an application written using Microsoft Access. Color coded, self adhesive labels are used to create file labels. The color coding virtually eliminates misfiles.

SMLDS will likely recommend open shelf lateral filing equipment which is far superior in every way to standard vertical file cabinets as a means of providing access to hard copy files. A fewer number of open shelf units, on less floor space, for less initial equipment cost per cubic foot stored, will provide nearly twice the density of storage per square foot of floor space as compared to standard file cabinets. Further, color coded end tab filing will allow for enhanced systems designed to reduce misfiles, and speed retrieval and refiling activities.

Retention Schedules and Record Destruction

Scheduling is the heart of any proper Records Management Program and is necessary to establish timeframes for destruction and to identify records that must be preserved indefinitely. In order for the Records Program to be viable, **the scheduling process must be carefully documented and approved.** The **program must be systematic and comprehensive.** All records, regardless of media type or physical characteristics must be addressed by the Records Program. To selectively apply the program is to invite adverse reference in litigation, for example. The **program must also be developed during the normal course of business** - again, not developed for specific records for specific reasons. **The working papers used to develop the Program, and especially those used to develop the retention schedules must be maintained permanently.** Each retention schedule must be

approved and signed through a regular process.

As retention periods are met, the **records must be destroyed**. Again, the program must include all records and intent must be followed. Records may be maintained longer than approved retention schedules, however, for each such instance documentation should exist to justify not destroying records per existing retention schedules.

The City must maintain the program. **There must be ongoing program control. There must be a way to terminate all records destruction.** SMLDS will ensure these issues are addressed.

Retention schedules will include four basic values: administrative, legal, fiscal and historical. SMLDS will use the *Record Series Title* approach to scheduling - that is, record collections will be identified and scheduled together that relate to the same subject, form or activity. This will result in a fewer number of Schedules, making it easier for users to comply. Existing, Nationally published and well known retention requirements will be used. No effort will be made to conduct a thorough legal review of National Law or Case Law. Except for existing, published retention requirements, SMLDS will recommend Industry Standard, generally accepted record retentions. Staff interviews, hands on examination of record collections and standard inventory techniques will be employed. Data collected in this fashion will be core *identification* data used to write Retention Schedules.

Format, media type or duplication does not affect the public record status of information created or received by a public agency. The recommendations SMLDS will make apply to hardcopy as well as digital records, unless otherwise noted. Generally, the City should select media types for retention based on economy and efficiency, with lengthy retention implications in mind.

Digital Record and Email Solution

As defined by s. 119.011(12), F.S., "Public Records means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings or other material, regardless of physical form or characteristics or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency." Format, media type or duplication does not affect the public record status of information created or received by a public agency. The recommendations we make apply to hardcopy as well as digital records, unless otherwise noted. Generally, the City should select media types for retention based on economy and efficiency, with lengthy retention implications in mind.

Email often engenders considerable confusion relative to Public Records Law. Email questions have triggered interesting Attorney General Opinions addressing core issues related to email. Retentions are not written for media types. Email is a media type and has no specific retention. The retention for email is content driven. Retentions are written for informational content by record series title.

Some Email is *interoffice memoranda* and *correspondence*. Some Email (or more often attachments to email) may include record series titles with even greater retention. Most often, Email is a *transitory message* with an OSA (Retain until Obsolete, Superseded or Administrative Value is Lost) retention. Some email is personal and private.

The vast array of potential Record Series Titles reflected in the City's email database, each with a specific retention and further complicated by the designation of *copy of record* or *duplicate*, is an issue faced by every Florida Public Agency, and indeed; every entity across the United States. The solution SMLDS will propose is conditioned upon adherence to specific rules and the implementation of an email archiving application. Specifically, rules calculated to manage in a digital environment what for humans is an excessively temporal (therefore expensive) process replete with error potential. Our solution, if fully implemented, will provide for legally sufficient disposition without human intervention.

It is important to understand that the City's Records Management Program applies to all records, regardless of physical form, characteristics, or means of transmission, created or received by the Agency in connection with the transaction of official business. The City is charged with ensuring compliance with all relevant Florida Statutes and the Florida Administrative Code regarding access, the systematic retention, storage and disposition of all City records, including email.

Section 257.36(5), Florida Statutes (F.S.), directs each agency to establish and maintain an active and continuing records management program to include inventorying, scheduling and disposition of records. Public Records Law, Chapter 119, F.S., provides, in part, Agency obligations for the access, control, storage, preservation and disposition of all Public Records. Further, the Florida Supreme Court of Florida in *Shevin v. Byron, Harless, Schaffer, Reid and Associates, Inc.*, 379 So. 2d 633 (Fla. 1980), provides in part that a public record, for purposes of Chapter 119, "is any material prepared in connection with official agency business which is intended to perpetuate, communicate, or formalize knowledge of some type." The fact that information can be made or received electronically does not change the constitutional rule-mandated obligation of agencies and employees to direct and channel such official business information so that it can be properly recorded as a public record. Email records created or received in connection with the transaction of City business are Public Records. Our digital record recommendations and proposed email solution is legally compliant and exceeds the standard of care in the industry.

4. References

Reference 1

Company Name: The District School Board of Collier County, Florida
Contact Person: Donna Woods, Coordinator of Operations
Company Address: Dr. Martin Luther King, Jr. Administrative Building Room 3-203
5775 Osceola Trail
City, State, & Zip: Naples, FL 34109
Phone Number: (239) 377-0457
E-mail Address: woodsdo@collierschools.com
Term of Contract: From 2004 To Present

Product(s) or service(s) provide for this contract:

SMLDS has provided this client for approximately the past nine years with Records Management Services that includes a Plan, and on-going consulting/implementation services. Consulting services include writing policies and procedures and updating the records plan and providing training and technical assistance to staff. Implementation services include identification and destruction of records eligible for destruction and indexing services and coordination of other vendor related services to include imaging and off-site storage. SMLDS provided this client with an automated email solution. SMLDS also assisted this client in establishing policies and procedures for managing the District's digital records. Conversions were in accordance with Rule Chapters 1B-24 and 1B-26, F.A.C. SMLDS has assisted this client with the off site storage of inactive records, detailed indexing and the destruction of nearly 100 million pieces of paper and made significant improvements in nearly every aspect of data management. Their cost analysis discloses that for every dollar expended for our service they have experienced a cost avoidance of \$15.11.

Reference 2

Company Name: City of Key West
Contact Person: Cheri Smith, City Clerk
Company Address: 1300 White Street
City, State, & Zip: Key West, FL 33040
Phone Number: (813) 809-3831
E-mail Address: csmith@cityofkeywest-fl.gov
Term of Contract: From 2011 To Present
Product(s) or service(s) provide for this contract:

SMLDS wrote a comprehensive Records Management Plan in 2000. Implementation services included recommendations and establishing vendor(s) for off-site storage, microfilming services, digital imaging services, conversion of City Clerk files to an alpha-numeric code system word searchable and staff training together with on-going technical assistance to Plan implementation. SMLDS wrote an updated Plan in 2013, beginning a new phase of implementation services to include regular consulting and

staff training. These recent services has included significant indexing of records to file level for records with remaining retention and identification of records eligible for destruction resulting in attractive cost avoidance. The City has committed to implementing an email solution and has brought email back into the City from the cloud including a domain name change. Final implementation of email solution is pending exchange server update. The City's financial commitment to SMLDS is reaching the half million dollar mark.

Reference 3

Company Name: The City of Coral Gables
Contact Person: Billy Y. Urquia, City Clerk
Company Address: 405 Biltmore Way
City, State, & Zip Coral Gables, FL 33134
Phone Number: (305) 460-5207
E-mail Address: burquia@coralgables.com
Term of Contract: From 2002 To Present
Product(s) or service(s) provide for this contract:

SMLDS has provided this client for approximately the past eleven years with Records Management Services that includes a Plan, and on-going consulting/implementation services. Consulting services include writing policies and procedures and writing the records plan and providing training and technical assistance to staff. Implementation services include detailed indexing services, identification and destruction of records eligible for destruction and coordination of other vendor related services to include imaging and off-site storage. SMLDS provided this client with an automated email solution. SMLDS also established a program for the City's digital records, providing on-line access to public records. Conversions were in accordance with Rule Chapters 1B-24 and 1B-26, F.A.C. Since we began this project we have helped this client destroy 33,363,580 pieces of paper. Total cost avoidance for the entire project including disposition, off-site storage and improved processes and the email solution equals approximately \$3,307,761.50. Therefore, for roughly every consulting dollar spent on this project, the City has avoided approximately \$10.35.

5. Minority/women (M/WBE) Participation

SMLDS does not qualify as a Minority/women (M/WBE) business.

6. Subcontractors

SMLDS will not use any subcontractors if awarded this contract.

7.1 Proposal Certification

BID/PROPOSAL CERTIFICATION

Please Note: If responding to this solicitation through BidSync, the electronic version of the bid response will prevail, unless a paper version is clearly marked **by the bidder** in some manner to indicate that it will supplant the electronic version. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration)

Address:

City: State: Zip:

Telephone No. FAX No. Email:

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**):

Total Bid Discount (**section 1.05 of General Conditions**):

Does your firm qualify for MBE or WBE status (**section 1.09 of General Conditions**): MBE WBE

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>					

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. **If submitting your response electronically through BIDSUNC you must also click the "Take Exception" button.**

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Richard L. Ruck
Name (printed)



Digitally signed by Richard Ruck
DN: cn=Richard Ruck, o=City of Fort Lauderdale, ou=City of Fort Lauderdale, email=rruck@cityofftlauderdale.com, c=US
Date: 2019.04.03 18:01:45 -0400

Signature

March 30, 2019
Date:

Vice President

Title

7.2 Cost Proposal

City of Fort Lauderdale

Bid 12257-095

Item #	Description	Estimated Quantity	Unit Price	Unit	Total Annual Price	Notes / Variances
1	Initial Transfer Costs – New Contractor , per specs.	24,578	\$0.00	Ea.	\$ -	
2	Initial Transfer Costs – Current Contractor . Cost of providing assistance in records removal, per specs.	24,578	\$0.00	Ea.	\$ -	
3	Storage Cost per Standard Box – Monthly Cost for 23,527 boxes times 12 months = 282,324 to be used for an annual cost. Boxes are the standard size of 1.2 cubic feet.	282,324	\$0.15	Box	\$ 42,348.60	
4	Storage Cost per Plan Bag - Monthly Cost for 15 Bags times 12 months = 180 to be used for an annual cost. Bags are 2.4 cubic feet. Plastic Sealable Bag - 15" x 48"	180	\$0.30	Bag	\$ 54.00	
5	Storage Cost per Box (Check) , per specs. Monthly Cost for 425 check boxes times 12 months = 5,100 to be used for an annual cost. (24" x 9" x 4")	5,100	\$0.08	Box	\$ 408.00	
6	Storage Cost per Plan Box (Odd Sizes) , 10" x 10" x 36" or other odd sizes, per specs. Monthly Cost for 540 plan and odd size boxes times 12 months = 6,480 Boxes to be used for an annual cost. Plan boxes are 2.08 cubic feet.	6,480	\$0.22	Box	\$ 1,425.60	
7	Storage Cost per C-Bin -- Monthly Cost for 71 C-Bins times 12 months = 852 to be used for an annual cost. C-Bins are the standard size of 20.8 cubic feet.	852	\$2.70	Box	\$ 2,303.81	
8	Vault Storage - Cost to store City records in fireproof/waterproof vault. Unit cost per month times 12 mths.	12	\$0.50	Mths.	\$ 6.00	
9	Standard Retrieval – Cost of "standard" retrieval per box (any size) (24 hr.) per specs. Est. quantity includes box retrievals and returns. State any variation, if applicable, from City's "standard" definition.	1	\$1.50	Box	\$ 1.50	
10	Standard Retrieval — Cost of "standard" retrieval per rack/file from C-bin (24 hr.) per specs. Est. quantity includes rack/file retrievals and returns. State any variation, if applicable, from City's "standard" definition.	1	\$1.75	Ea.	\$ 1.75	
11	New Pickup for Storage – Cost to pick up new City records for storage, per specs, weekly, for various city locations. This includes plan boxes (10" x 10" x 36") & C-BINS (48"x30"x35").	1	\$1.50	Box	\$ 1.50	
12	Courier / Driver - Handling – Cost of handling city records (retrievals/returns) per box.	1	\$1.00	Box	\$ 1.00	
13	Reshelving – Cost of reshelving City records, per box.	1	\$1.50	Box	\$ 1.50	
14	Retrieval /Pickup /Re-Delivery – Cost of retrieval service/pickup and re-delivery by City employee, per specs.	1	\$1.50	Box	\$ 1.50	
15	Rush Retrieval – 4-6 Hours , Cost for same day retrieval (4-6 hours), per specs.	1	\$2.50	Box	\$ 2.50	
16	Record Destruction – Cost to destroy City records, all inclusive/per box, per specs.	1	\$2.50	Box	\$ 2.50	
17	Permanent Removal – Cost to permanently remove City records, including un-shelving the records, during the length of the contract and at the end of the contract.	1	\$2.00	Box	\$ 2.00	
18	Data Entry – New Contractor – Initial Move , Cost for data entry services, per box, per specs.	1	\$0.00	Box	\$ -	
19	Data Entry – All Contractors – After Initial Move, Cost for Data Entry Services, per box, per specs.	1	\$0.00	Box	\$ -	
20	Purchase Standard Storage Boxes – All in one or 2-piece, corrugated, banker storage box - 1.2 cubic foot, 12-1/2" x 10-1/2" x 16"	2000	\$2.60	Box	\$ 5,200.00	

21	Purchase Standard Storage Boxes with City Logo -- All in one or 2-piece, corrugated, banker storage box with 1-color City name and logo - 1.2 cubic foot, 12-1/2" x 10-1/2" x 16"	2000	\$2.80	Box	\$ 5,600.00	
22	Purchase Storage Boxes – C-Bin, 20.8 cubic feet, 48" x 30" x 35"	1	\$20.00	Box	\$ 20.00	
23	Purchase Storage Boxes – Plan Box, 2.08 cubic feet, 10" x 10" x 36"	1	\$3.25	Box	\$ 3.25	
24	Cost to Purchase Plan Bag -- Bags are 2.4 cubic feet. Plastic Sealable Bag - 15" x 48"	1	\$2.20	Bag	\$ 2.20	
25	Packing/Re-Packing – Initial Move – Cost for Contractor to provide packing/repacking services to City, per box, per specs.	1	\$3.50	Box	\$ 3.50	
26	Packing/ Re-packing – Other , Cost for Contractor to provide packing/repacking services to the City, per box, per specs.	1	\$3.50	Box	\$ 3.50	
27	Inventory – Initial Move , Cost for Contractor to provide assistance with inventorying City records, per box, per specs.	1	\$0.00	Box	\$ -	
28	Inventory – After Initial Move , Cost for Contractor to provide assistance with inventorying City records, per box, per specs.	1	\$3.00	Box	\$ 3.00	
29	Employee Access – Cost for City employees access/research at Contractors facility, per specs. If you have restrictions for this type of service, please provide details.	1	\$0.00	Ea.	\$ -	
30	Training – Cost for training City's Records Management Liaison and his/her designee, if applicable, in accessing Contractors online system.	1	\$0.00	Ea.	\$ -	
31	Trip Charge - Standard Delivery -- Cost of trip to City location for standard 24 hr. delivery per specs.	1	\$18.00	Ea.	\$ 18.00	
32	Trip Charge - RUSH Delivery -- Cost of trip to City location for RUSH, same day delivery per specs.	1	\$50.00	Ea.	\$ 50.00	
33	Storage Cost - Monthly Cost to store empty, unused, Standard Storage boxes, all in one or 2-piece, corrugated, banker storage box.	12	\$0.00	Mths.	\$ -	
34	Delivery of Empty Standard Storage Boxes -- Cost to deliver empty storage boxes (Line item 18/34) from storage on an as needed basis to City Employees, per	1	\$18.00	Ea.	\$ 18.00	
35	Write a complete Records Management Plan	1	\$0.00	Ea.	\$ -	At the request of the City
36	Additional Goods / Services 2	1	\$0.00	Ea.	\$ -	
37	Additional Goods / Services 3	1	\$0.00	Ea.		
TOTAL					\$ 57,483.21	

7.3 Non-Collusion Statement

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME

RELATIONSHIPS

-	
NONE	

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

7.4 Non-Discrimination Certification Form

CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH NON-DISCRIMINATION PROVISIONS OF THE CONTRACT

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-187(c), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

The Contractor shall not, in any of his/her/its activities, including employment, discriminate against any individual on the basis of race, color, national origin, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, or marital status.

1. The Contractor certifies and represents that he/she/it will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, as amended by Ordinance C-18-33 (collectively, "Section 2-187").
2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.



Digitally signed by Richard L. Ruck
DN: cn=Richard L. Ruck, o=City of Fort Lauderdale, email=rick@verizon.net, c=US
Date: 2019.04.01 18:02:25 -04'00'

Authorized Signature

Richard L. Ruck VP

Print Name and Title

March 30, 2019

Date

7.5 Local Business Preference (LBP)

LOCAL BUSINESS PRICE PREFERENCE

Section 2-199.2, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-12-04), provides for a local business preference.

In order to be considered for a local business preference, a bidder must include the Local Business Preference Certification Statement of this ITB, as applicable to the local business preference class claimed **at the time of bid submittal**:

Upon formal request of the City, based on the application of a Local Business Preference the Bidder shall within ten (10) calendar days submit the following documentation to the Local Business Preference Class claimed:

A) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **and**

B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the local business preference.

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:

https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodid=COOR_CH2AD_ARTVFI_DIV2PR_S2-186LOBUPRPR

Definitions: The term "Business" shall mean a person, firm, corporation or other business entity which is duly licensed and authorized to engage in a particular work in the State of Florida. Business shall be broken down into four (4) types of classes:

1. Class A Business – shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **and** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
2. Class B Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **or** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
3. Class C Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone **and** staffed with full-time employees within the limits of Broward County.
4. Class D Business – shall mean any Business that does not qualify as either a Class A, Class B, or Class C business.

LOCAL BUSINESS PRICE PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local business price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

(1)
Business Name

is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C -17-26, Sec.2 -186. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.

(2)
Business Name

is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2 -186. A copy of the Business Tax Receipt or a complete list of full -time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.

(3)
Business Name

is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.

(4)
Business Name

requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C -17-26, Sec.2 -186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.

(5)
Business Name

requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C -17-26, Sec.2 -186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.

(6)
Business Name

is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186 and does not qualify for Local Preference consideration.

BIDDER'S COMPANY:

AUTHORIZED COMPANY PERSON:

 Digitally signed by Richard Ruck
DN: cn=Richard Ruck, o, ou, email=rtruck@verizon.net, c=US
Date: 2019.04.01 18:03:01 -0400'

NAME

SIGNATURE

DATE



7.6 Contract Payment Method

CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City is transitioning from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale, to receive your payment fast and safely. No more waiting for checks to be printed and mailed.

In accordance with Article 7, item 7.6 of the contract, payments on this contract will be made utilizing the City's P-Card. Accordingly, bidders must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

Please indicate with which credit card you prefer to be paid:

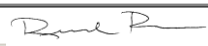
Master Card

Visa Card

Company Name:

SML Document Services, Inc.

Signature:

 Digitally signed by Richard Ruck
DN: cn=Richard Ruck, o=ou, email=riruck@verizon.net, c=US
Date: 2019.04.01 18:03:31 -0400

Print Name Title:

Richard L. Ruck VP

Attached is a sample of a Certificate of Insurance. If awarded this contract, SML will provide the City with a Certificate that meets all of the Insurance requirements of this RFP.



CERTIFICATE OF LIABILITY INSURANCE

DATE: MM/DD/YYYY
04/05/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<p>PRODUCER INSURANCE ICON, INC. 1128 S. WICKHAM ROAD WEST MELBOURNE FL 32904</p> <p>INSURED STEVE M. LEWIS, INC. SML, INC. PO Box 484 VERO BEACH FL 32961</p>	<p>TRACIE WOODS PHONE: INSURANCEICON@CFL.RR.COM FAX INSURANCE ICON, INC. C No: 2 2 7 0952 INSURER: HOUSTON CASUALTY INSURER 1: INSURER 2:</p>
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COVERAGES **CERTIFICATE NUMBER:** 20170207153639453 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE	POLICY EXPIRATION DATE	LIMITS	
				AMOUNT	DESCRIPTION
COMMERCIAL GENERAL LIABILITY CLAIMS-MADE OCCUR AGGREGATE LIMIT APPLICABLE PER POLICY OTHER AUTOMOBILE LIABILITY SCHEDULED	NN531362	03/04/2017	03/04/2018	EACH OCCURRENCE	\$ 1,000,000
				PERSONAL & ADV INJURY	\$ 1,000,000
				GENERAL AGGREGATE	\$ 2,000,000
				PRODUCTS-COMP. OPAGG	\$
ANY AUTO AUTOS ONLY AUTOS ONLY	01-CI-538725-60	01/15/2017	01/15/2018	80 DAILY INJURY (Per accident)	\$
				BODILY INJURY (Per person)	\$
				PROPERTY DAMAGE	\$
				EL EACH ACCIDENT	\$
UMBRELLA LIAB EXCESS LIAB RETENTIONS 1,000,000 WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER MEMBER EXCLUDED (Mandatory INNH)	MKLV20LE104373	03/04/2017	03/04/2018	EACH OCCURRENCE	\$ 2,000,000
				AGGREGATE	\$ 2,000,000
				EL EACH ACCIDENT	\$
				EL DISEASE-EMPLOYEE	\$
PROFESSIONAL LIABILITY DESCRIPTION OF OPERATIONS below	H715-106663	10/08/2016	10/08/2017	Errors and Omissions	\$1,000,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (ACORD 101, Additional Remarks Schedule, and Attachment 1 if required)

THE CITY OF ITS INDIVIDUAL TRUSTEES, OFFICERS, DIRECTORS, EMPLOYEES, AGENTS AND REPRESENTATIVE ARE INCLUDED AS ADDITIONAL INSURED AS RESPECT TO THE COMMERCIAL GENERAL LIABILITY AND EXCESS/UMBRELLA LIABILITY POLICIES UNLESS PRECLUDED BY LAW. ALL POLICIES WAIVE THE RIGHT TO RECOVERY OR SUBROGATION AGAINST THE CITY OF SARASOTA, ITS INDIVIDUAL TRUSTEES, OFFICERS, DIRECTORS, EMPLOYEES, AGENTS AND REPRESENTATIVES.
CONTRACT#

<p>CERTIFICATE HOLDER</p> <p>Additional Insured-Auto & General Liability</p> <p>Email: _____</p>	<p>CANCELLATION</p> <p>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DEVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</p> <p>AUTHORIZED REPRESENTATIVE</p> <p style="text-align: right;">Tracie Woods CAM # 19-0711 Exhibit 2 Page 39 of 60</p>
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A.M. Best Rating Services

Nautilus Insurance Company <1>

A.M. Best#: 001990 NAIC #: 17370 FEIN#: 860528184

Domiciliary Address
7233 East Butherus Drive
Scottsdale, AZ. 85260-2410
[United States](#)

Web: www.wrberkley.com

Phone: 480-951-0905

Fax: 480-281-0910

Financial Strength Rating



Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.

View additional [news, reports and](#) [Q.C.Q.I.Y.2lli](#) for this company.

Based on A.M. Best's analysis: [058496 - W.R. Berkley Corporation](#) is the AMB Ultimate Parent and identifies the topmost entity of the corporate structure. View a [Ust of operating insurance entities](#) in this structure.

Best's Credit Ratings

Financial Strength Rating [View Definition](#)

Rating:	A+ (Superior)
Affiliation Code:	r (Reinsured)
Financial Size Category:	XN (\$2 Billion or greater)
Outlook:	Stable
Action:	Affirmed
Effective Date:	February 26, 2016
Initial Rating Date:	June 30, 1986

Long-Term Issuer Credit Rating [View Definition](#)

Long-Term:	aa-
Outlook:	Stable
Action:	Affirmed
Effective Date:	February 26, 2016
Initial Rating Date:	June 22, 2005

u Denotes [Under Review Best's Rating](#)

Best's Credit Rating Analyst

Rating Issued by: A.M. Best Rating Services, Inc.

Director: Jennifer Marshall, CPCU, ARM

Senior Director: Michael J. Lagomarsino, CFA, FRM

Disclosure Information

View A.M. Best's [Rating Disclosure Form](#)

f.: [A.M. Best Affirms Ratings of W.R. Berkley Corporation and Its Subsidiaries: Assigns Rating to Subordinated Debentures](#)
February 26, 2016

Rating History

A.M. Best has provided ratings & analysis on this company since 1986.

Financial Strength Rating

Effective Date	Rating
2/26/2016	A+
1/22/2015	A+
12/13/2013	A+

7.8 RFP# 12257-095 - QUESTIONNAIRE

Name of proposing firm: SML Document Services Inc.

1. After Receipt of Order (ARO) how many days will it take to perform all services, including but not limited to providing inventory of the boxes to City, of the estimated 30,140.6 cubic feet of City records from the current Contractor's facility to your facility for storage?

30 /days /ARO

2. After City approval of the new contract, how many days will be required before you are able to begin the retrieval, return and destruction services required?

1 /days /ARO

3. As a part of the initial hand-off of the estimated 24,578 30,140.6 cubic feet of current City records, will your company incorporate the existing multiple numbering systems in your newly created numbering system?

Yes No

If no, how long before the new numbering system be ready for use? 1 /days

4. Provide the location/address of the facility at which these services will be performed, if different from your company address, as provided on the Bid/Proposal Signature Page.

12200 NW 25TH Street Suite 103, Miami, Florida 33182

5. Is the Contractor's storage facility where the City records will be stored located outside of a designated Hurricane Evacuation Area?

Yes No

6. Does the storage facility where the City records will be stored have a minimum of 37,400 cubic feet of records storage space available to accommodate the current and projected City's storage needs, while providing the same services under the same conditions?

Yes No

Note: 37,400 cubic feet is just a measure of total volume. It does not include the area around the boxes required by the State of Florida building code.

7. Does your company deliver and pick up records in closed and secured vehicles?

Yes No

8. Please indicate how your company prefers to receive orders/requests for box retrievals and or returns. (Examples: email orders, phone orders, etc.)

Online through web based software, email or phone.

9. What is the anticipated response time to a general customer service request via email?

Days 1 Hrs. _____ Minutes _____

10. What is the anticipated response time to a general customer service request via phone?

Days 1 Hrs. Minutes

11. Does your company provide internet access to check on box availability?

Yes No

If yes, does this system provide order request capabilities?

Yes No

12. Please check Yes or No to the below requirements for the Contractor's storage facility where the City records will be stored:

Security alarm system Yes No

Regular (once a month) Pest Control Services Yes No

In the records storage area City records will be stored no less than 2 feet above the floor. Yes No

Fire Extinguishers marked in accordance with Fire Department regulations throughout the facility. Yes No

Fire sprinkler system Yes No

Is your fire sprinkler system a wet or dry system Wet Dry

13. Is the Contractor's storage facility where the City records will be stored air-conditioned?

Yes No

If no, does your company offer other climate control options to preserve the City records in storage? Please specify.

NA

14. Please indicate the latest time (EST) your company will accept orders for standard retrievals and returns for next business day delivery by 3:30 pm? (Example: 4 pm is the latest time your company will accept orders for standard retrieval and return on one business day and 3:30 pm, is the latest time the next business day the City expect service.)

Orders received by 3:30 PM will be delivered the next business day

15. Does your company provide as standard services, delivery of new boxes, retrieval and return of boxes from the same location at the same date and time for one standard delivery charge? (Example: Two different recipients, in the same building, on different floors are charged with one standard delivery fee.)

Yes No

16. Scenario 1: The Sustainable Development Department has the Planning and Zoning Division and Code Enforcement Division located at the same address, 700 NW 19th

Avenue, but they are located in different parts of the building.

If both the Planning and Zoning Division and the Code Enforcement Division have deliveries scheduled for the same day and time would one Standard Retrieval charge be applicable or two?

One Two _____

17. Scenario 2: The Public Works Department is located at 100 N. Andrews Avenue, but they are located on both the 4th and 5th floors.

If Public Works requires having deliveries on both floors does your company charge one retrieval and/or pickup fee for delivery to one address even if there are separate orders for the same department on different floors of the same address?

Yes No _____

18. Scenario 3: The City Clerk’s Office and the Procurement Department are located at 100 N. Andrews Avenue, and they are located on two different floors.

Does your company charge one retrieval and/or pickup fee for delivery to one address even if more than one department has separate orders on different floors of the same address?

Yes No _____

Does your company request separate charges for each Department and/or floor of an address?

Yes _____ No

*Please note: Under variances in the Pricing Section if there is a fee for separate orders at the same address that are delivered on the same day.

19. This question is for all new Contractors.
If your Company is awarded the RFP please indicate how your company plans on moving the estimated 24,578 boxes of City records from the current facility where they are stored in West Palm Beach, Florida to your facility.

A Transition Plan is included in Section 3.1 of the Proposal.

20. This question is for the current Contractor.
Should a new Contractor be awarded the new contract please explain how your company plans to provide a seamless hand-off of the 24,578 boxes at the current facility including organized preparation of inventory for removal/pickup by awarded Contractor.

NA

21. Please indicate if your company has experience with a customer’s boxes that have multiple tracking numbers. Does your company enter multiple tracking numbers for a box and use all of the numbers for retrieval purposes based on the customer’s preference? Explain.

Typically, the SML bar code number is cross referenced to the current vendors bar code number as an alternate ID. Both fields are searchable. There are a number of user defined, searchable fields that can be used to track additional client defined numbers.

22. Provide your company’s procedures for on-site records destruction including timeline of

request to final destruction.


A typical client destruction procedure is included in the Proposal, Section 10. This also describes the typical time frames to complete destruction. This can be customized to meet the City's exact requirements.

23. Provide a sample copy of your company's monthly inventory report, transaction report and new box input report.
Sample reports are included in Section 9 of this response . All reports can be customized to meet the City's exact requirements.
24. Provide a sample of your company's invoice. A sample Invoice is attached in Section 9 of this response.
25. Provide a letter from a licensed architectural or engineering firm substantiating that the storage facility where the City records will be stored meets the requirements of American Society of Engineers (A.S.C.E), 7-02 as adopted by the Florida Code, for wind and resistive standards of building construction, with particular attention to the exterior walls and roof structure. The letter should substantiate that the Contractor's facility where the City records will be stored, is at the minimum, constructed to withstand category three-hurricane force wind and impact.

The proposer understands that the information contained in these proposal pages is to be relied upon by the City in awarding the proposed contract, and such information is warranted by the proposer to be true. The proposer agrees to furnish such additional information, prior to acceptance of any proposal relating to the qualifications of the proposer, as may be required by the City.

Please review the questionnaire to make sure all questions have been answered and all requested documents provided. Attach additional sheets if necessary. The City may deem your firm non-responsive for failure to provide all requested answers and documentation.

8. Samples of SMLDS's Standard Operating Procedures

<p>Preparing Cartons for Pickup</p>		<p>SML Document Services, Inc.</p>	
<p>Customer:</p> <ol style="list-style-type: none"> 1. Positioning Files in Standard Letter/Legal Storage Carton (measures approx. 10x12x15): <ol style="list-style-type: none"> 1.1. Letter size files are placed across the 12 inch width of the carton. 1.2. Legal size files are placed across the 15 inch width of the carton. 1.3. Loose documents are positioned in a similar manner. Standing the carton on end will allow stacking of documents. 2. Place a SML bar coded label on the 10 inch X 12 inch side of the carton underneath the handle cut out. Only one label should be applied per carton. 3. Create an inventory of the contents of each carton. This can be recorded on the Customer Inventory Form or entered directly into the database using Web Access. 4. Prepare a Customer Order Form or create a request on-line using the Web Access to schedule the pickup. Fax the form to (813) 247-5644. <p>SML Administration:</p> <ol style="list-style-type: none"> 5. Verifies receipt of the order and calls customer to schedule the pickup. 6. Creates a Work Order in SML's Records Management Software that shows the requested number of boxes and/or files to be picked up. 7. Sends the completed Work Order to the Operations Manager <p>SML Courier:</p> <ol style="list-style-type: none"> 8. SML courier arrives on the scheduled date and scans all cartons that are to be picked up. 9. A receipt with all of the boxes that were scanned is printed and attached to the Work Order. 10. SML Courier loads all boxes/files into the courier vehicle and returns to SML. <p>Document Center Operations:</p> <ol style="list-style-type: none"> 11. Unloads courier vehicle and scans all boxes/files to a temporary pallet location. 12. Scanner is uploaded into SML's Records Management Software and compared to the scan performed by the courier. Any exceptions appear on a report and the error is corrected immediately. 13. All boxes/files are shelved to a permanent location in the document center within 24 hours and the final location is uploaded into SML's Records Management Software. The number of boxes/files scanned to the permanent shelf location must equal the number scanned to the temporary pallet location, or an exception report is generated that is corrected immediately. 14. The work order is closed. 			
<p>SML OPERATING PROCEDURE OPS-202</p>	<p>PAGE : 1 OF 1</p>	<p>ISSUED: 1/15/2019</p>	<p>APPROVED: RLR</p>

Destruction of Client Records



**SML Document
Services, Inc.**

All requests for destruction of records stored in SML's Record Center are initiated by the Client. It is the Client's responsibility to notify SML when records are eligible for destruction. This procedure details the steps required to complete a destruction request.

Customer:

1. If SML's Records Management Program has eligible destruction dates in the Expired Date field, the Client can obtain a report that shows records that have exceeded their retention period. This report can be generated on-line through the Web Module, or by contacting SML to generate the report.
2. If SML's Records Management Program does not have eligible destruction dates in the Expired Date field, the Client can obtain a report that shows the description of the records. This report can be generated on-line through the Web Module, or by contacting SML to generate the report. Client then reviews the report and highlights the records to destroy.
3. If Client is maintaining this information in an internal database, the client prepares a list of records eligible for destruction and forwards the list to SML.
4. All requests must be accompanied with a letter authorizing the destruction of the records. Customer must specify the method by which the records are to be destroyed: shredding, recycling or incineration.

SML Administration:

1. Verifies receipt of the list with the customer.
2. Creates a Work Order in SML's Records Management Software and data enters the Barcode number for each record.
3. Creates a pull list which is sent to SML's Operations Department.

Record Center Operations:

1. Retrieves the eligible records from the storage location
2. The records are placed on pallets and staged for final verification.
3. Verification is completed by scanning all barcodes to the Work Order.
4. The scanner information is uploaded into the Records Management Program and an automated verification takes place. Any discrepancies show as errors during the upload process.
5. Discrepancies are researched and corrected immediately.
6. When all records have been staged, the Client is notified and asked if they would like to perform their own verification.

SML OPERATING PROCEDURE SOP-201

**PAGE:
1 of 2**

**ISSUED:
2/20/2019**

APPROVED: RLR



Record Center Operations (Cont'd):

7. If the Client desires to perform verification, the records are held in the staging area.
8. Once the verification process is complete, all records are released for destruction

Destruction Process

1. Following completion of the verification process, the records to be destroyed are loaded onto a SML vehicle and delivered to the appropriate facility for shredding, recycling or incineration.
2. During this process, a SML employee witnesses the destruction of the records.
3. At the request of the Client, the destruction process can be video taped.
4. Upon completion of the destruction process, SML issues a Certificate of Destruction that details all of the records that were destroyed.

Box Level Inventory Report

Customer Number	Customer Name	Department Number	Department Name	Box Bar Code	Box Status	Media Type	Warehouse Location	Received Date	Document Type	Review Date
2	ABC Company	7060	Accountng	306	I	1.2	A-10-SA-1-001	6/11/2012		12/31/2021
2	ABC Company	7060	Accountng	307	I	1.2	A-10-SA-1-001	6/11/2012		3/31/2019
2	ABC Company	7060	Accountng	308	I	1.2	A-10-SA-1-001	6/11/2012		4/30/2018
2	ABC Company	7060	Accountng	309	I	1.2	A-10-SA-1-001	6/12/2012		12/31/2021
2	ABC Company	7060	Accountng	310	I	1.2	A-10-SA-1-001	6/12/2012		12/31/2019
2	ABC Company	7060	Accountng	311	I	1.2	A-10-SA-1-001	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	312	I	1.2	A-10-SA-1-001	6/12/2012		12/31/2019
2	ABC Company	7060	Accountng	313	I	1.2	A-10-SA-1-001	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	314	I	1.2	A-10-SA-1-002	6/12/2012		12/31/2019
2	ABC Company	7060	Accountng	315	I	1.2	A-10-SA-1-002	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	316	I	1.2	A-10-SA-1-002	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	317	I	1.2	A-10-SA-1-002	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	318	I	1.2	A-00-SK-0-026	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	319	I	1.2	A-00-SK-0-026	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	320	I	1.2	A-00-SK-0-026	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	321	I	1.2	A-00-SK-0-026	6/12/2012		12/31/2019
2	ABC Company	7060	Accountng	322	I	1.2	A-10-SA-1-003	6/12/2012		3/31/2019
2	ABC Company	7060	Accountng	323	O	1.2		6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	324	I	1.2	A-10-SA-1-003	6/12/2012		6/30/2019
2	ABC Company	7060	Accountng	325	I	1.2	A-10-SA-1-003	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	326	I	1.2	A-10-SA-1-003	6/12/2012		12/31/2018
2	ABC Company	7060	Accountng	327	I	1.2	A-10-SA-1-003	6/12/2012		12/31/2019
2	ABC Company	7060	Accountng	328	I	1.2	A-10-SA-1-003	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	329	I	1.2	A-10-SA-1-003	6/12/2012		12/31/2021
2	ABC Company	7060	Accountng	330	I	1.2	A-10-SA-1-004	6/12/2012		2/28/2018
2	ABC Company	7060	Accountng	331	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2018
2	ABC Company	7060	Accountng	332	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	333	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2017
2	ABC Company	7060	Accountng	334	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	335	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	336	I	1.2	A-10-SA-1-004	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	337	O	1.2		6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	338	I	1.2	A-10-SA-1-005	6/12/2012		12/31/2020
2	ABC Company	7060	Accountng	339	I	1.2	A-10-SA-1-005	6/12/2012		12/31/2021
2	ABC Company	7060	Accountng	340	I	1.2	A-10-SA-1-005	6/12/2012		12/31/2021
2	ABC Company	7060	Accountng	341	I	1.2	A-10-SA-1-005	6/12/2012		12/31/2019

Box Level Inventory Report

Order Number	Box Description
37624	AP FILES - 2013
37624	CASH RECEIPTS - MARCH 2011
37624	CASH RECEIPTS & LOCK BOXES - APRIL 2011
37624	A/P - 2014
37624	CASH RECEIPTS & LOCK BOXES - OCT 2011 BOOK 12-15
37624	CASH RECEIPTS & LOCK BOX - FEB 2013, BOOKS 1 -3 JAN 2013 CASH RECEIPTS BOOK 16, S.H. FEB 2013 CASH RECEIPTS
37624	CASH RECEIPTS & LOCK BOX - DEC 2011 BOOK 11-15
37624	CASH RECEIPTS
37624	CASH RECEIPTS & LOCK BOX JULY - 2011 BOOK 6-9
37624	CASH RECEIPTS - MAY 2010
37624	PAYROLL - 2010
37624	A/P - 2010
37650	CASH RECEIPTS & LOCK BOXES - APRIL 2012 BOOKS 12-15
37650	CASH RECEIPTS & LOCK BOXES - DEC 2013 BOOKS 13-15
37650	2008 PUBLIC GOODS , 2010 AP FILES, 2009 A-M, 2011 RADIOLOGY
37650	CASH RECEIPTS & LOCK BOXES - OCT 2011 BOOK 1-6
37624	CASH RECEIPTS & LOCK BOXES - FEB 2011 BOOKS 1-5 (SH CASH RECEIPTS)
37637	JP MORGAN
37624	CASH RECEIPTS & LOCK BOOK - JUNE 2011
37624	OPERATING FUNDS J/E'S - JAN - SEPT 2010
37624	CASH RECEIPTS & LOCK BOXES - OCT 2011 BOOK 7-11
37624	CASH RECEIPTS & LOCK BOX - DEC 2011 BOOK 1-4
37624	A/P FILES - A-L, PEOPLE 2012
37624	CASH RECEIPTS - MARCH 2014
37624	CASH RECEIPTS & LOCK BOXES - FEB 2011 BOOKS 6-9
37624	CASH RECEIPTS & LOCK BOXES - APRIL 2011 BOOKS 1-5
37624	OPERATING FUNDS J/E'S OCT - DEC 2010, AUDIT 2009 (401K PENSION) 1099 (2009)
37624	FOUNDATION CASH RECEIPTS 2010, FOUNDATION J/E 2010, LEASING J/E 2010
37624	CASH RECEIPTS & LOCK BOXES - JULY 2013 BOOKS 6-11
37624	CASH RECEIPTS & LOCK BOXES - AUG 2013 BOOKS 9-13
37624	CASH RECEIPTS & LOCK BOXES - JULY & AUG 2013 BOOKS 17-18 (JULY), BOOKS 1-3 (AUG) SH CASH RECEIPT 2013
37637	CASH RECEIPTS & LOCK BOXES - DEC 2013 BOOKS 9-12
37624	CASH RECEIPTS & LOCK BOXES - MARCH 2013 BOOKS 10-15
37624	A/P FILES - 2013,
37624	ACCOUNTS PAYABLE F-L
37624	A/P - 2011, GL LABORATORIES - INSURANCE FUND

Box Level Inventory Report

Customer Box Number	Date Range From	Date Range To	Range From A	Contents Range To I	User-Defined Field 1	User-Defined Field 2	User-Defined Field 3	User-Defined Field 4	Extra Security	Security Hold
	2/25/2011	3/1/2011							False	
	4/12/2011	4/26/2011							False	
			CO	EM					False	
	10/26/2011	11/1/2011							False	
									False	
	5/1/2010	6/30/2010							False	
									False	
									False	
	4/25/2012	4/30/2012							False	
	12/27/2013	12/31/2013							False	
									False	
	10/1/2011	10/14/2011							False	
									False	
									False	
									False	
	10/17/2011	10/26/2011							False	
	12/1/2011	12/8/2011							False	
									False	
									False	
	2/15/2011	2/25/2011							False	
	4/1/2011	4/12/2011							False	
									False	
									False	
	7/11/2013	7/23/2013							False	
	8/19/2013	8/27/2013							False	
									False	
									False	
	12/18/2013	12/27/2013							False	
	3/20/2013	3/31/2013							False	
									False	
									False	
									False	

File Level Inventory Report

Customer	Department Number	Department Name	File Bar Code	File Status	Box Barcode	Customer Box Number	Warehouse Location	Media Type	Box Status
2	2745	Employee	*07090Z		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07091H		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07091X		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07091Z		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092A		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092B		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092C		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092E		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092K		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092R		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07092Y		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093A		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093C		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093H		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093I		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093O		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093P		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093R		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07093S		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07094H		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07094O		315		B-02-BD-2-009	1.2	
2	2745	Employee	*06979H		315		B-02-BD-2-009	1.2	
2	2745	Employee	*06979I		315		B-02-BD-2-009	1.2	
2	2745	Employee	*06979J		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07087Y		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07087Z		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07088D		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07088E		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07088X		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07088Z		315		B-02-BD-2-009	1.2	
2	2745	Employee	*07028N		315		B-02-BA-2-002	1.2	
2	2745	Employee	*07028P		324		B-02-BA-2-002	1.2	

File Level Inventory Report

Last Work Order	Customer File Number	File Description	User-Define Date	Review Date	User - Define Field 01	User -Define Field 02	Receive Date
0			9/9/2010		COLLAZO	CRISTOPER	3/3/2014
0			3/21/2011		COLLAZO	ANDREW	3/3/2014
0			8/24/2010		RODRIGUEZ	ITALO	3/3/2014
0			3/22/2011		ZHUNIO	NYELLE ROSE	3/3/2014
0			12/8/2012		LEON	ESAU	3/3/2014
0			10/5/2012		PANGOL	AALIYAH	3/3/2014
0			3/15/2013		MEDINA	ALEJANDRA	3/3/2014
0			4/4/2013		BERMEO	WESLEY	3/3/2014
0			10/17/2012		PIZARRO	GINA	3/3/2014
0			4/18/2013		ACEVEDO	JOSE	3/3/2014
0			8/1/2011		ACEVEDO	ANDY	3/3/2014
0			8/1/2010		SAGUAY	IVANA	3/3/2014
0			1/20/2014		OLOUGHLIN	JUSTIN	3/3/2014
0			4/19/2010		ORDONEZ	JUAN	3/3/2014
0			11/9/2012		NUNEZ	SUHEIDY	3/3/2014
0			1/4/2011		PAREDES	LIZAMARIE	3/3/2014
0			10/16/2010		ARPI	LUIS	3/3/2014
0			7/27/2014		PINTADO	MICHELLE	3/3/2014
0			12/6/2013		TAPIA	ISSAC	3/3/2014
0			10/24/2013		SANMARTIN	EMMANUEL	3/3/2014
0			9/13/2013		MARTINEZ	KATIE	3/3/2014
0			6/20/2013		MARTINEZ	KATIE	3/3/2014
0			10/23/2013		MAEJIA	PAMELA	3/3/2014
0			11/11/2013		JIMENEZ	KRISTIAN	3/3/2014
0			3/24/2011		JIMENEZ	PETER JOEL	3/3/2014
0			5/19/2013		ACEVEDO	JOSE	3/3/2014
0			5/29/2013		MONTELL	YESENIA	3/3/2014
0			11/27/2010		CAMPOS	SIRENA	3/3/2014
0			2/1/2014		CABRERA	PERDO	3/3/2014
0			1/4/2014		MARTINEZ	LUKAS	3/3/2014
0			9/9/2013		MARTINEZ	ASHTON	3/3/2014
0			4/20/2014		MARTINEZ	JAYDEN	3/3/2014

Invoice

SML Document Services, Inc.
P.O. Box 484
Vero Beach, Florida

Date	Invoice#
3/1/2019	0002499

Bill To
ABC Company Jennifer Jones 430 Conunerce Blvd Carlstadt,NJ 07621

P.O. No.	Terms	Project

Quantity	Description	Rate	Amount
93.75	STANDARD BOX 1.2 CF	0.21	19.69
	Minimum Retention	45.31	45.31
2	STANDARD TRIP CHARGE	30.00	60.00
10	OVER THE BOX	2.00	20.00
5	STAI"JDARD BOX REFfLE	2.50	12.50
	Sales Tax	6.48	6.48
		Total	\$163.98

SML Document Services, Inc.
P.O. Box 484
Vero Beach, Florida

Attn: Jennifer Jones
ABC Company
430 Commerce Blvd
Carlstadt, NJ 07621

00002 Main Level
Invoice No.: 0002499
Invoice Date: 03/01/2019
Order No.:
Terms: NET30
Printing: 03/28/2019 # 1

	<u>A m o u n t</u>	<u>Tax</u>	<u>Su b t</u>
!Full Retention: !03/01/2019 - 03/31/2019	18.90	0.00	18.90
!New Retention: !02/01/2019 - 02/28/2019	0.00	0.00	0.00
		Minimum Billing:!	65.00
		Total Retention:!	65.00
!s_e_r_v_i_c_e_s:! !0210112019 - 02/28/2019	92.50	6.48	98.98
		Total Services:!	98.98
PLEASE PAY THIS AMOUNT-- -->			<u>\$163.981</u>

Please return REMITTANCE page with payment. Thank You!

SML Document Services, Inc.

REMITTANCE

Attn: Jennifer Jones
 ABC Company
 430 Commerce Blvd
 Carlstadt, NJ 07621

00002 Main Level
Invoice No.: 0002499
Invoice Date: 03/01/2019
Order No.:
Terms: NET 30
Printing: 03/28/2019 #1

	<u>A_m_o_u_n_t</u>	<u>T_a_x</u>	<u>Subtotal</u>
Full Retention: 03/01/2019 - 03/31/2019	18.90	0.00	18.90
New Retention: 02/01/2019 - 02/28/2019	0.00	0.00	0.00
		<u>Minimum Billing:</u>	65.00
		<u>Total Retention:</u>	65.00
<u>Services:</u> 02/01/2019 - 02/28/2019	92.50	6.48	98.98
		<u>Total Services:</u>	98.98
PLEASE PAY THIS AMOUNT---- ->			<u>\$163.98</u>

Please return REMITTANCE page with payment. Thank You!

SML Document Services, Inc.
Invoicing Service Code/Retention Summary

03/28/2019 12:14 PM

Invoice Date: 03/01/ 019

Page 1

Customer	00002	ABC COMPANY			Invoice	0002499
			IQty Units	Cubic Units	Tax	Amount
<i>Services</i>						
10	STANDARD TRIP CHARGE		2.00	0.00	4.20	60.00
10	OVER THE BOX		10.00	0.00	1.40	20.00
20	STANDARD BOX RETRIEVAL		5.00	0.00	0.00	0.00
23	STANDARD BOX REFILE		5.00	0.00	0.88	12.50
Services Subtotal:					6.48	92.50
<i>Full Retention</i>						
**	CUBIC RETENTION		0.00	90.00	0.00	18.90
SB	STANDARD BOX		75.00	90.00	0.00	0.00
Full Retention Subtotal:					0.00	18.90
SUBTOTAL CUSTOMER NO.: 00002		ABC COMPANY TOTAL:			6.48	111.40
TOTAL CUSTOMER NO.: 00002		ABC COMPANY TOTAL:				117.88

*** Grand Total does not reflect any Minimum Billing or Discounts that may have been applied

SML Document Services, Inc.

Invoicing Work Order Summary Report by Work Order

03/28/2019 12:14 PM

Invoice Date: 03/01/2019 Invoice No.: 0002499

Page 1

Work Order No.: N039143 Date: 02/14/2019

Media Type	Rate	Qty	Units	Cubic Units	Amount	Tax	Service Total
00002-0000000000000000 ABC Company							
10-STANDARD TRIP	30.0000	1.000		0.000	30.00	2.10	32.10
OVER THE BOX	2.0000	5.000		0.000	10.00	0.70	10.70
20-STANDARD BOX	0.0000	5.000		0.000	0.00	0.00	0.00
ABC Company	Department Totals:				40.00	2.80	42.80
Work Order Totals:					40.00	2.80	42.80

Work Order No.: N039144 Date: 02/25/2019

Media Type	Rate	Qty	Units	Cubic Units	Amount	Tax	Service Total
00002-0000000000000000 ABC Company							
10-STANDARD TRIP	30.0000	1.000		0.000	30.00	2.10	32.10
OVER THE BOX	2.0000	5.000		0.000	10.00	0.70	10.70
23-STANDARD BOX	2.5000	5.000		0.000	12.50	0.88	13.38
ABC Company	Department Totals:				52.50	3.68	56.18
Work Order Totals:					52.50	3.68	56.18

Work Order Grand Totals: 92.50 6.48 98.98

ORIGINAL

SML Document Services, Inc.
P.O. Box 484
Vero Beach, Florida

Delivery Charge:
Standard

New

|||||
N039143

Customer No.: 00002

ABC Company

01:NO ROUTE

Bill To
ABC Company
430 Commerce Blvd
Carlstadt NJ 07621
Tel. 973-925-8300

Ship To
430 Commerce Blvd
Carlstadt NJ 07621
Tel. 973-925-8300

Mail Stop:

||||| 000019

Requester: Jennifer Jones
973-925-8300

Order Taken by: Kim

Received: 02/13/2019 12:00:00 AM

Due Date : 02/14/2019

Det: 0000000000000000

Name: ABC Com an

Service: 20: STANDARD BOX RETRIEVAL

TOTAL BOXES: 5

Box Barcode	Location	Customer Box No.
00000309	A-10-SA-1-001	
00000310	A-10-SA-1-001	
00000311	A-10-SA-1-001	
00000312	A-10-SA-1-001	
00000313	A-10-SA-1-001	

Courier _____

Customer _____

Date/Time _____

SERVICES:

STANDARD BOX RETRIEVAL

5

SML Document Services, Inc.
Invoicing Departmental Summary

03/28/2019 12:14 PM -

Invoice Date: 03/01/2019

Page 1

customer No.:	00002	ABC COMPANY	invoice No.:	0002499
---------------	-------	--------------------	--------------	----------------

		Retention		Service		
Department No.	Department Description	Amount	Tax	Amount	Tax	
0000000000000000	ABC Company	18.90	0.00	92.50	6.48	117.88
<u>Total Account:!</u>		18.90	0.00	92.50	6.48	117.88