RECORDS CLEANOUT HANDOFF / 01

MAP AUTHORITY AND CLEANOUT BATCHES

Use neutral labels. Keep names, record contents, account numbers, credentials and device identifiers outside.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Authorized retention decision owner / role only

Batch A / record category and approximate unit only

Location A / neutral area label only

Media A / broad media type only

Hold, exclusion or uncertain batch / label only

Approved-release evidence / secure source label only

Preparation only. Not records-retention, legal-hold, privacy, consumer-report, regulatory, cybersecurity, media-sanitization, destruction-method, chain-of-custody, certificate, contract or legal advice. Keep record contents, identifiers, credentials, device details and sensitive locations out.

RECORDS CLEANOUT HANDOFF / 02

DEFINE CUSTODY AND DESTRUCTION HANDOFFS

The organization and qualified advisers decide what may be released and which controls apply.

Container supply, control, seal and access ownership

Collection, loading, transport and receipt handoffs

Provider-stated destruction or sanitization method / no selection

Paper, media and mixed-material separation responsibility

Exception, rejection, quarantine and escalation process

Batch reconciliation, completion evidence and unresolved-item handoff

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RECORDS CLEANOUT HANDOFF / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not authorize destruction or decide retention, legal hold or method.

- [ ] Every provider receives the same Batch A brief
- [ ] Record contents and identifiers stay out
- [ ] Retention and legal-hold decisions have an authorized owner
- [ ] Release, hold, exclusion and uncertain batches are separate
- [ ] Container and custody responsibilities are written
- [ ] Material and method questions have qualified owners
- [ ] Exceptions and rejected items have an isolation route
- [ ] Reconciliation and completion evidence are defined

Open retention, hold or authorized-release question

Unassigned custody, method-confirmation or exception owner

Missing reconciliation, evidence or unresolved-item detail

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RECORDS CLEANOUT HANDOFF / 04

QUESTIONS FOR THE DOCUMENT-DESTRUCTION PROVIDER

Record the answer and where it appears in the proposal, service record or completion handoff.

Authority: what release evidence is required for Batch A?

Custody: who controls containers, access, loading and receipt?

Materials: how are types separated without exposing contents?

Exceptions: how are holds, mixed items and rejections handled?

Method: who confirms the applicable destruction or sanitization method?

Evidence: what reconciliation, completion and unresolved records return?

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RECORDS CLEANOUT HANDOFF / 05

COMPARE THE SAME BATCH A BRIEF

Use Provider A and B. Clarify unlike custody or completion assumptions before comparing proposals.

Provider A / B / proposal dates / shared Batch A brief

Release gates, containers, collection and custody - A / B

Provider-stated methods, material handling and exceptions - A / B

Reconciliation, evidence, unresolved items, exclusions and terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Document Shredding request. Share the same non-sensitive Batch A brief so participating pros can compete with proposals. Compare authorized-release gates, containers, collection, custody, provider method statements, exception handling, reconciliation, completion records, exclusions and fit. Private retention, legal-hold, privacy, security and qualified-provider review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. Private retention, legal-hold, privacy, security and qualified-provider review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/document-shredding/records-cleanouts

FTC: Protecting Personal Information - A Guide for Business (official reference)

FTC: Disposal Rule Guidance (official reference)

NIST SP 800-88 Rev. 2: Guidelines for Media Sanitization (official reference)

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