

Better Access — Complete Control



Why Morgan Records?

LOCAL OWNERSHIP AND MANAGEMENT

Our success depends on our quality of service and our ability to respond to your needs.

QUICK, SIMPLE, SECURE ONLINE ACCESS

Requesting deliveries, producing reports, and creating new records has never been more convenient or secure.

SIMPLIFIED RECORDS DELIVERY THROUGH SCAN-ON-DEMAND

Our state-of-the-art electronic records delivery process means that you have the records you need quicker and with less expense.

NO PERMANENT REMOVAL FEES

Your records belong to you. We never penalize our clients for removing records permanently from our storage facilities.

NO SENSELESS "ADMINISTRATIVE" OR "SERVICE" CHARGES

We only charge for the work we do for our clients. It's that simple.

**GUARANTEED TO LOWER YOUR OVERALL
RECORDS MANAGEMENT COSTS! SAY GOODBYE
TO HIGH-COST AND HIGH-MAINTENANCE.
WELCOME TO MORGAN!**

Why Records Management?

STORAGE IS ABOUT SECURITY, ACCESSIBILITY, AND VALUE

Whether you're in the medical support and healthcare industries, real estate, law or education fields, Morgan Records Management has the storage plan that is right for you. Records are the life blood of business, and moving your records off site provides the following benefits:

SECURITY

Store your legacy and active business records in a secure, monitored, video surveyed facility.

SPACE

Don't pay \$10 per square foot or more to store your records on site when you can utilize that same space more productively, efficiently and profitably with an off-site solution.

CONTROLLED ACCESS

Our process provides a built-in audit trail so you always know where to find your vital business records. Know where all your files are at all times, and control who has access to them.

LEGAL AND REGULATORY COMPLIANCE

Rest assured your business is in compliance with HIPAA, Sarbanes-Oxley, FACTA and other government and tax regulations.

LONGEVITY

Your records are stored in a clean, climate-controlled, pest-free environment. They won't be gathering mildew in a basement or decaying in an attic.

Together these benefits add up to cost savings and peace of mind, allowing your organization to focus on its core competencies and increase its organizational effectiveness. Knowing your files are safe and secure until you need them is good for any business.



Stuck in a contract and want out? Let Morgan help! We have assisted many clients get out of contracts and save them time and money while giving top shelf customer service.

Come see what the Morgan Records difference feels like!

MORGAN RECORDS MANAGEMENT GUARANTEES TO BEAT ANY COMPETITOR'S OFFER ON ANY SERVICE BY AT LEAST 10%.

- Morgan Records Management will guarantee our price for 90 days after reaching an agreement.
- We guarantee our pricing in writing upfront.
- We guarantee our pricing for 90 days after reaching an agreement.

NO ONE BUT MORGAN.

Still trying to figure out what is the best course of action to take with respect to your records? We know it can seem like a daunting decision, and that is why we want to offer you a free trial with Morgan Records.

- 1) Store your records with us in our records center and use our scan-on-demand to retrieve files you need when you need them. The cost benefit is such that this is what we recommend. If you decide after storing your records that you would rather just have them all scanned we can...
- 2) Scan everything all at once or over a period of time, and we will guarantee upfront we will scan them for you at the lowest price. If you decide you don't want to store or scan your records with us, we will return all of your records to you, and put them back right where we found them at no cost to you!

Save time, space and money with Morgan Records

Storage is about security, accessibility and value.

Records Storage

Scan On Demand

Lower your costs for retrieval and delivery.

Our web interface represents the fastest and easiest access to your entire archived or remotely stored inventory.

Web Management

Document Imaging

Convert your documents from hard copy to a digital format that you can easily access online.

Destroy your obsolete records professionally and confidentially.

Document Destruction

THE ADVANTAGES OF CONNECTIVITY TO ALL YOUR DOCUMENTS AND TAPES

The ultimate in connectivity, with ActiveWeb you're on top of every file. No matter the type – physical or electronic, imaged or email – you know where it is, who had it last, and what changes were made to it. Morgan Records ActiveWeb universally connects everyone to all information assets, regardless of location, in real time. Welcome to a whole new world of document management, where searching, tracking, ordering and delivering documents is a breeze.

- Complete web-based document management system
- Version control retains and identifies document changes
- Manage documents and/or tapes throughout their lifecycle
- Track and order documents and/or tapes on and offsite
- Create and save customized reports
- Easily deployed and requires minimal training or tech support
- Create multiple security levels and group access rights
- Customize and define data fields
- Scan, index, OCR, save, store and view all images
- Perform full text searches on all electronic documents, data and note fields
- Know the status of items stored anywhere
- Quick and immediate access to all imaged documents and/or tapes
- Easy to use "shopping cart" ordering process
- Immediate order confirmation or item location
- Unique and intelligent bar code system

LEARN MORE AT WWW.MORGANRM.COM



The ultimate in connectivity – with ActiveWeb, you're on top of every file.

Morgan Records partners with Cintas® and DocuData

This partnership helps our clients meet all document management goals including but not limited to:

- Secure onsite documentation destruction
- Secure onsite hard drive destruction
- Secure document storage
- Secure offsite document destruction
- Online compliance training courses
- Document scanning



A TOTAL RECORDS MANAGEMENT SOURCE PARTNERSHIP

Scan On Demand

1

NEEDS/RISK ASSESSMENT
Determine size and placement of Secure Destruction Stations.

Document Imaging

4

RECYCLE
All shredded documents are recycled and turned into various paper products.

CINTAS AND MORGAN RECORDS

2

SECURE COLLECTION
Secure Destruction Stations are serviced on a regular schedule.

Records Storage

3

SECURE DESTRUCTION
Documents are destroyed onsite or securely transported back to the Cintas facility for destruction. Certificate of Destruction is issued as proof of service.

Web Management



DocuData is committed to providing information management software solutions for document storage providers and small to mid-size businesses and organizations to assist them in storing, organizing, accessing, and tracking record data. The company's goal is to provide record centers, their clients, and stand-alone businesses with direct access to the information they manage along with total control over their operations, empowering them to take control of their corporate information assets. DocuData strives to provide record management solutions that are responsive to the needs of record centers and businesses and superior to any other available solution.

DocuData Software Inc. was created in 2000 by the record center specialists at Docu-Depot, a privately owned and operated commercial record center facility. Initially founded in response to Docu-Depot's need for a streamlined effective records inventory control and management software. DocuData is the only record center software company founded by a record center which is still managing a record center. This offers DocuData a unique insight into the issues faced by record centers and the solutions necessary to address record control and management needs in a changing marketplace. Combined with the company's focus on innovating and enhancing record and document management, DocuData's solutions benefit from continuous improvements and enhanced product functionality.

While initially created to provide solutions to the record center industry, DocuData has since developed a web application called EDC ActiveWeb™ and a new software application, EDC ActiveFile™, to do much more. Both were designed for record center customers to easily share electronic data regarding their documents with record centers. ActiveFile™ has since been developed into an ideal standalone solution for small- to mid-size businesses or government agencies to electronically manage their own records internally or off site.

EDC ACTIVEWEB

EDC ActiveWeb is an easy to use web application that allows online access to users of the EDC RC Software to manage entire catalogs of information, including imaged documents, off site records, and back-up tapes, easily and with minimal effort. It offers record center customers and employees the ability to access and manage their information remotely. The online access offered by EDC ActiveWeb™ eliminates the need for a middleman to process phone or faxed orders as users can access all documents that are electronically indexed in EDC RC Software.

EDC ACTIVEFILE SOFTWARE

EDC ActiveFile Software is a record management solution for businesses or organizations who want a user friendly, efficient solution to image, order, and track their information throughout its lifecycle. It is designed for use with both physical and electronic documents and is ideal for managing proprietary documents and records in a file room or office. The program can also be seamlessly linked to an offsite commercial record storage center. ActiveFile™ includes a web component which allows employees to access and manage documents, create orders, add files or boxes, view images or box/file details, and print labels remotely.

PRODUCT ACCESSORIES

Product Accessories are available for purchase directly from DocuData. As a convenience to our EDC Software customers and the general public, we have small quantities of these products available. These products can help in the daily operations of running a record center and with records management in and around an office. DocuData is acting solely as a reseller of these products and makes no warranties or guarantees with respect to these products or assumes any liability as a result of using these products.

FEATURES

The ultimate in connectivity, with ActiveWeb you're on top of every file. No matter the type, physical or electronic, imaged or email, you know where it is, who had it last, and what changes were made to it. MIRM ActiveWeb universally connects everyone to all your information assets, regardless of location, in real time. Welcome to a whole new world of document management, where searching, tracking, ordering, and delivering documents is a breeze.

- Complete web-based management system
- Version control retains and identifies changes
- Manage documents throughout their lifecycle
- Track and order documents on and off site
- Create and save customized reports
- Easily deployed and requires minimal training or tech support
- Create multiple security levels and group access rights
- Customize and define data fields
- Integrates with Microsoft Office
- Create multiple security levels and group
- Quick access to all imaged documents
- Easy-to-use "shopping cart" ordering process
- Immediate order confirmation or item location
- Unique and intelligent bar code system
- Single platform to manage all documents
- Scan, index, OCR, save, store and view all images
- Perform full text searches on all electronic documents, data and note fields
- Know the status of items stored anywhere
- View a complete audit history of all "touches"

Managing business information



ARE YOU SUFFERING FROM TOO MUCH INFORMATION?

Your answers to five questions will point you in the right direction.

These days, many of us suffer from TMI – Too Much Information – the tide of paperwork that flows into our mailboxes, computers, fax machines, and smartphones. It's even worse if you can't find an important document when you need it.

If you've ever spent time searching for a lost document – and fretted, knowing there were plenty of other things you should be doing. It's time to deal with your TMI problem. Here are five simple questions to help you begin.

1. WHAT DO YOU HAVE?

Start by determining what kind of paper records do you have (managing electronic records is another ball of wax). They are customer, and accounting records, internal policies and procedures, public relations and marketing materials. How much of this material are you actually using? Typically, 80% of a company's records are inactive, older material you may never need to access again. It's the newer, active records that you want to manage most efficiently. The rest should be identified, indexed, and securely stored. Which brings us to the next question.

2. WHERE IS IT LOCATED?

Are your records in cabinets, stuffed into a closet, or perhaps in a dedicated room? Some companies feel records are safe when hidden away in a basement or a garage. The environment of the storage space can destroy important records; traditional basements or garages suffer from dirt floors with mold, mildew, and possible water seepage.

Who has access to the storage space? Sadly, many companies have no access controls to their records whatsoever. Employees from other departments, companies with whom you share space with, visitors, or even random strangers may have access to them. These days, privacy concerns are paramount, and you need to consider how secure your records are. (Most information breaches occur from within the company, from a person who knows what's in the records).

3. HOW DO YOU FIND IT?

Suppose a sudden need arises for a document. Do you know where it is? If not, how long will it take to find it? Ideally, you should be able to track your records the same way that FedEx® tracks your packages, so that you always know where they are, where they came from, and who has them now.

Efficiency experts tell us that productivity goes down as clutter increases. Having a well-organized records management system will boost productivity, and there are few things more frustrating than wasting time searching for something you know should be there but isn't.

4. WHEN AND HOW DO YOU GET RID OF IT?

How long do you keep records? Failing to maintain proper records can lower your standing with industry organizations and even result in fines from the state or federal government. Every company should have a formal policy for document retention, and follow it. You must be able to prove that you are acted prudently, which means knowing the regulations about record keeping in your industry and your type of records.

What do you do when it's time to weed out old records? Depending on your business, your company can be heavily fined if you don't properly dispose of your records. For example, using a strip-cut shredder generally isn't enough, since a determined data thief could put those strips back together again. A cross-cut or confetti shredder is the minimum for secure shredding.

In most cases you should hire an outside disposal company to properly dispose of your records. Whoever you choose, don't trust a guy who shows up with a van marked "Fred's Shred Fast" there's no telling where those shreds will end up. Make sure to get a certificate of destruction that is notarized, which makes the disposal company liable for the appropriate destruction of the records.

5. WHAT'S IT COSTING YOU?

Finally, do you know how much you're spending on managing your records? Or not managing them, as the case may be. What are the costs?

- the cost of the space where the records are stored
- the time spent looking for documents
- lost productivity from employees dealing with an inefficient records system
- the cost of any compliance fines
- time spent preparing for audits (If your records are in order, it will take less time to prepare for an audit).

Why scan yourself when Morgan can do it for less?

Let Morgan Records show you how outsourcing your document scanning can save your time and money and make sure it's done right the first time.

The major issue is time and cost. Generally, the cost of scanning all of your paper files and capturing them electronically is simply too expensive. This is because of the manual nature of the record preparation involved in scanning. When scanning records, there can be no paperclips, staples or other document binders present or the scanning machine might jam or break. In addition, there is a quality-control element involved that requires human approval. An image of a contract had better be crystal-clear so that it will be easily printed and read long into the future. Another manual process that is often overlooked is the keying in of data with which one might identify or index the image in the future when retrieval becomes necessary. These three elements, to say nothing of the storage and maintenance needs of the electronic file over time, are usually cost-prohibitive for a company to engage fully in a PET (paper-to-electronic transition) program.



Scanning technology and equipment is improving all the time. OCR (optical character recognition), quality control, and document recognition capabilities in image-capture software have come a long way in the last several years, allowing many companies to begin laying the foundations of making this transition at a lower cost, perhaps over an extended period of time.

SCAN ON DEMAND

Scan-On-Demand (Electronic Records Delivery) is essential for clients who have multiple locations, have imaging needs, and require immediate access to records. Rather than scanning all documents at one time, the records are stored in our records center and imaged only when the client needs it. Therefore, you are only imaging what you want when you want it, saving time and money.

The process is simple, you request the file to be scanned and instead of delivering that file to your office, the file is pulled, the contents are scanned, and the file is returned to its storage location. The image of the file can then be accessed via ActiveWeb, a secure online web connection that provides electronic access to files, or it can be emailed to you.

DOCUMENT IMAGING AND ELECTRONIC BACKUP

Document imaging simultaneously provides solutions to two fundamental business concerns:

1. The need to conserve and efficiently utilize physical business space
2. The need to maintain quick reliable access to business records and information.

Document imaging quality and conversion rates have seen dramatic improvements in the last five to ten years making the service accessible for businesses of any size.

THE BENEFITS

Morgan Records Management provides document imaging services for small and large orders. No software or hardware investment is necessary for our clients to achieve a business environment that efficiently utilizes technology, personnel resources and available room.

In addition, migrating your business information into an electronic format means that sharing information or improving work processes and information workflow becomes simple and efficient, contributing to time savings and cost reductions.

STORAGE

Morgan Records Management can provide you with multiple storage options such as a DVD archive collection, a single hard-drive unit containing your entire archive, or have Morgan Records Management store and maintain your data on our servers (no additional hardware or software necessary).

OPTIONS

Morgan Records provides multiple imaging options including OCR, zonal-OCR, file indexing, resolution options, and storage and back-up solutions to fit your business.

CUSTOMIZATION

Call us today to begin exploring the different ways that a document imaging program could benefit your business. We'll work with you to design the perfect program that meets your goals and your budget.

Scanning paper to go paperless? Have a plan!

WHAT IS SCAN-ON-DEMAND?

Scan-on-Demand is a customized digital imaging process that allows a company to completely control the records that get scanned and when. It is based on the proven statistic that businesses generally only need access to 5-10% of their archived records over time. By scanning only the needed records when they are needed, businesses can realize the benefits of PET (paper-to-electronic transition), while avoiding the prohibitive costs and diminished returns of scanning across the board.

Since the advent of the desktop computer nearly 30 years ago, everyone has talked about 'going paperless'. But here we are, with all of the technological capabilities one could ask for, and we're still producing paper - mountains of it. So, what of the paperless office? Well, the dream has not died, but what the dream does require is a plan.

There are some industries that are primarily taking advantage of software platforms that may be standardizing their business/office information and documentation management practices, providing a vehicle with which to make the very long leap to a paperless environment. An example would be the efforts to standardize and digitally convert medical records and the billions of dollars being poured into that very complex proposition. However, what about the rest of the business world that day-in and day-out relies on the most heavily used and oldest recording media available: paper?

Well, some companies have still tried to go 'paperless' by combining two elements of records management, namely, hard copy record scanning and subsequent hard copy record archiving. This process of scanning (turning the hard copy record into a digital copy such as a TIFF or PDF) and archiving (long-term physical storage of the original hard copy) has become commonplace in all industries from manufacturing to law and from accounting to real estate. The goal? Have the same access to information that would normally be available by keeping the hard copy record, but without keeping the hard copy record.

This process, though common, has some problems with it both from a regulatory stand point and a cost stand point. We'll deal with the regulatory issues first.

TWO BARRIERS

Though there are many cases in which a scanned image of an original hard copy record will suffice to fulfill industry or government regulations, this is far from being a standard that applies to even most records in most industries. In order to be in total compliance with all regulations, one must first understand the retention requirements for each record type. Retention requirements vary in terms of the length of time a record must be maintained, and in what format that record must be maintained. Some records, for example, must remain in hard copy format, immediately accessible, for a certain period of time; some can then be archived or perhaps scanned and subsequently disposed of.

Other regulations might require a record to be kept in hard copy format for the entirety of its retention period, but can be stored off-site immediately. The different scenarios can go on and on in a multiplicity of different record-specific requirements. These requirements vary industry to industry and state to state.

The second major issue is cost. Generally, the cost of scanning all of your paper files and capturing them electronically is simply too expensive. This is because of the manual nature of the record preparation involved in scanning. When scanning records, there can be no paperclips, staples or other document binders present or the scanning machine might jam or break. In addition, there



is a quality control element involved that requires human approval. An image of a contract had better be crystal-clear so that it will be easily printed and read long into the future. Another manual process that is often overlooked is the keying in of data with which one might identify or index the image in the future when retrieval becomes necessary. These three elements, to say nothing of the storage and maintenance needs of the electronic file over time, are usually cost-prohibitive for a company to engage fully in a PET (paper-to-electronic transition) program. At an industry average of between \$0.05 to \$0.10 per scanned page, a typical 1.2 cubic foot records carton containing 2,500 pages will cost between \$125 and \$250 to scan fully. That's just one carton of records. Even for a small business with only 75 cartons, this is a tall order and usually is not achievable. That same carton would cost mere dollars per year to archive for its full retention period.

But there is good news in all of this. Scanning technology and equipment is improving all the time. OCR (optical character recognition), quality control, and document recognition capabilities in image-capture software have come a long way in the last several years, allowing many companies to begin laying the foundations of making this transition at a lower cost, perhaps over an extended period of time.

HERE ARE FIVE RECOMMENDATIONS:

1. Understand what the government (federal and state) requires for retention of particular record types for your industry.
2. Implement industry best-practices for record creation, usage, retention, archiving, and destruction so that no one will question your commitment to your customers and business partners.
3. Don't worry about scanning everything from the past 10 years in order to make the paperless transition. You can scan all of those cartons at \$250-\$375 per carton, or you can archive them for a few dollars each per year, heightening security and regulatory compliance and maintaining total access to your valuable business records.
4. Scan what you need, when you need it. Some commercial records centers offer 'scan-on-demand' services so that you can create digital versions of your hardcopy records only when you need to. When you have no use for the hard copy, but need the information contained in it, this is an imminently more cost-effective approach. In addition, an average company only accesses 5-10%

of its archived records during their retention period. So why waste all those dollars on scanning all those records that will never need to be accessed?

5. If you are serious about 'going paperless' have only the new, active records scanned. This process of incremental PET (paper-to-electronic transition) over time will position your company for growth (by creating an electronic records archive) and enable it to transition more smoothly to adapt to the many technological changes that are sure to come in the future.

As you choose a vendor to store, manage and maintain your records, make sure they are able to retrieve and deliver your records to you in multiple ways. They should also be helping you to create and implement policies, procedures and best practices to make sure your records are always secure, yet always available to you. With a small investment of time a good records management company will be able to provide your business with a clear pathway to a better, more efficient, lower cost and more compliant records management program than almost anything you may be engaged in currently.

Morgan Records Management, LLC provides comprehensive records management services including storage, retrieval, scanning and destruction. They also provide no-cost Client Needs Assessments designed to provide businesses with clear, objective feedback to help determine the best course of action to achieve greater compliance, work process efficiency and productivity while reducing current records management expenditures.

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COST VS. BENEFIT

If a sample of 100 records boxes is used to determine actual costs for implementing a scanning solution for a small company, the costs can clearly be seen to outweigh the benefits.

1. Equipment - Typically a small company will need to spend \$500- \$1,000 on a scanner that will meet both the speed and quality expectations for the company. We'll call it \$750.
2. Software - Access to an online repository can be purchased for a monthly fee, or an actual piece of software can be purchased and deployed onsite. This cost is typically between \$2,000 and \$10,000 per year.
3. Labor - If an employee is paid \$20/hour (including taxes and overhead), and they spend 5-10 hours per week scanning, this becomes \$5,000 - \$10,000 per year. If the records are going to be indexed properly for efficient retrieval in the future, this will take much more time.

The total yearly expense for this small scanning program can be expected to land between \$7,000 and \$20,000 per year.

Those same 100 boxes could have been archived for about \$600 per year, while the scanning of roughly 1-2% of the total records inventory over the course of the year would have cost the company less than \$1,000. That's a savings of \$5,000 to \$18,000.

Better Access — Complete Control

Morgan Records Management's mission is simple: provide our customers with services and solutions that drive down costs while simultaneously increasing security and accessibility and supporting regulatory compliance. Our goal is to do this through understanding our customer base, by creating solutions that are customized to meet their needs and by providing second-to-none customer service and response.



MORGAN

RECORDS MANAGEMENT

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