

TRANSFERRING FILES TO ARCHIVES

Before transferring files to University Archives, you must have an approved Records Retention and Disposition Schedule for the records series in your office. Please consult this schedule to determine when inactive records should be transferred to University Archives or destroyed. If you cannot locate your Records Retention and Disposition Schedule, contact the University Records Manager, at University Archives and Records Management Services (962-6402).

A Records Transmittal Form must be completed and returned to University Archives and Records Management Services before a transfer will be authorized. On the form you should list the contents of each box to be transferred. You do not need to list every folder, but you should list all records series as they appear on your approved schedule, along with the item number (from the schedule) and the inclusive dates of each series, as in the examples below.

Box 1. Item 2. Accreditation File, 1994-1995
Item 3. Annual Reports, 1990-1996

Box 2. Item 7. Committees and Councils, 1985-1995

If you have a more detailed list of your files (for instance, a list that gives the names of the Committees and Councils in Box 2), you may attach that list to the transmittal form.

Send the original and two copies of your Records Transmittal Form to University Archives and Records Management Services (CB# 3926). The items listed will be checked against your office's approved retention schedule. If the items are authorized for transfer, we will send you a set of box labels. These labels will include a Records Transfer Number (RT#). Place the labels on the long side of the boxes to be transferred.

Records should be boxed in standard letter sized boxes (12" x 15" x 10"). These may be obtained from Staples ("Economy Storage Boxes Item # 825695/Model# 33250E-CC). **Please, do not use non-standard boxes, such as copier paper boxes.** Records should be taken from filing cabinets and packed in the cartons in the order in which they were filed in the cabinets. **Do not purge or rearrange the files.** Pack them firmly in the cartons and fill each box completely, but do not force them. Place all folders in an upright position with the folder titles facing the same direction. All records in the series should be transferred intact and in order with each folder's contents clearly labeled. Please, do not write anywhere on the cartons or use tape to close them.

Facilities Services (Housekeeping) provides a moving service to bring the boxes from your office to University Archives and Records Management Services. Use their online request form at <http://www.fac.unc.edu/> or call them at 962-6586. **Please notify the University Archivist (962-1345 or 962-6402) when you have scheduled your transfer with the movers** and again when the movers leave your office and are on their way to Wilson Library.

After the records have been received, we will return a copy of the transmittal form to you as a receipt.

If you have questions about any part of the transfer process, call University Archives and Records Management Services.

RECORDS TRANSMITTAL FORM

(UARMS Form 9 Revised 5-28-2009)

Archives Use Only	
Records Approved for Transfer:	Signature:
Records Transfer #:	Collection #:
Date Records Received:	Signature:
Processing Priority:	Shelf Location:

Instructions: Send original and two copies to **University Archives and Records Management Services, CB# 3926**. One copy will be returned to you after the records are received.

<u>FROM: (Name and Address of agency transmitting records)</u>			
Liaison Name:		Liaison Signature:	
Email:		Phone:	
Building, Room, CB#:			
<u>Department #:</u>		Schedule #:	
Total number of boxes transmitted		Total linear feet transmitted	
		Description	Disposition
Box #	Item # from Schedule	Records series list with inclusive dates	ARCHIVES USE ONLY

Continue Description on UARMS Form 9A

RECORDS TRANSMITTAL FORM (continuation)
(UARMS Form 9A Revised 5-2009)

Agency:			Page:
		Description	Disposition
Box #	Item # from Schedule	Records series list with inclusive dates	ARCHIVES USE ONLY