**RECORDS TRANSFER FORM**

| **Box \_\_\_\_\_\_ of \_\_\_\_\_\_\_\_** | **Temporary Box #:** | **Permanent Box #:** |
| --- | --- | --- |

| **CONTACTS** | | | |
| --- | --- | --- | --- |
| **Department/Unit:** | **Contact:** | **Telephone/E-mail:** | **Date:** |
| **Current Location:** | **Transfer to Location:** | **Transfer to Contact:** | **Date:** |

| **APPROVALS** | | | |
| --- | --- | --- | --- |
| **Approved by: (name)** | **Position Title:** | **Signature:** | **Date:** |

| **RECORDS LISTING/DESCRIPTIONS** | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **File No.** | **Records Class No.** | **Retention Period** | **Records Class / File Title / Brief Description** | **Date Range (Years)** | | **Media** | **Additional Information** |
| **From:** | **To:** |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  | Press tab to add additional lines |

**Instructions:**

1. Use one Records Transfer form per box
2. Each box should be numbered, use a dark marker to number the boxes, number on one of the short sides of the box so it can be seen when boxes are stacked,
3. **Temporary Box Number** – Assign a box number to identify boxes, use a consistent numbering system such as dept acronym-year-001, -002, etc. e.g. GCBS-2010-001 – do not reuse numbers)
4. **Permanent Box number** - is usually a bar code number provided by a storage vendor, leave empty for now.
5. **Box \_\_\_ of \_\_\_\_** - enter box number out of total number of boxes. If there is only one box indicate Box 1 of 1
6. **Contacts** – this section should be completed by the person doing the listing or who would be a contact person if there are questions about the boxes or contents (Department, Name, contact person and date)
7. **Approvals** – this should be a senior person who can approve the transfer of records, it should be a Director or higher
8. **Records Listing/Descriptions** – complete with as much information as possible
9. **File No**. – if files are numbered then add use the file number here, if not numbered just use chronological numbering
10. **Record Class** – this should match the Records Retention Schedule, if you are not sure what the classification is - leave blank and check with the Records Management Coordinator (RMC = [recordsmanagement@ryerson.ca](mailto:recordsmanagement@ryerson.ca))
11. **Retention Period** – this corresponds to how long records must be retained according to the Records Retention Schedule, if not known check with the RMC.
12. **Records Class / File Title** – list folders or file titles here – if batching, include the name of the project – for large batches of records a general description is sufficient
    1. For Capital Projects and Real Estate – include address or building information in the File Title – this will be the key search terms.
13. **Date Range** – enter first year and latest year – if not known enter unknown for “From” date. We require a “To” date to calculate retention.
14. **Media** – enter paper or other media e.g. CDs as needed
15. **Additional Information** – if there are other comments such as descriptive information about the contents or use of accordion folders, etc… add this information here
16. Save a copy of this form with filename that matches the Temporary Box Number (this will make it easier to look up and track content e.g. RecordsTransfers-GCBS-2010-001-Projects)
17. Place a copy of the form in the front of the box and keep a copy for your records. Maintain these listings in order to be able to retrieve or manage disposition later on. Also, send a copy to the Records Management Coordinator.

**Box Packing Guidelines**

* Binders and hanging folders take up a lot of space and add a lot of weight to boxes and should be removed
  + Remove information from binders – place in folders or accordion folders, attach binder labels to folders as appropriate, butterfly clips do not need to be removed.
  + Do not pack hanging folders – remove contents and place information in folders
* Do not over-pack the boxes, files should not be crammed together so it is difficult to see the folder labels and remove folders if needed
* Many storage companies have weight and packing guidelines, often heavy boxes will not be picked up (nor should staff be handling very heavy boxes)
* Pack similar content together, i.e. records within the same classification and with similar retention periods together
  + e.g. Box 1= Project files 2005-2008, Box 2=Committee Files 2009-2012
* Please contact email [recordsmanagement@ryerson.ca](mailto:recordsmanagement@ryerson.ca) if you have any questions or comments about this form or process