

TRANSFER OF RECORDS TO SPECIAL COLLECTIONS AND ARCHIVES

The following requirements shall be met before any transfer of records to the Library Special Collections and Archives department:

- An initial consultation with Special Collections & Archives to discuss scope of collection
- Detailed and accurate labeling of record boxes/folders/enclosures
- Complete box inventories and transfer form

PREPARING RECORDS FOR TRANSFER

- The Special Collections and Archives prefers a standard sized durable box 15” in length x 11.5” in width x 10.5” in height and made of an acid neutral or acid free material if possible
- Pack records in the same order they are/were filed in the office
- Leave space within the container for ease of reference (about 2 - 3” of working space)
- Remove or replace hanging file folders with plain folders
- Provide notification about condition of records, such as items that are fragile or unique/rare or that require special archival attention
- Remove any records that contain sensitive personnel information, such as performance reviews or letters of recommendation, or student information protected by FERPA
- Don't send boxes of unfolded records
- Boxes ideally should weigh no more than 35 lbs.

LABELING AND NUMBERING BOXES

- Label boxes on the side (under the handle)
- Using a marker or pencil, clearly note on the side of the box:
 - The name, division, or other organizational unit that the documents are associated with
 - The type of records within the box
 - The year or year range of records within the box
 - Any sealed or restricted records series
- Number the boxes with consecutive numbers – for example: 1993-1, 1993-2, 1993-3, etc.

BOX INVENTORIES

Each records box shall contain an inventory/container list. If the inventory was created electronically, please provide a copy with the transfer form.

RECORDS TRANSFER SHEETS

- Attach a copy of the inventory to the transfer form
- Please keep a copy of the transfer form
- The transfer form should accompany the records at the time of transfer or can be sent electronically or by mail

TERMS AND CONDITIONS

- It is understood that management of transferred materials becomes the responsibility of Special Collections and Archives, including decisions about retention, access, arrangement, distribution, and exhibition. Decisions will be informed by professional best practices and university priorities
- Once transferred, items in the archives do not circulate, and all access to said items will be restricted to the Library premises

Special Collections and Archives Records Transfer Form

875 Perimeter Dr MS 2351 | Moscow ID 83844-2351

Phone: (208) 885-0845 Email: libspect@uidaho.edu

This form documents the transfer of records from the originating office to the University of Idaho Library Special Collections and Archives (Spec). Spec faculty or staff will appraise these records for enduring historical or administrative value, destroying the records deemed to be of insufficient value in accordance with the archive's collecting policy. The remaining records will be preserved and made available in accordance with professional best practices and any pertinent rules or laws.

When possible, send this form (and if applicable, a box/folder title list) electronically prior to sending records. We will then advise you on the appropriate transfer method. If you have any questions about this form, please contact [Special Collections and Archives](#).

Record Custodian's Name _____ Date _____

Title _____ College Affiliation _____

Email Address _____ Phone Number _____

Description (e.g., Title, Types of Material, Nature, Item Relationships, Duplicated/Missing Materials):

Restrictions on access required? Yes No (if yes, Spec will follow up for further details)

These records may include (select all that apply): *Please make every effort to remove these where possible!*

- personally identifiable information, such as Social Security Numbers, passwords, or bank accounts
- personnel records including search, review, promotion, and tenure files
- medical records or attorney/client records
- other confidential or restricted information: _____

Subject Areas (mark all that apply):

- Administrative
- Biographical information
- Board/council
- Committee meetings
- Correspondence
- Course materials
- Diaries/memoirs
- Publications
- Research

<p>Digital Records</p> <p>Record date range _____</p> <p>Extent of records _____KB</p> <p>Record types (check all that apply):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Text (e.g., reports, contracts, email) <input type="checkbox"/> Images (e.g., photos, art) <input type="checkbox"/> Video (e.g. how-to videos, event recordings) <input type="checkbox"/> Audio/Sound Recordings (e.g., interviews) <input type="checkbox"/> Software/Multimedia (e.g., SVG, Python) <input type="checkbox"/> Databases/Data (e.g., relational database) <input type="checkbox"/> Websites (e.g., archived, content-based) <p>File formats/extensions (e.g., .doc, .pdf) _____</p> <p>Describe technical information (e.g., file structure and organization, software, OS, hardware, naming conventions, and original location):</p> <p>Transfer Methods (check all that apply):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Cloud <input type="checkbox"/> CD-ROM/DVD-R/W <input type="checkbox"/> USB Flash Drive <input type="checkbox"/> Email <input type="checkbox"/> Other _____ 	<p>Analog Records</p> <p>Record date range _____</p> <p>Number size of boxes (e.g., 6 large boxes) _____</p> <p>Record types (check all that apply):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Correspondence <input type="checkbox"/> Constitutions & by-Laws <input type="checkbox"/> Marketing materials <input type="checkbox"/> Memoranda <input type="checkbox"/> Minutes & proceedings <input type="checkbox"/> Monographs <input type="checkbox"/> Photographs <input type="checkbox"/> Programs & brochures <input type="checkbox"/> Other _____ <p>Transfer Methods (check all that apply):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Shipping (Provider _____) <input type="checkbox"/> Campus mail <input type="checkbox"/> Personal delivery/pickup <input type="checkbox"/> Other _____
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I hereby authorize the transfer of the following records to the University of Idaho Library Special Collections and Archives. I certify that I am authorized to transfer these records to the Archives and that the information on this form is accurate. I further certify that, to the best of my knowledge, these records are not subject to any current or pending litigation, subpoena, or other legal demand for their retention or disclosure.

Contact Signature

Date