TRANSFER OF OFFICIAL PERMANENT RECORDS TO UNIVERSITY ARCHIVES

INTRODUCTION
Special Collections and University Archives preserves university records of permanent value. Such records have continuing administrative, legal, fiscal or historical significance. By maintaining these records, we can ensure that the important work done by your unit is documents for future generations.

RELATED INFORMATION
• OSU Policy and Procedures Letter 3-0190
• Records Management Act, 67 Oklahoma Statute 205
• Consolidated Records Disposition Schedule, General and University and College
  www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm
• Oklahoma Open Records Act, 51 Oklahoma Statute Supplement, Section 24A.1 et seq
  www.foioklahoma.org/resources/open-records-act/

WHAT TO SEND TO THE ARCHIVES
• Records that document the organization, function, policies, procedures, operations and essential transactions of the unit and friends group
• Official correspondence and memoranda
• Committee minutes
• Publications and annual or other reports issued by your unit
• Photographs (please identify before transferring)
• Machine readable records accompanied by printed documentation
• Remove CONFIDENTIAL MATERIAL from files and make arrangement for its safe storage (only records that are exempt from the Oklahoma Open Records Act)

WHAT YOU SHOULD KEEP FOR YOUR CONVENIENCE
• Personnel records
• Routine and courtesy correspondence such as: acknowledgement, announcements, confirmations, invitations, itineraries, reservations, letters of transmital.
• Material not related to the function/administration of the office:
  - General distribution memos of other offices
  - Publications of other institutions
• Departmental copies of financial records such as:
  - Monthly budget statements
  - Purchase orders
  - Receipts, vouchers, work orders
  - Salary distribution forms
• Generally, if your office does not create a record, your copies are convenience copies and may be disposed of unless they contain confidential information

QUESTIONS OR COMMENTS?
David Peters, Head of Special Collections
Edmon Low Library, Room 204
405-744-6597

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HOW TO TRANSFER OFFICIAL RECORDS TO UNIVERSITY ARCHIVES

PREPARING YOUR FILES

• In order to correctly identify records, consult the Consolidated General Records Disposition Schedule for State Universities and Colleges

• Fill out a Records Destruction/Transfer Form. If you have records for destruction, place them on a separate form. Make a copy for your records. Send original to University Archives, Edmon Low Library, Room 204.

• Records Destruction/Transfer Requests are reviewed on a regular basis. Transfer requests are acted upon immediately.

• Place records approved for transfer in file folders with descriptive labels.

• Separate and label confidential materials.

• Replace hanging file folders with traditional flat folders.

• Label each box with your name, box number (1 of 3, 2 of 3, etc.), the name of the records series, dates covered by the records, and schedule and series number (i.e. “UC GRDS, 5-15”).

• Pack records in the order in which they were kept by your office.

• Prepare a list of folder titles for each box and place in the front of Box 1.

• Call University Archives at 405-744-6311 so that we may expect your records.

• If the volume of your records warrants, call Physical Plant at 405-744-7154 to arrange for transport of your records to Room 204, Edmon Low Library.

• You will receive confirmation from the University Archives that your records have been received. At that time, you will be given the accession number assigned to your records. This number is used to identify the records should you need access to them.

• When the records have been processed and a finding aid has been prepared, you will receive a copy of the finding aid via campus mail. Generally, this process takes 6-36 months, depending on current receipts.
NOTICE OF ITEMS FOR DESTRUCTION OR FOR TRANSFER TO ARCHIVES

[ ] Request to destroy records
[ ] Request to transfer records to University Archives

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<thead>
<tr>
<th>Inclusive Dates</th>
<th>* General Records Disposition</th>
<th>Item Description &amp; Volume</th>
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I hereby certify that, to the best of my knowledge, all state and federal audits have been completed and that no legal actions or investigations are pending for the above records.

________________________________________
Dean or Administrative Officer

Title

MAIL TO:
David Peters, Head of Special Collections
University Archives
Edmon Low Library, Room 204

For Office Use Only
Approved
[ ] Destruction of Records  [ ]
[ ] Send to Univ. Archives   [ ]
[ ] Dept. to retain until    [ ]

[  ] Destruction of Records     [  ]
[  ] Send to Univ. Archives     [  ]
[  ] Dept. to retain until      [  ]

GET HELP
Text: 405-592-4128
Call: 405-744-9775
Email: lib-dls@okstate.edu

WWW.LIBRARY.OKSTATE.EDU