

# Records Management Transmittal Procedures and Instructions

## Preparing Records for Transmittal

### What NOT to do When Preparing Records

1. Don't just throw files in a box. The system is kept from the cabinet to

the box

Don't leave files in hanging folders or binders! Remove the files from them and rubber band the related files together

# INSTRUCTIONS FOR COMPLETING RECORDS TRANSMITTAL LIST (FORM RM-1)

**This form must be used to transfer Permanent and Non-Permanent Department Records to Oregon Tech Records Management.**

Permanent Records must be in **WHITE** acid-free boxes

Non-Permanent Records must be in

**Please follow these instructions to ensure the form is filled out correctly**

1. Type the full name of the **Department/ Sub-Department**.
2. Type the **Department Accession Code**.
3. Type the name of the **Department Contact Person**; this will be who fills out the form.
4. Type the **Phone Number** of the contact person.
5. Type the **Pick-up Location** for the records; this will be wherever the boxes are currently stored.
6. Check this box if the transmitted records contain any **Confidential Information**.
7. Check this box if the transmitted records contain any **Permanent Records**.
8. Type the **OAR Series Number** this record is being retained under the archives-retention-schedule.
9. Type the **OAR Series Title** this record is being retained under the archives-retention-schedule
10. Type the **Retention Years** this record is being retained for the archives-retention-schedule.
11. Type the **Expected Destruction Date** for each record (the date format is 6/30/20xx).  
*Destruction is based on the **Inclusive Dates**, NOT the Transmittal Date*

## **12. Records Management Use Only!**

13. Type a **Detailed Description** of the records contained within each box.
14. Type the **Inclusive Dates** for the records in each box.
15. Type the full name of the **Registered Department Records Officer**.
16. Enter the **Date of Transmittal**.

*Transmittal Approved by and Date Approved: Records Management Use Only!*