
Transferring Archival Records: How to Fill Out a Records Transmittal and Box Content List

Purpose: Provide guidance to state and local government agencies on how to fill out a Records Transmittal and Box Content List for records being transferred to Washington State Archives.

Once an agency has determined that they have archival paper records that will eventually be transferred to the Washington State Archives, there are certain steps that should be followed to ensure the records can be transferred properly and made available for future use. One step is to fill out a Records Transmittal and Box Content List. It is important that records are appropriately identified prior to sending them to the Archives in order to make them accessible for future research. Bear in mind that others will view these records in the future, and may not have the intimate knowledge of the records that you possess.

Follow these guidelines when filling out the Records Transmittal and Box Content List:

- When filling out **Agency** and **Office/Sub-Division**, make sure to use proper names. Please do not use acronyms, office numbers, or obscure “agency speak.”
- Enter the **name**, **phone number**, and **e-mail address** of the agency’s **Records Officer** in the appropriate boxes.
- Make sure that the **Box #** coincides with the contents in each box. If you are sending microfilm or microfiche, make sure that the **Reel #** coincides with the correct reel (or microfiche packet).
- Every content list must have a short description or title that explains the contents of the box, followed by a list of folders. The title and folders should be listed in the **Record Series/File Title** section. Make sure that the appropriate **DAN** (Disposition Authority Number) is listed next to the record series. It is important that each content list have adequate information for future retrieval.
- Each record series must have accurate dates listed in the **Date** section. Please do not send records without including the dates.
- Any statutory exemptions or confidential information should be clearly noted on the content list.
- If you are transferring paper records from a local government agency, please sign and date the **Transfer of Custody Agreement** at the bottom of the form. It is not necessary to sign if you are transferring microfilm, microfiche, or records from a state agency.

By taking the appropriate measures prior to transfer, agencies will greatly assist the efforts of the Archives to provide access to important public records for generations to come.

**Additional advice regarding the management of public records is available from
Washington State Archives:**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**