
Transferring Archival Records: Preparing Paper Records for Archival Transfer

Purpose: Provide guidance to state and local government agencies on how to prepare paper based records for transfer to Washington State Archives.

Once an agency has determined that they have archival paper records, and the retention requirement for those records has been satisfied, there are certain steps the agency should undertake to ensure the records are ready for transfer to the Washington State Archives. Meaningful arrangement and identification of the records helps our archivists provide efficient and knowledgeable reference to both the creating agency and the research community.

1. Take time to review the records and consult with your Records Officer. Remove duplicates, non-archival records, and office supplies. Organize documents by record series.
2. Use an approved archival box, available through the Washington State Archives. No other boxes or containers will be accepted. Provided the boxes are used to store records that will eventually be transferred to the Washington State Archives, they can be obtained at no cost from:
 - a. State Records Center (for state government agencies); or
 - b. Your local branch of the State Archives (for local governments).
3. Boxes should include only one record series (which may result in more boxes). Contents should be clearly identified on box content labels affixed to the outside of the box and contain a box content list.
4. Content lists should be typed and contain adequate information for future access. Please do not use acronyms, office numbers, or obscure “agency speak.”
5. Do not pack records tightly in a box: allow for some “wiggle” room for retrieval and re-filing. Folders should be organized facing the front of the box. If legal sized, folders should face the opening side of the box.
6. Label folders clearly and accurately, so that people unfamiliar with your agency can understand and navigate the records in the future (“Mary’s files” or just “1995” is not adequate identification).

Any statutory exemptions or confidential information should be clearly marked and communicated to Archives staff prior to transfer. For example, place these records in a red folder or marked envelope in the box, and note the status of the record on the accompanying content list.

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**