

# Depository Transfer Checklist

Once you have identified your records and their retention periods using the [General Records Schedule](#), you can determine which records you would like to store. In order to quickly and accurately transfer your eligible records to the Harvard Depository, please make sure that you complete all the steps outlined in this checklist. If you need assistance or have questions about any aspect of the transfer process, please contact the ARM program at 617.432.6194 or by email at [ARM@hms.harvard.edu](mailto:ARM@hms.harvard.edu).

√	<b>Tasks</b>
	<p><b>1. Order standard records center boxes (12”L x 15”W x 10”H) and barcodes</b></p> <ul style="list-style-type: none"> <li>They are available from ARM by email (<a href="mailto:arm@hms.harvard.edu">arm@hms.harvard.edu</a>) or by calling 617.432.6194.</li> </ul>
	<p><b>2. Arrange and pack records. Boxes should be packed accordingly:</b></p> <ul style="list-style-type: none"> <li>All records in a single box should be from the same General Records Schedule series.</li> <li>Letter-size folders should be packed facing the 12” side of the box, and legal-size facing the 15” side of the box. Mixed letter and legal should face the 15” side.</li> <li>Box records the same way they were filed in the office (for easy retrieval)</li> <li>Box lids should fit tightly—no hanging folders, upright binders, or overstuffing</li> </ul>
	<p><b>3. Label and barcode boxes on 12” side of box</b></p> <ul style="list-style-type: none"> <li>Barcode is placed on the lower right corner;</li> <li>Box label is placed in the middle and contains           <ul style="list-style-type: none"> <li><i>Department</i></li> <li><i>Series title</i></li> <li><i>Date Span</i></li> <li><i>Box number and total number of boxes</i> (ex. Box 1 of 10)</li> </ul> </li> </ul>
	<p><b>4. Prepare Paperwork- the required document downloads and detailed instructions can be found at <a href="https://countway.harvard.edu/center-history-medicine/center-services/archives-records-management/offsite-records-storage">https://countway.harvard.edu/center-history-medicine/center-services/archives-records-management/offsite-records-storage</a></b></p> <ul style="list-style-type: none"> <li>Transmittal Cover Sheet (Word or PDF document)           <ul style="list-style-type: none"> <li>Signed by authorized user</li> <li>Contains accurate information (<i>Department; Address; Contact person; Number of boxes; General Records or Special Records number; Barcode range; Description of materials; Year span</i>)</li> </ul> </li> <li>Box / Folder List (Excel document)           <ul style="list-style-type: none"> <li>Data matches info on Transmittal (<i>barcode range; dates; description of materials; Records Schedule numbers</i>)</li> <li>Dates are calculated correctly and in a consistent format</li> <li>Instructions, samples, and unnecessary blank lines (ex. close date) are deleted</li> <li>Records schedule numbers are verified</li> </ul> </li> </ul>
	<p><b>5. Send an email to <a href="mailto:ARM@hms.harvard.edu">ARM@hms.harvard.edu</a></b></p> <ul style="list-style-type: none"> <li>Attach the <i>Box/Folder List</i> and scanned, <b>signed</b> <i>Transmittal Cover Sheet</i></li> <li>Include any special instructions for couriers</li> </ul>