

The Records Transfer Form Instructions

The Records Transfer Form lists those records which have passed their *active office retention period* and which qualify for inactive storage. Thus, they are *transferred* from active to inactive.

The records coordinator of the mission center office/congregation fills out a Records Transfer Form, using the record series titles from their retention schedule. In filling out the form:

Field Name	Instructions
Mission Center	Indicate where the records came from by imputing the MC to whom the records belong.
Office or Congregation	Give the Office or Congregation where the Records are being stored (the place/address, room, file drawers, etc.)
Records Coordinator and contact #	Give the name of the person responsible for maintaining the records (records coordinator), and a contact number.
Packed By	Record who packed the records and the
Date Packed	Date the records are filed or packed
Page # of #	Mark your page numbers as 1 of 1; or 1 of 2, then 2 of 2 etc.
Record Series Number	Referring to the retention schedule for the record series number; write out the record series number as it appears on the approved schedule.
Record Series Title	Referring to the retention schedule for the record series number; write out the record series title as it appears on the approved schedule.
Retention Year	Determine and write the Retention Date as the Year the records are due.
Final Disposition	Include the Final Disposition (Destroy or Archival Review or Permanent)
No.	Use the numeric column when applicable.
Document/Folder #	Use the document/folder number column only when applicable.
Description of Records Content	Describe the record series content (see below)
Range of Records	Note the date range for the records listed

Box #	<ul style="list-style-type: none"> • Number your boxes sequentially. Use an abbreviation for your mission center or congregation/the year you are packing, and the sequential number of the box (.01, .02, .03 etc) and put this number on all the transfer forms and on the box. Write in large numbers on the front side of the box with a heavy permanent black marker. (If you are using plastic tubs, tape a large sheet of paper securely to the side of the tub with packing tape and write on that.) Also, write the final disposition of the records on the box. Example: MC/2004.01 and D, MC/2004.02 and D, MC/2004.03 and A/R, M/C2004.04 and P...etc. You can write out the disposition codes if you have room. <i>Make sure you also put the box number on your transfer form(s) as this is the form you will use to both find a record when needed, and dispose of the records when ready.</i>
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- *When you print the form, you will need to make 3 sets: one to go with the records, and 2 for your office: file one set by record series and one set by the year they are due for disposition. It is helpful to use 3 colors: white for your office copy (usually the original you will create), and then make the other two colors: yellow for your copy to place inside the box, and pink for your copy to file by the Year Due. All of them will need the box numbers on them (see following). You will use the office copy (the white copy) while they are in storage to locate any records you may need. You will keep the pink copy by the year (2010, 2011, 2012) the records are due their disposition. Transfer forms for records that are to be kept permanently should be filed together. (See Final Disposition, following)*
- If you are not using boxes, but are transferring the inactive records to lower file drawers, or elsewhere, then use the column that says Box # to write in the location of the records. Your yellow copy of the transfer form will go to the front of these records.
- **NOTE:** You may have more than one page for a group (record series) of records; you do not need a new page for each box, or your records may take more than one box (sometimes several). However, **DO NOT** mix record series and different retention dates on the same form, or in the boxes. Use a separate form for each series. If you place more than one series in a box, they must all have the same retention period and separate them with clearly marked dividers, such as half of an old file folder. Keep them with *like* retention periods and *like* dispositions (for example: all records in the box become due in the year 2010 and all are D-Destroy). Remember: *Use only one record series per form*, but you can have *more than one page or box per series*. (Refer to your office retention schedule.)

Description of Records Series Content

On the Records Transfer forms you will list the contents of the boxes that are sent to the Records Center. One good rule of thumb is to detail list records that are placed in the box, such as file folder titles. For example, if you write "Correspondence A-Z" you may need to search through whole boxes. However, if you list the file folder names, you can look for a specific file, such as "Field School Reports, 1996," or, if the reports are further identified, "Fields School Reports: Central Mission Center, South Chrysler Congregation, 1996." Listings like "John Smith's files," or "miscellaneous," are not helpful. The information listed for you to retrieve records is as good as you make it. The better you make the description, the easier it will be for you *or someone else* to find the records needed. An office may use their inactive records, based on the information on the transfer form, at all times.

Removal of Files (Temporary or Permanent)

Whenever you remove a file from stored records, place a memo (like a check-out slip) in the box indicated what file(s) has been removed along with date and initials. Write on the outside of the file folder that you take out of the box, the box number where it/they are to go back, so they don't get mixed up in your active files. If you find that you need these files active again, write on the transfer forms in the box and in your files that those specific records have been *permanently removed from the box with your date and initials*.

The Records Transfer form is available on the computer. To access the Records Transfer Form use the following steps:

1. Click on this active link or type the following URL in to your Internet browser: <http://www.cofchrist.org/cfo/#Records>
2. Click on: Records Transfer Form, to open the Word version of this file.
3. When the file is open go to **File > Save As** and save the file onto your hard drive. Name the file whatever name works for you.

Please do not work in the document until it has been saved. The file from the Internet is meant to be a template only. The form has been formatted so that you need only tab from one cell to another to move around in the document. There are 2 pages to the form. Print more if needed.

Using the Interfile Column

The Interfile column is on the Records Transfer Form. It is used when you find a file/record that belongs with a records series that is already packed or moved. The transfer form is filled in with the information and indicates which box the file is to be

interfiled in. Mark the interfile column with an X. Make your three copies, then attach the form to the already existing forms that you have.

Making Final Disposition

Once a year you will pull out all the pink transfer forms due for disposition that year. Then you will pull and match them with the white office copy of the transfer form, putting them together. The time of year that you will do this depends on your schedule. January is one option, when you have a new year. Summer may be too busy with vacations and reunions, so you might want to do this in the fall. Or summer may be when everyone is gone and it is slow and quiet. Applying disposition once a year should be sufficient for the amount of records that you will have.

If the records are to be destroyed, you will need a **Certificate of Destruction** to go with your records. Pull and match the boxes and the records inside with the transfer forms and fill out the certificate accordingly. After you have disposed of the records, sign the destruction form and staple one copy of the transfer form to it so you will know what records were disposed of and file this permanently. Dispose of extra transfer forms left over.

If you are sending some records to the Archivist for review, enclose a cover memo and the copy of the transfer form inside the box. File a copy of your memo with your copy of the transfer form stapled to it in the same file as your certificates of destruction. Regardless of whether the records are chosen for the archives, this will complete your watch care over these records. The address is:

World Church Archivist
Community of Christ Headquarters
1001 W. Walnut
Independence, MO 64050

If you have any questions, please contact your MCFO.