

If you are unsure about any of these instructions please email corporate.records@otago.ac.nz for assistance

1. Order Archive Cartons

All records sent to our department must be in official University archives cartons. These are available free of charge when transferring records to us. Please do not damage or deface the cartons, including using any non-removable tape, glue, pens or markers. You can order the cartons by emailing corporate.records@otago.ac.nz and indicating the number of cartons you will require.

2. Prepare and Pack your Records

- 2.1 Discard papers with no informational value such as duplicate copies, and reference information supplied by other departments or organisations (including minutes and agendas, publications, reports and memos for which your department was not the originator).
- 2.2 Remove any stationery items that can perish or damage the paper over time such as rubber bands and paper clips, as well as any blank pages, envelopes etc. Documents can be stapled, bound together with string or woven legal tape.
- 2.3 We need documents in a carton to be of the same type and same date range because we use the record type and the end date to apply an appropriate retention period, for example:
 - *P Card Statements, 2018*
 - *University Council Agendas & Minutes, 1995 - 1996*
- 2.4 We need documents to be in consecutive order, either alphabetically or numerically or alphanumerically, for example:
 - *Surnames A – Z*
 - *Contract Numbers I 006 – I 0541*
- 2.5 Pack your documents in the same order as you will record them on your inventory form, and please have them lying right side up in the carton for ease of retrieval.
- 2.6 Overfilled or bulging cartons are a safety hazard so please make sure that there is enough room left in each carton to place the lid securely and to retrieve documents easily.

2.7 Use a pencil to apply a box number in the label space on the front of the carton.

3. Complete the Forms

You will need to complete two forms and submit them to corporate.records@otago.ac.nz prior to the transfer of your records.

3.1 Box Contents Inventory Form

- You are welcome to use a spreadsheet or other electronic format to record your inventory and / or provide any further supplementary information that you think may be useful.
- Your inventory should contain sufficient detail to accurately identify and retrieve the records both now and into the future, for example:

<i>Description</i>	<i>Arrangement</i>	<i>Date Range</i>	<i>Box Number</i>
Student Academic Record Cards	Surnames A – LE	c1984-2001	1
Student Academic Record Cards	Surnames LI – Z	c1984-2001	2

3.2 Records Transfer Form

- This form allows our team to classify the type of records you wish to transfer (if you are unsure how to complete section 2 of the form please ask for guidance).
- The form also allows for your Head of Department's authorisation to transfer some of your records to our team.

4. Transfer Your Records

When your transfer has been accepted, we will provide you with a unique Transfer Number e.g. T19-XX. The first number denotes the year of the transfer and the last two digits is your unique number. *You will need to quote this number when requesting a record for retrieval so please keep a record of your Transfer Number and a copy of your inventory for your own reference.* We will also let you know who to contact to arrange the transportation of your records to our building.

Please remember at any time you are able to contact us at corporate.records@otago.ac.nz for guidance.