

INSTRUCTIONS FOR FILLING OUT THE E-FORM

This form is provided in MS Word for your convenience. If the required fields or format are altered in any way, CalRIM will not accept it

FOR STORAGE OF RECORDS IN SACRAMENTO: transmit the original and one copy of this transfer list to the State Records Center *in advance of the shipment of records*. Unless you have made special arrangements with the Records Center, you will be notified when the records can be accepted.

FOR STORAGE IN SRC VAULT: Transmit the original and both copies of this transfer list (make an extra copy for your files) to the State Records Center *with the shipment*.

For multiple pages of a transfer list, insert rows

1. **BILLING CODE:** Enter the agency billing code to which storage is to be charged.
2. **DESTRUCTION DATE:** Enter the year and quarter when the records can be destroyed: such as "1995.2" for the second quarter of 1995. If the quarter is not specified, the records will be scheduled for destruction in the fourth quarter of the year indicated. Enter only one destruction date per list. Minimum storage is one year.
3. **TRANSFER LIST NUMBER:** Number the list for the first shipment of records "1" and continue in numerical sequence for each shipment thereafter. If the next number in your sequence is not known, contact your departmental records management coordinator.
4. **STORAGE LOCATION:** Double click on the box relating to the Records Center in which the records will be stored. For vital records protection in secured environmentally controlled storage (usually master silver microfilm) check "Vault."
5. **DESTRUCTION METHOD:** Enter "Confidential" if these records require shredding to protect confidentiality. Enter "Non-confidential" if shredding is not required.
6. **VOLUME TRANSFERRED:** Enter the total volume (in cubic feet) transferred for each shipment of records. (Each records center carton is 1 cubic foot. For other container equivalents, contact the Records Center.)
7. **STORAGE TYPE:** Acceptable storage types are Records Center Box, Check Box, Roll Plans, 16mm Film, 35mm Film, 1000 Foot Reels. Call the Records Center for the correct description for any other storage type.
8. **SCHEDULE NUMBER:** Enter the schedule number from the Records Retention Schedule (STD. 73) covering these specific records. Records must be covered by an approved retention schedule not more than five (5) years old.
9. **APPROVAL NUMBER:** Enter the Department of General Services approval number from the Records Retention Schedule (STD. 73) covering these specific records. Records must be covered by an approved retention schedule not more than five (5) years old.
10. **BOX NUMBER:** List each box or container included in the shipment in numeric sequence starting with "1 ". DOUBLE SPACE between entries, with no more than 20 entries per page.
11. **DESCRIPTION OF RECORDS:** Describe the records using the EXACT title from the approved records Retention Schedule (STD. 73). Subtitles or specific contents of containers may be listed if desired, i.e., batch numbers, file codes, etc. DO NOT USE INFORMATION THAT VIOLATES PRIVACY OF INDIVIDUALS.
12. **SRC STORAGE NO:** Leave this column blank. The Records Center will enter storage numbers and return one copy of the list to the depositing agency.
13. **YEARS COVERED BY RECORDS:** Enter the year or years within which the records fall or the year in which activity terminated.
14. **ARCHIVES FLAG:** Enter an "X" if the State Archivist has flagged the listing for these records by stamping "Hold/Notify Archives" next to the listing on the Records Retention Schedule. Do not repeat if all containers on the list are for the same item number.
15. **ITEM NUMBER:** Enter the item number for these records from the Records Retention Schedule. This entry need not be repeated if all containers on the list are for the same item number.

NOTE: Records stored in a State Records Center are owned by the depositing agency. Records Center personnel cannot make decisions about your records or release them to unauthorized requesters. Records stored in Records Centers may not be deleted from your departmental Records Retention Schedule.