RECORDS MANAGEMENT ADVICE

Issued: October 2016

Basics of Records Management:
Preparing Paper Records for Archival Transfer

Purpose: Provide guidance to state government agencies regarding the preparation of paper records for archival transfer.

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

The proper steps to follow are:

- Review the records to be transferred and consult with your Records Officer. Remove duplicate records, non-archival records and office supplies (binders, paper clips, staples). Organize material by record series.

- Use approved archival boxes, such as those available through WB Mason *(Paige Company #801 Archive Boxes - PAIG801)*. No other boxes will be accepted.

- Boxes should include only one record series and contain a packing slip *(packing slip should be typed and contain information for future access)*.

- Do not pack records tightly in a box; room should be allowed to put fingers/hand in for retrieval and re-filing. Folder should be organized facing the front of the box. Legal sized folders should face the opening side of the box.

Records designated as "archival" on the Records Retention Schedule are determined by the Maine State Archives as having continuing historical significance. Any statutory exemptions or confidential information should be clearly marked and communicated to Archives staff prior to transfer.

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 at
http://www.maine.gov/sos/arc/records/state/statetraining.html

"The right record, to the right person, at the right time, at the lowest possible cost"