How to Transfer Records
Office of Records Management • 973-275-2063 • recordsmgmt@shu.edu

Identify materials to be transferred
Check your department’s Records Retention Schedule to find the retention period for the materials you would like to transfer.

If they are not on your Records Retention Schedule, please contact the Office of Records Management. We will work with your department to update the schedule before we accept the materials.

Prepare the boxes
Following these guidelines will help ensure that materials are organized and can be retrieved quickly:

- All materials must be in standard “banker’s boxes” (approx. 12”W x 15”L x 10”H). If you need boxes, contact us and we can provide them.
- Boxes should be full, but not over-packed. If you cannot come close to filling a box, you do not have enough records to transfer.
- Place files vertically in the box, as they would be in a file drawer.
- Records should be in a common, logical order such as chronological, alphabetical, numerical, etc.
- Keep groups of similar records together. All of the records in a box should have the same destruction date.
- Label each box using the Records Management Box Label form. Number each box 1 of x, 2 of x, etc.
- Fill out the Records Transfer Memo form and place it in the first box of your transfer. Please make sure to include a general description of each box and the destruction date for each box. If you are not sure of the destruction date, refer to your department’s Records Retention Schedule or contact us for assistance.

Transfer the boxes
When the boxes are ready, contact the Office of Records Management to arrange a time to transfer them. Please do not send boxes without scheduling a time to do so.

Your department is responsible for moving the boxes to Records Management.