

Transfer of Official Permanent Records to University Archives: An Overview

Introduction

Special Collections and University Archives preserves university records of permanent value. Such records have continuing administrative, legal, fiscal or historical significance. By maintaining these records we can ensure that the important work done by your unit is documented for future generations.

Related Information

- OSU Policy and Procedures Letter 3-0190 www.okstate.edu/osu_per/policy_proced.htm
- Records Management Act, 67 Oklahoma Statute 205
- Consolidated Records Disposition Schedule, General and University and Colleges, www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm
- Oklahoma Open Records Act, 51 Oklahoma Statute Supplement, Section 24A.1 et seq www.foioklahoma.org/OpenRecords.pdf

What to Send to the Archives

- Records that document the organization, function, policies, procedures, operations, and essential transactions of the unit and friends groups
- Official correspondence and memoranda
- Committee minutes
- Publications and annual or other reports issued by your unit
- Photographs (please identify before transferring)
- Machine readable records accompanied by printed documentation
- Remove CONFIDENTIAL MATERIAL from files and make arrangement for its safe storage (only records that are exempt from the Oklahoma Open Records Act)

What You Should Keep for Your Convenience

- Personnel records
- Routine and courtesy correspondence such as: acknowledgments, announcements, confirmations, invitations, itineraries, reservations, letters of transmittal
- Material not related to the function/administration of the office:
 - General distribution memos of other offices
 - Publications of other institutions
- Departmental copies of financial records such as:
 - Monthly budget statements
 - Purchase orders
 - Receipts, vouchers, work orders
 - Salary distribution forms
- Generally, if your office does not create a record, your copies are convenience copies and may be disposed of unless they contain confidential information.



Oklahoma State University
Library

Contact for information:
Room 204
Edmon Low Library
Phone: (405) 744-6311
libscua@okstate.edu

How to Transfer Official Records to University Archives

Preparing your files:

- In order to correctly identify your records, consult the Consolidated General Records Disposition Schedule for State Universities and Colleges [available: <http://www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm>].
- Fill out a Records Destruction/Transfer Form (attached). If you have records for destruction, place them on a separate form. Make a copy for your records. Send original to University Archives, Edmon Low Library, Room 204.
- Records Destruction/Transfer Requests are reviewed on a regular basis. Transfer requests are acted upon immediately. You should receive a response within 5 working days.
- Place records approved for transfer in file folders with descriptive labels.
- Separate and label confidential materials.
- Replace hanging file folders with traditional flat folders.
- Label each box with your office name, box number (1 of 3, 2 of 3, etc.), the name of the records series, dates covered by the records, and schedule and series number (i.e., "UC GRDS, 5-15").
- Pack records in the order in which they were kept by your office.
- Prepare a list of folder titles for each box and place in the front of Box 1.
- Call University Archives at 405-744-6311 so that we may expect your records.
- If the volume of your records warrants, call Physical Plant at 405-744-7154 to arrange for transport of your records to Room 204, Edmon Low Library.
- You will receive confirmation from the University Archives that your records have been received. At that time you will be given the accession number assigned to your records. This number is used to identify the records should you need access to them.
- When the records have been processed and a finding aid has been prepared, you will receive a copy of the finding aid via campus mail. Generally this process takes 6-36 months depending on current receipts.

**OKLAHOMA STATE UNIVERSITY
NOTICE OF ITEMS FOR DESTRUCTION OR FOR TRANSFER TO ARCHIVES**

- Request to destroy records**
 Request to transfer records to University Archives

DEPARTMENT _____ DATE PREPARED _____

CONTACT PERSON _____ EXTENSION _____

Inclusive Dates	*General Records Disposition Schedule Records Series #	Item Description & Volume (cubic feet)

I hereby certify that, to the best of my knowledge, all state and federal audits have been completed and that no legal actions or investigations are pending for the above listed records.

Dean or Administrative Officer

Title

MAIL TO: Dr. Jennifer Paustenbaugh, Associate Dean
 University Archives
 Edmon Low Library – Room 204
 x49778

* Available: <http://www.odl.state.ok.us/oar/recordsmgt/grds-education.htm>

For Office Use Only

ACTION:

Approved

Taken (date and initials)

- | | |
|---|---|
| <p><input type="checkbox"/> Destruction of Records-Suzanne Frits</p> <p><input type="checkbox"/> Destruction of Records-Univ. Archives</p> <p><input type="checkbox"/> Send to University Archives</p> <p><input type="checkbox"/> Department to retain until</p> | <p>[] _____, _____</p> <p>[] _____, _____</p> <p>[] _____, _____</p> <p>[] _____, _____</p> |
|---|---|

Copy To: University Archives