



## Transferring Archival Records to the Idaho State Archives

The following explains procedures for transferring permanent records from state and local government agencies to the Idaho State Archives (ISA). **The Idaho State Archives only accepts permanent/inactive records.** To transfer your agency's archival records please follow the steps outlined below.

### PREPARING RECORDS FOR TRANSFER

- Review your agency's records management schedules. The links below may provide reference. If you require assistance contact the Idaho State Archives.
  1. State Records Management Manual  
[http://history.idaho.gov/sites/default/files/uploads/RecordRetentionBook\\_2.pdf](http://history.idaho.gov/sites/default/files/uploads/RecordRetentionBook_2.pdf)
  2. State Agency Records schedules  
<http://www.history.idaho.gov/idaho-records-center-retention-schedules>
  3. Idaho Association of Counties retention schedule  
<http://www.idcounties.org/index.aspx?nid=364>
  4. Association of Idaho Cities retention schedule  
<http://www.idahocities.org/DocumentCenter/Home/View/113>
- The Archives requires a standard sized, acid neutral or acid free, durable box 15" length x 11.5" width x 10.5" in height.' An acid neutral or acid free box is ideal for permanent records in order to maximize preservation of records. Archival acid neutral records boxes are available for sale from the State Archives. Your order can be placed by calling the State Archives at (208) 334-2620. You may also arrange to pick up a case of boxes from the Archives.
- For oversized books and ledgers, contact the State Archives for transfer information
- Pack records in the same order that they are filed in the office.
- Leave space within the container for ease of reference (about 2 - 3" of working space per box).
- Face letter size documents toward the front (printed end) of the box.
- Face legal size documents toward the side of the box (left side of printed end).
- Limit boxes to one type of record series with in a box
- Remove or replace hanging file folders with plain folders
- Provide notification about condition of records, such as fragile, unique/rare or requiring special archival attention

- Boxes must include a list of any missing files by file number
- Each case file should be in a separate folder (Don't send boxes of case files not in folders).
- Boxes ideally should weigh no more than 35lbs.

### **LABELING RECORDS BOXES AND NUMBERING BOXES**

1. Label boxes on the end of the box (under the handle)
2. Using a marker or pencil clearly identify the name, division or other organizational unit
3. Identify the type of records within the box
4. Identify the year or year range of records within the box
5. Identify the file number range within the box
6. Identify sealed or restricted records series on the box and provide the appropriate Idaho Code
7. Number the boxes with consecutive numbers – for example: 1993-1, 1993-2, 1993-3, etc. (the above information will be entered into our records management database and is essential to providing efficient reference service.

### **BOX INVENTORIES**

Each records box shall contain an inventory/container list. The list shall be submitted with the records transfer form and/or attached or inside each box. If the inventory was created electronically, please provide a copy with the transfer form

### **RECORDS TRANSFER SHEETS**

1. Transfer sheets can be requested from the State Archives or from the Archives website at <http://www.history.idaho.gov/idaho-state-records-management>
2. Please attach a copy of the inventory to the Transfer Sheet
3. Specific records box information can be completed using the form, or attach a printed box inventory to the transfer sheet. Using the transfer form as a cover sheet with the essential records information on the form
4. Cubic foot/feet of records: a standard records box 15" length x 11.5" width x 10.5" in height is equal to one cubic foot of records
5. Please keep a copy of the transfer form for your files
6. The transfer form should accompany the records at the time of transfer or can be sent electronically or by mail

### **TRANSFER OF RECORDS TO THE STATE ARCHIVES**

1. The following requirements shall be met before any transfer of records to the Idaho State Archives:
  - Compliance with retention schedules
  - Approved records box (acid neutral, etc.)
  - Proper labeling of records boxes
  - Box inventories and transfers sheets reviewed and approved by Idaho State Archives archivists
2. Advance notice and compliance of retention schedule review to Archives staff for a delivery

3. Establish a delivery schedule including time, date, volume (number of boxes) for transfer. Agency records transfers should occur within a cycle during the spring and fall months of April – May, September -October
4. For questions contact the Idaho State Archives at 208-334-2620 or [parchives@ishs.idaho.gov](mailto:parchives@ishs.idaho.gov)