# Twelve Steps to Hassle-Free Transfer of Your Records to the Archives and Records Office (ARO)

1. Request boxes from the Archives and Records Office (ARO). If you need 25 or more boxes, there is a charge of $52.82 per 25 boxes. ARO boxes are **only** to be used for sending records to ARO; they are **not** to be used as moving and storage boxes.

2. Do not write anywhere on the boxes **EXCEPT** to number them in pencil in the upper right hand corner where it reads, "Agency Box #", e.g. 1 of 3, 2 of 3, 3 of 3.

3. Make sure you are putting your files in facing the **FRONT** of the box.

4. Do not include binders or hanging file folders. Remove the documents and place them in regular file folders, or accordion folders, and label them with whatever was written on the original binder or folder.

5. Fill each box leaving about an inch of space in the back. The last box does not have to be full if there are not enough folders to fill it. Put packing material in the last box if it is not full so the folders stay upright.

6. Download and fill out the transmittal form at: http://www-library.lbl.gov/public/tmAro/faq/Rec_Trans_Form.html See Pages 2-3 for an example of a competed transmittal form.

7. Folders need to be in alphabetical order if you are archiving personnel files, medical charts, benefits files, or dosimetry records. If you are archiving files that use a numerical system (like purchase orders) they need to be in numerical order.

8. Enter the title of each folder into the transmittal form exactly as it reads on the folder.

9. List each folder in the box; the first folder in the box is folder one on the transmittal, and so on.

10. Proofread your work, e.g. if an employee name is misspelled, the Federal Records Center may not be able to locate the person's file. **If there are too many mistakes on your transmittal, the records will be returned to you to be corrected and resubmitted.**

11. Place a copy of the transmittal in box one.

12. Email your completed transmittal to aro@lbl.gov. Indicate which building and room the boxes are located and include a project number for transportation to pick up the boxes.

Have questions or need more help? Give us a call (ext. 5525) or send us an email (aro@lbl.gov)

**Berkeley Lab**
**Archives and Records Office**
**Records Transmittal**

**TO TRANSFER RECORDS, TYPE THIS FORM.** Use one transmittal for each records series. A records series consists of records having the same disposal authority and disposal date. *See* transfer and packing instructions (http://www-library.lbl.gov/public/tmAro/howto/Rec_Transfer.html) for details or call the Archives and Records Office at 486-5525.

| | | ARCHIVES AND RECORDS OFFICE USE ONLY |
|---|---|---|
| **Division and Department**<br>Information Technology / User Support | | **Berkeley Lab Accession Number** |
| **Section, Group or Project**<br>Library/ Archives and Records | | **Berkeley Lab Accession Date** |
| **Building and Room Number**<br>**69-119D** | **Extension**<br>6399 | **File Code** |
| **Person Transferring the Records**<br>John W. Stoner | | **NARA Accession Number** |
| **Department Head**<br>Rosemary Lowden | | **Archives Receipt** ***(Signature and Date)*** |
| **Records Title**<br>John Stoner's Archives Records Office (ARO) Records Management Subject Files | | |
| **Inclusive Dates of the Records**<br>2005-2007 | | **Number of Record Boxes**<br>2 |

**Brief Description of the Records**
This accession documents the activities of John Stoner, Laboratory Archivist and Records Manager at Lawrence Berkeley National Laboratory (LBNL) in providing records management services to the Laboratory. The types of records include but are not limited to training presentations, correspondence, email printouts, and draft notes. Subjects documented include but are not limited to Department of Energy (DOE) and National Archives and Records Administration (NARA) regulations and meetings, University of California (UC) records management policies and procedures, and Archives and Records Office (ARO) database redesign. The records are arranged alphabetically by file folder heading.

**Type of Materials** *(Check all that apply)*

- ___ Architectural and Engineering Drawings
- ___ Electronic Data
- ___ Graphs and Charts
- ___ Microfilm
- X Paper Files
- ___ Photographs
- ___ Sound Recordings
- ___ X-Rays
- ___ Other Specify

**Records Retention and Disposition** *(Call the Archives if you need this information.)*

___ Historically Valuable Records. Do not destroy. A detailed folder list is included with this Records Transmittal.
___ Destroy on a scheduled basis with a minimum retention of years. Disposal Date:.
A detailed folder list is included with this Records Transmittal.

**This is in accordance with:**

___ The National Archives General Retention Schedule. Citation:
___ The Department of Energy Retention Schedule. Citation:

**Disposal Authorization** *(To be signed at the expiration of retention.)*

The legal retention of the records listed on this Records Transmittal has elapsed. Since I foresee no use of these records that would justify further retention, I authorize their disposal.

_____
Dept./Div. Head Approval Date

**Berkeley Lab**
**Records Transmittal Addendum**

| **Division and Department**<br>Information Technology / User Support | **Berkeley Lab Accession Number** |
|---|---|
| **Section, Group or Project**<br>Library/ Archives and Records | **Page Number**<br>**2 of 2** |
| **Records Title**<br>John Stoner's Archives Records Office (ARO) Records Management Subject Files | |

| Box Number | Folder Number | Folder Heading |
|---|---|---|
| 1 | 1 | Archives & Records Office (ARO) Meetings |
| 1 | 2 | Archives & Records Office (ARO) Operations |
| 1 | 3 | Berkeley Lab Institute (BLI) Training Presentations |
| 1 | 4 | Database redesign |
| 1 | 5 | Department of Energy (DOE) -- Office of Science |
| 1 | 6 | Department of Energy (DOE) -- Records management orders (draft) |
| 1 | 7 | Department of Energy (DOE) -- Records management orders (final) |
| 1 | 8 | Department of Energy (DOE) -- Records management regulations |
| 1 | 9 | Department of Energy (DOE) -- UC Records |
| 1 | 10 | Electronic Records |
| 1 | 11 | Emergency Operations Center (EOC) |
| | | |
| 2 | 1 | Lawrence Livermore National Laboratory (LLNL) Archives and Records Management |
| 2 | 2 | Library |
| 2 | 3 | Manhattan Engineering District (MED) Records |
| 2 | 4 | National Archives and Records Administration (NARA) -- Correspondence |
| 2 | 5 | National Archives and Records Administration (NARA) -- Service and Storage Charges |
| 2 | 6 | National Archives and Records Administration (NARA) -- Training |
| 2 | 7 | National Archives and Records Administration (NARA) -- Transfer of Permanent Records |
| 2 | 8 | National Archives and Records Administration (NARA) -- Transfer of Temporary Records |
| 2 | 9 | National Renewable Energy Laboratory (NREL) Records Management |
| 2 | 10 | OpenNet |
| 2 | 11 | Records Management in Australia -- Email |
| 2 | 12 | University of California Records Management |
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