Why Transfer Records?

Policy

Policy on Retention of Univers

What Records to Transfer?

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The Archives collects the records of University administrative offices, academic schools and departments. The Archives will not keep every document, photograph, publication, etc. that is created by an office. Through accessioning and appraisal decisions we create the leanest documentary record of Case Western Reserve University.

If you wish to discuss your office's records in detail, please contact the Archives staff at Archives@case.edu or 216-368-3320.

Wanted Items

What the Archives wants from your office or department are the inactive records which document its purpose and functions. There are two main types of functions to be documented: core program activities and oversight/coordination activities.

Core program activities
Core program activities include work directly related to the primary programs and services which are the responsibility of your office. Examples of core activities are:

- planning a new degree program or a new major
- monitoring compliance with affirmative action guidelines
- evaluating the effectiveness of a staff training program
- contracting for demolition of a building

Oversight and coordination activities
Oversight and coordination activities include work necessary to keep all t

What Records to Transfer?

Never send these:

- blank forms, stationery, envelopes
- artifacts (e.g. plaques, mugs, clothing, jewelry)

Advice

These guidelines must be administered thoughtfully. What is a routine support activity in one office might be a core activity in another office. For example, the procedures for how to process a purchase requisition is a routine support activity for the History Department; it is a core activity for the Purchasing Department.

When to Transfer Records?

Active records should not be sent

When to Transfer Reche

What Happens to the Transferred Records?

When records are transferred to the University Archives, they are accessioned.

1. We assign an accession number that uniquely identifies this set of records.
2. We compare the contents of the boxes to the box list you prepared and note corrections if needed.
3. We record information about the records, their creators, and their transfer.
4. We send the information recorded in step 3 to you in a Records Release.
5. You sign 1 copy of the Records Release and return it to the Archives. Keep the other copy with your copy of the box list as a permanent record of what your office has transferred to the Archives.
6. The records are stored, exactly as received, in a secure, climate controlled facility, until they are processed.
7. In the fullness of time, we process the records you transferred. Non-permanent documents are removed (duplicates, convenience copies, etc.). Permanent documents are integrated with other records transferred by your office. Damaged or deteriorating documents are repaired or copied. Finding aids are created to simplify retrieval of information and documents.
8. We notify you that an accession has been processed and that the original box list has been superseded.
9. We use the information