



**Archdiocese of Atlanta**  
**Office of Archives and Records**  
404-978-0796  
**Guidelines for Packing Records**  
August 1, 2008

The following specifications should be followed in preparing boxes for transfer to storage of inactive or semi-active records and for permanent placement in the Archives:

- Only pack records that are original to your department. Discard or return records from other departments or organizations. RECORDS MUST HAVE LONG-TERM OPERATIONAL, ADMINISTRATIVE, FISCAL, LEGAL OR HISTORICAL VALUE to warrant placing in storage or in the Archives. Contact the Office of Archives and Records in advance to verify appropriate storage and value of materials.
- Review records for items that may be discarded based upon the Guidelines for Weeding. Remove clips, metal staples, clamps, post-a-notes, rubber bands, etc. Any duplicates, drafts, reference material, unofficial notes, routing slips, and other non-record material should be removed and destroyed.
- Except for microfilm and backup computer tapes, no permanent records, particularly archival materials, will be approved for off-site storage. The Office of Archives and Records has the only archival climate controlled facility in the archdiocese and therefore can provide the best environment for such records.
- Use only standard 10"x 12"x15" sized boxes. They can be ordered from Corporate Express. Copy paper boxes, long banker boxes, and odd cardboard boxes are unacceptable. Materials found in such boxes will be returned to originating departments to be repacked.
- Transfer records from hanging folders (Pendaflex) and binders to manila folders and retain folder titles, which can be penciled on the tabs. Hanging folders and binders are not records and take up too much space. Materials found in hanging folders and binders will be returned to originating departments.
- Keep files in their original order as arranged in the file drawers or binders. Pack files standing up vertically in boxes if possible. Records in file cabinets that are not arranged in a logical order for easy retrieval must be put in order before packing boxes.
- Do not overload cartons beyond original size. Partially filled boxes are also unacceptable. Keep such boxes in the department or agency until enough similar material has accumulated to fill the entire box.
- Pack only one group of records that has the same disposal date in individual boxes for shipment to storage. The date of destruction on the outside of the box must be appropriate for all records inside the box. Records with a retention period of two years or less are not eligible for transfer to storage.
- Complete a Box List Form that lists the contents of each box on a folder-by-folder basis. Put inside the box on top of the records under the lid. DO NOT TAPE LISTS TO BOXES OR LIDS. Also fill out a Transmittal Form for archival materials. Make copies of forms for your files. Send original forms to the Office of Archives and Records. The forms can be downloaded from the Archdiocese's Intranet website.
- Fill out the label on the outside of the box with agency/department name, title of record, and date or date span of the records. Use record titles in the retention schedule for guidance in labeling.
- DO NOT TAPE LIDS TO BOXES.
- Do not transfer vital, archival records or fragile materials to an off-site storage facility. Call the Archives.
- Do not send records or materials through Interoffice Mail or send one or two random files at a time to the Office of Archives and Records without including a Transmittal Form (see Intranet for copy). If possible, retain such records or materials within the department or agency until one record box can be filled with similar types of materials related to the same record group.