

Record Transfers to the State Records Center (SRC)

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1. The records must be on the approved agency-specific or one of the general records retention and disposition schedules.
2. The agency Records Coordinator must review the STD-59 and verify that the records have fulfilled their retention period in the agency.
3. The records must be scheduled for a retention period of seven months or longer at the Center to be transferred.
4. The agency Records Coordinator must contact the State Records Center Manager, Shannon Bilger, to schedule a shipment date. Available dates are booked quickly each year. It is best to assess your agencies transfer needs and contact the SRC as early as possible in the calendar year to schedule your dates.
5. The STD-59 form, Records Transfer List, must be received by the SRC at least one week prior to the shipment date. Agency Records Coordinators should send the STD-59 electronically to RA-StateRecordsMgmt@state.pa.us.

How should I pack the boxes?

1. Records should be properly boxed, labeled and packed in standard records center boxes, available through DGS.
2. Pack only one record series in each box.
3. All large metal fasteners including 3-ring binders and binder clips must be removed; standard paper clips and staples are permissible. Remove CDs/DVDs or other electronic media if possible, or make note on the STD-59 that there are CDs/DVDs in the box.
4. Leave a minimum of two inches of space in each box. This helps prevent damage and allows for easier retrieval of records during referencing.
5. All boxes must be labeled correctly and match the STD-59 form exactly.
 - a. If duplicate agency box numbers are present in any one records series in any one shipment, the boxes must be clearly marked; i.e., use an agency box number suffix (example: 21-A); the date of records; institution name or field office name to differentiate the boxes.
6. Don't use slang or other non-standard language in labeling boxes.

Completing the form:

Make certain that:

1. The information provided on the forms is in the correct format. The form contains examples in the column header of the format for each column. The format is important because when received at the SRC it is read by a data import program that populates the records management software, ERMS/OmniRim.
 - a. To copy and paste information into the form from other sources, use the "Paste Special" feature of Excel and paste the "Values" only, so that the format in the form (spreadsheet) is maintained.
2. Only one line per box is permitted with no blank lines separating boxes, records series, etc. The import program reads each line as a unique box.

List contents of the box accurately:

1. Adherence to the Records Retention and Disposition Schedule, correct classification and date of records is critical. This information is a direct input to the records management software which determines how the records are classified, stored, accessed and, most importantly, when the records will be scheduled for disposition.
2. Descriptions like “Joe Smith’s records” or “miscellaneous records” are not helpful.

What else should I know?

1. Get report for an up-to-date report of Bureau Names and Organization Codes via ERMS.
2. Records that do not appear on an approved Records Retention and Disposition Schedule cannot be purged or destroyed without Executive Board approval.
3. Approval must be obtained before destroying inactive or unscheduled records.
4. For disposal of records for discontinued programs, complete Form STD-56, *Records Action Requests Summary and Deletions*.
5. Do not destroy records listed on the schedule before the time period listed there has expired. Many records are subject to legal requirements as well as operational ones. Some records directly affect our ability to run the business.
6. If you become aware of a reason to temporarily suspend the destruction of old records – the possibility of a lawsuit, an investigation by a government agency, or some other incident that might involve records that are scheduled to be destroyed – you should immediately notify Shannon Bilger at the SRC.
7. When sending 45 or more boxes, for ease of off loading and utilization of a forklift, it is preferred that the boxes be placed on skids and shrink-wrapped.

Following the simple steps listed above will make everyone’s job easier and save us many thousands of dollars every year in box storage and handling costs. You’ll also find your own job is a lot easier when you can retrieve your own records efficiently and quickly.

Questions about sending records to storage? Contact: Shannon Bilger at 717-783-2836.

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Division of Records Administration
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