

INSTRUCTIONS:

1. This form is for use in transferring records that have met or exceeded their retention period as defined in the [Carleton University Retention Schedule](#) (CURS) and are **permanent materials** for preservation in the Carleton University Corporate Archives. If the material is not included in CURS, please contact the Corporate Archivist for further guidance.
2. Do not request to transfer any materials that are currently required for any outstanding FIPPA requests, claims, litigation, investigations, legal holds or audits.
3. Fill out your contact information as well as the authorization contact for your department in **PART A**. Please read the transfer agreement carefully.
4. Attach your own file listing **OR** complete the file listing found in **PART C**; including any box numbers if applicable, file title, date range, applicable CURS code and whether or not the file contains personal information (PI). Attach additional pages as needed.
5. Once completed, save this form under a different name and send it electronically to the Corporate Archives. Once the Corporate Archivist has completed **PART B**, the copy will be returned for you to retain in your records.
6. Do not physically transport the materials to the Corporate Archives until the Archivist has returned the form to you and scheduled the move.
7. If you have any questions or concerns regarding the Archival Review process or this form, please contact the Corporate Archives.

PART A - REQUESTING DEPARTMENT & AUTHORIZATION

Department/Office of Responsibility	Contact Name & Title	Contact Email & Phone Number

Agreement of Transfer:

I hereby authorize the transfer of the records described on the following attached forms to the Carleton University Corporate Archives. I understand that:

- The Corporate Archives will enter these materials into the Archives repository in accordance with the Carleton University Retention Schedule.
- The Department/Office will be contacted should any of the material be found at a later date not to be permanent. Any non-permanent material will be returned to the originating Department/Office or permission will be sought from said Department/Office to destroy the material if retention is complete.
- The Department/Office may request access to the material transferred if at any point in time it is required again.
- The Corporate Archives will restrict access to any materials affected by specific legislation (e.g. Canadian Copyright Act; Freedom of Information and Protection of Privacy Act).

Transfer Authorized By (name/title):	Contact Email & Phone Number	Date	Signature

PART B – ARCHIVE APPROVAL

<p><u>Archives Use Only</u> TRANSFER APPROVED BY ARCHIVES: ACCESSION NUMBER: NOTES/SPECIAL INSTRUCTIONS:</p> <p>Date Received by Archives: Receiving Archivist:</p>

PART C – FILE LISTING

Box #	File Title	Date Range (i.e. 1999-2010)	CURS CODE	PI (Y/N)

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