



Checklist for Submitting a Transfer to Enterprise Information Management (EIM)

Excel Worksheet

<input type="checkbox"/> Ensure all files are closed
<input type="checkbox"/> Sort files by final disposition
<input type="checkbox"/> Files for storage have same final disposition (DES or ASD and within a 5-year range)
<input type="checkbox"/> Pack boxes (must be at least ½ full)
<input type="checkbox"/> Enter files in Excel Worksheet
<input type="checkbox"/> Excel Spreadsheet – ensure header is filled out, all applicable RDA(s) entered including version, all columns are filled out (S/O date field is filled out if required), no columns are highlighted (this means date corrections are required or file is not ready to be transferred)*
<input type="checkbox"/> Enter boxes in DIIMS
<input type="checkbox"/> Send to Records Coordinator for review
<input type="checkbox"/> Records Coordinator assigns boxes to the transfer in DIIMS, creates transfer slip and sends to EIM for approval
<input type="checkbox"/> EIM approves transfer
<input type="checkbox"/> Boxes labeled and delivered to records centre
<input type="checkbox"/> Boxes shelved

DIIMS

<input type="checkbox"/> Ensure all files are closed
<input type="checkbox"/> Run active folders ready for transfer report
<input type="checkbox"/> Pack boxes (must be at least ½ full)
<input type="checkbox"/> Enter boxes in DIIMS
<input type="checkbox"/> Scan files to box using a barcode scanner
<input type="checkbox"/> Send to Records Coordinator for review
<input type="checkbox"/> Records Coordinator assigns boxes to the transfer in DIIMS, creates transfer slip and sends to EIM for approval
<input type="checkbox"/> EIM approves transfer
<input type="checkbox"/> Boxes labeled and delivered to records centre
<input type="checkbox"/> Boxes shelved

*[Excel Spreadsheet Procedures](#)