



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

Excel Worksheet

Ensure all files are closed

Sort files by final disposition

Files for storage have same final disposition (DES or ASD and within a 5-year range)

Pack boxes (must be at least ½ full)

Enter files in Excel Worksheet

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)*

Enter boxes in DIIMS

Send to Records Coordinator for review

Records Coordinator assigns boxes to the transfer in DIIMS, creates transfer slip and sends to EIM for approval

EIM approves transfer

Boxes labeled and delivered to records centre

Boxes shelved

DIIMS

Ensure all files are closed

Run active folders ready for transfer report

Pack boxes (must be at least ½ full)

Enter boxes in DIIMS

Scan files to box using a barcode scanner

Send to Records Coordinator for review

Records Coordinator assigns boxes to the transfer in DIIMS, creates transfer slip and sends to EIM for approval

EIM approves transfer

Boxes labeled and delivered to records centre

Boxes shelved

*[Excel Spreadsheet Procedures](#)