

## INSTRUCTIONS FOR ELECTRONIC RECORDS TRANSMITTAL AND RECEIPT

1. Enter the proper department/division/office/program name as found in the Records Management Customer Listing. RM's customer number listing is available at: [https://boa.sd.gov/central-services/docs/RM\\_Alphabetical.pdf](https://boa.sd.gov/central-services/docs/RM_Alphabetical.pdf)
2. Enter the four-digit Records Management Customer number. Using the correct customer number is important for the correct agency to be billed for storage service. This number also shows ownership of the records.
3. Enter the building name or mailing address.
4. Enter the transmittal date (i.e. the date the form is being completed).
5. Enter the name of individual completing the form.
6. Enter contact phone number.
7. Enter the ARMS number from the Red ARMS box label, which uniquely identifies each box.
8. Enter the records series number and name as it is listed the agency's Records Retention and Destruction Schedule. If you do not have the agency's current Records Retention and Destruction Schedule, please obtain a copy from your Records Officer or use the link provided on the transmittal form.
9. Enter the six-digit R.D.B. Authority Number from the Records Retention and Destruction Schedule. (Example 07-009).
10. Enter the record identifier (i.e., number or name) for the records being sent to storage. Limit entry to 10 characters.
  - 10A Record identifier for the first record in the box.
  - 10B Record identifier for the last record in the box.
11. Enter the record inclusive dates (time frame the records cover). The ending inclusive date will be used to calculate the disposal date. Records Management also uses the inclusive dates to verify the disposal date has been entered correctly. Limit entry to 10 characters.
12. Enter the disposal date. Boxes are destroyed in either January or July of each year (i.e. 01/2000 or 07/2000). Calculate the disposal date by using the entire retention period set forth in the Records Retention and Destruction Schedule and the ending inclusive date of the record.
13. Select the number of boxes listed on the transmittal for transfer.
14. Items 14-18. Information is completed by Records Management.

Upon completing the information, e-mail this form as **Microsoft Word Attachment** using the standard agency abbreviation and transmittal date as e-mail subject line, and send to the global email address BOA-RECMGT FRONT DESK. To ensure your boxes are picked up on Wednesday, this form must be received by Records Management before 3:30 on Tuesday.

Filing out the transmittal correctly assures the correct office will be charged for the storing of the records; ensures the records are maintained for the correct amount of time before being destroyed; assists the offices in identifying which records they have stored in each box; and makes it easier for the office to retrieve any records in the future.

After the boxes have arrived and are stored, Records Management will e-mail the completed form to you as your receipt. The agency should use the copy when making future referrals to the stored records.

If you have any questions or concerns, please feel free to contact Records Management at (605) 773-3589.

### **Box Requirements:**

**Place ARMS Box Label in designated area.**

**Tape the bottom of boxes shut.**

**Maximum weight may not exceed 40 pounds.**

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<b>SOUTH DAKOTA RECORDS TRANSMITTAL AND RECEIPT FORM</b>  <b>BOA State Records Management Program (Revised 06/2019)</b>	<b>State Records Management Center 104 South Garfield Avenue; Building E Pierre, SD 57501</b>  <b>Telephone: (605) 773-3589 Fax: (605) 773-5955</b>	<b>OBTAINING REFERENCE SERVICE:</b> You may obtain reference services to your records by telephoning RM, by accessing RM's RM02 mainframe application, by E-Mailing request information to the global address BOA-RECMGT RETRIEVALS, by FAX or by written request.
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**INSTRUCTIONS:** Use this form to transfer records to the State Records Center for storage. Obtain a copy of your Agency's Records Retention and Destruction Manual by using the following link: <https://boa.sd.gov/central-services/records-management-stateretentionmanuals.aspx> Complete information and e-mail this form as a Microsoft Word attachment using the standard agency abbreviation and transmittal date as e-mail subject line, and send to the global email address **BOA-RECMGT FRONT DESK**.

To ensure your boxes are picked up on Wednesday, this form must be received by Records Management before 3:30 p.m. on Tuesday. **Records Management will arrange to have the boxes listed on this form picked up by Buildings and Grounds.** Shaded areas on this form will be completed by Records Management. A completed copy will be e-mailed to the individual completing the form as your receipt. Please use this receipt when calling for reference service to the stored records.  
**\*\*PLEASE REMEMBER: BOXES MUST NOT EXCEED 40 POUNDS GROSS WEIGHT\*\***

Department/Division/ Office/Program: <b>1</b>	Rec Management Customer #: <b>2</b>
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Building Name or Mailing Address: **3**

Transmittal Date: <b>4</b>	Your Name: <b>5</b>	Telephone Number: <b>6</b>
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ARMS BOX # <small>(6 Digits)</small>	RECORDS CENTER LOCATION COMPLETED BY RECORDS MANAGEMENT			ONLY USE RECORD SERIES NUMBER AND NAME AS LISTED IN THE RECORDS RETENTION AND DESTRUCTION SCHEDULE (40 CHARACTERS)	R.D.B. Authority Number: <small>(6 Digits)</small>	CONTENTS <small>(LIMIT 10 CHARACTERS)</small>				DISPOSAL DATE: <b>01/YYYY</b> OR <b>07/YYYY</b>
	ROW	SHELF	BIN			ALPHABETIC OR NUMERIC		INCLUSIVE DATES		
						FROM <small>(i.e. Anderson)</small>	TO <small>(i.e. Smith)</small>	FROM <small>(i.e. FY2013)</small>	TO <small>(i.e. FY2014)</small>	
<b>7</b>	<b>14</b>	<b>14</b>	<b>14</b>	<b>8</b>	<b>9</b>	<b>10A</b>	<b>10B</b>	<b>11</b>	<b>11</b>	<b>12</b>

<b>13</b> Select # of Boxes	<b>RECORDS MANAGEMENT USE ONLY:</b>					
<b>Select for RM Notes</b>		Entered by/Date:		Number of Boxes Received:	Records Center Operator:	Date Stored:
<b>15</b>		<b>16</b>		<b>17</b>	<b>18</b>	